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Tourism Marketing & Development Plan

Fiscal Year **2012**

» MARYLAND TOURISM DEVELOPMENT BOARD AND THE OFFICE OF TOURISM DEVELOPMENT «

Tourism Marketing & Development Plan

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SECTION 01
Executive Messages

Executive Director's Message

Dear Tourism Partner:

On behalf of the staff of the Maryland Office of Tourism Development, I am proud to share with you some of last year's accomplishments as well as highlight our FY 12 goals.

This Tourism Marketing and Development Plan was designed in alignment with the four goals of the Department of Business and Economic Development (DBED). These goals guided the tourism staff in the development of action plan items that are integral components of our annual work plan. Detailed below are the Office of Tourism Development (OTD) Goals, and updates on core deliverables, specific FY 11 Action Plan Key Deliverables and any new FY 12 Key Deliverables:

GOAL 1: SUSTAIN AND IMPROVE JOBS IN THE TOURISM INDUSTRY

Core Deliverable:

» Continue leadership in planning and hosting the Maryland Travel and Tourism Summit, the foremost educational program available to all members of our industry — *The 2011 conference will be held at the Marriott Inn & Conference Center, University of Maryland University College.*

FY 12 Key Deliverable:

» Commission advertising effectiveness study to measure revenues and jobs generated by OTD efforts.

GOAL 2: SUSTAIN AND INCREASE ECONOMIC IMPACT FROM TOURISM

Core Deliverable:

» Monitor tourism sales tax codes — *Report state data monthly, county data quarterly.*

FY 11 Key Deliverables:

» Administer the Welcome Center Assistance Program — *Complete. Charles & Worcester counties final reports due October 31, 2011.*

» Provide promotional support for Baltimore's inaugural Civil War commemoration events in April 2011. — *Complete. OTD continues to market Civil War events in monthly consumer newsletter, as well as ongoing efforts in* Civil War Traveler *and* Washington Post *advertorials.*

» Partner with Visit Baltimore and other county tourism offices on AIBTM — The Americas Meetings & Events Exhibition and America Meetings Week, June 19–24, 2011 — *Complete. Planning in progress for 2012 conference.*

FY 12 Key Deliverables:

» Maximize future sales opportunities from the African-American Travel Conference in Baltimore in April 2012.

» Promote upcoming commemoration offerings to major tour operators domestically and internationally. Offer Canadian co-op to DMOs and private sector partners.

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

FY 11 Key Deliverables:

» Launch Phase II of the VisitMaryland interactive map, adding core tourism businesses, such as lodging and sporting venues. Survey users to prioritize new enhancements. — *In Progress.*

- Complete research and design scope of work for mobile applications for the tourism web site and the interactive map tool. — *Complete. Developed mobile version of VisitMaryland.org instead of app. Mobile site went live August 2011.*

- Create custom database of tourism assets as well as a new call center/ fulfillment customer management system. — *In Progress. Finalizing outstanding issues, including integrating with the VisitMaryland interactive map.*

- Craft and launch a communications platform for the FY 11–15 commemoration period. — *In Progress. Multiple marketing vehicles in development — e.g., television, collateral, Web design.*

FY 12 Key Deliverables:

- Launch updated African-American Heritage Travel Guide during the April 2012 African-American Travel Conference in Baltimore.

- Develop seasonal sweepstakes with statewide partners, packaging and promoting authentic Maryland experiences

- Generate and increase video content on Maryland YouTube Channel.

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

Core Deliverables:

- Administer projects assisted with $6.1 million in Federal Highway Administration Scenic Byway Grants for the Civil War Sesquicentennial, Harriet Tubman Centennial and the War of 1812 Bicentennial — *On Target. FY 12 marketing efforts include MPT War of 1812 travelogue; new Star-Spangled consumer web site; domestic and international byways marketing; and new printed and online byways map and guide, as well as the planning and development of the Antietam Campaign Civil War Trails mobile application.*

I join Maryland Tourism Development Board Chair, Greg Shockley, in encouraging you to review the OTD Events Calendar as well as the partner marketing and new cooperative advertising opportunities detailed in this plan. Working collaboratively with a unified message is one way to make all our marketing dollars go further.

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

All the best,

Margot A. Amelia

Margot A. Amelia
Executive Director , Maryland Office of Tourism Development

Maryland Tourism Development Board Chairman's Message

MISSION STATEMENT

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

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

Dear Tourism Industry Partners:

As Chair of the Maryland Tourism Development Board, I want to thank you for the hard work you do every day to provide a positive trip experience for Maryland visitors. Our tourism industry is a powerful economic engine and job generator, employing more than 134,000 Marylanders from Oakland to Ocean City.

And tourism generates and continues to grow significant revenue integral to Maryland's economic vitality. The Bureau of Revenue Estimates has reported more than $359 million in revenues attributable to tourism in FY 2011, an increase of 5.1 percent over FY 2010, outperforming the 3.6 percent growth of overall sales taxes by 40 percent.

This increase in revenue is no doubt driven by the fact that Maryland welcomed 32.2 million domestic visitors in 2010, an increase of 10.7 percent from 2009, and an increase of 18.3 percent from 2007's 27.2 million visitors, according to D.K. Shifflet and Associates, a leading tourism industry research firm.

Maryland's 18.3 percent increase — representing an additional 5 million visitors from 2007 to 2010 — was substantially greater than the 1.1 percent growth the United States saw during this time period, and significantly greater than the performance of other Mid-Atlantic states. Maryland has increased market share 16.9 percent since 2007, outperforming national and regional trends during this challenging economic climate.

I am proud of this Board's continuing work with the Office of Tourism, and am pleased to present the Fiscal Year 2012 Tourism Marketing and Development Plan. The objectives and strategies of this plan are designed to enhance tourism's positive economic impact.

To comply with the accountability-related goals of Governor O'Malley's administration, the Office of Tourism Development aligns this marketing plan to performance-based success measurements. Such standards provide both our board and the Office of Tourism Development with the tools to better quantify marketing successes, while providing a road map for attaining higher returns on future marketing efforts.

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

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

Sincerely

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

SECTION 02

Destination Situation Analysis

Travel Industry Trends

Sailing in Annapolis, MD

Despite ongoing economic challenges, travel continues its comeback. The U.S. Travel Association reported that travelers spent 7.7 percent more nationwide in 2010 than they had in 2009 and continued growth in visitation and revenue are expected in 2011. Following significant increased visitation in 2010, U.S. Travel Association forecasts modest visitation growth for domestic and international travel overall for the next four years: 2.1 percent in 2011, 1.9 percent in 2012, 2.3 percent in 2013 and 2.3 percent in 2014. Travel expenditures are expected to increase at a faster rate: 7.7 percent in 2011, 4.2 percent in 2012, 4.9 percent in 2013 and 4.6 percent in 2014.

Many travelers continue to report that current economic conditions will alter how they travel, and many are still looking to economize in their travel spending. A survey commissioned by the Mark Travel Corporation in spring 2011 found that 24 percent of travelers plan to increase the number of leisure trips they take in the coming year, while a similar 22 percent said they would cut back on trips. Thirty-four percent of the respondents said they were cutting costs in other areas so they could afford to travel, but 32 percent said they would take fewer trips, eat out less, take shorter trips and opt for less expensive vacations because they can't afford the kinds of trips they would like.

Similarly, the Ypartnership/Harrison Group 2011 Portrait of American Travelers survey revealed a variety of key trends, including Americans' unwavering commitment to travel despite persistent economic concerns. Americans treasure their leisure and vacation time — citing travel as their number two passion behind family, the survey found. These travelers are also savvier and more self-reliant since the arrival of the Great Recession. Also enabled by the continued growth of the Internet, they are more determined than ever to obtain the most value from their travel purchases — though their definition of this is no longer based on price alone. Social media are gaining credibility as a trusted information source, with one-third of travelers visiting sites such as Trip Advisor and YouTube prior to booking.

Hotel performance has also recovered. Smith Travel Research continues to report steady growth in revenue per available room (RevPAR), with increases in demand, occupancy, and average daily rate. Higher performance has also been reported in the cruise industry, business travel, and international travel. Baltimore-Washington International Thurgood Marshall Airport reported a record 22 million passengers for the year, an increase of 4.7 percent compared to 2009. This announcement was followed by additional record-breaking months throughout 2011.

Also beginning to climb out of economic troubles were state tourism marketing offices. Amid this increase in pent-up demand, tourism office budgets continue to be impacted by declining state revenues and reduced budgets. However, according to the U.S. Travel Association, after falling to the lowest point in five years in FY 2010, state tourism office budgets increased by 2.2 percent in FY 2011, and are forecast to rise 1.3 percent in FY 2012.

Maryland tourism marketers will need to be more nimble than ever as they deal with increased marketing competition from other states, anemic consumer confidence and multiple channels of communication to manage amid an uncertain economic climate. Successful travel promotion will require, as always, the best possible understanding of the consumer and the factors influencing their travel decisions.

Maryland Visitor Statistics

For calendar year 2010, D.K. Shifflet & Associates reports that Maryland hosted an estimated 32 million domestic visitors, up 10.7 percent from 2009 compared to a 9.8 percent increase in domestic person-trips in the United States.

Seventy-seven percent, or 24.81 million, were leisure visitors, and the remaining 23 percent, or 7.36 million, were business travelers. Overnight and day trips were roughly the same — with 16.11 million overnight travelers and 16.06 million day trip travels reported in 2010.

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

In 2010, a higher percentage of Maryland leisure stays consisted of an overnight visit versus a day trip — 48 percent and 42 percent, respectively — counter to what the data reflected the previous year when leisure day trips were more common than leisure overnight stays, while 58 percent of business trips were day trips and 42 percent included an overnight stay.

VISITOR VOLUME ESTIMATES (PERSON-TRIPS IN MILLIONS)

	Maryland			United States		
	2010	2009	2008	2010	2009	2008
TOTAL	**32.17**	**29.06**	**28.08**	**2021.86**	**1,841.24**	**1,947.82**
BUSINESS	7.36	7.00	7.10	429.52	422.17	479.81
LEISURE	24.81	22.07	20.98	1,592.34	1,419.07	1,468.01
OVERNIGHT	16.11	14.15	13.86	1,002.21	925.90	973.64
DAY TRIP	16.06	14.92	14.22	1,019.65	915.34	974.18

Source: D.K. Shifflet & Associates, Ltd. DIRECTIONS Travel Intelligence System based on person-trips

MARYLAND DESTINATION REGIONS

	SHARE OF MARYLAND VISITATION IN 2010
CENTRAL REGION (ANNE ARUNDEL, BALTIMORE CITY, BALTIMORE, CARROLL, HARFORD, HOWARD COUNTIES)	53%
EASTERN SHORE (CAROLINE, CECIL, DORCHESTER, KENT, QUEEN ANNE'S, SOMERSET, TALBOT, WICOMICO, WORCESTER COUNTIES)	18%
CAPITAL (FREDERICK, MONTGOMERY, PRINCE GEORGE'S COUNTIES)	16%
WESTERN MARYLAND (ALLEGANY, GARRETT, WASHINGTON COUNTIES)	10%
SOUTHERN (CALVERT, CHARLES, ST. MARY'S COUNTIES)	3%

Source: D.K. Shifflet & Associates, Ltd., with independent analysis by the Maryland Office of Tourism based on person-stays

Trends & Comparisons

National domestic travel volume grew from 2009. Specifically, total domestic U.S. visitor volume, as measured in person-trips, grew 9.8 percent from 2009 to 2010. Leisure travel represented more than 79 percent of all person-trips, two points more than the previous year as the percent of business trips compared to all trips continued to slightly decline; with all overnight and day trips evenly split at 50 percent each.

Maryland outperformed national trends and reflected regional growth in 2010, with growth in all sectors: business, leisure, day and overnight. Maryland's net travel volume has grown at a double-digit rate since 2007, significantly greater than the performance of other Mid-Atlantic states, outperforming Washington, D.C., in overall growth and overnight increases.

Maryland has welcomed an additional 5 million visitors from 2007 to 2010 — growing market share 16.9 percent, outperforming national and regional trends during this challenging economic climate.

PERCENT CHANGE IN PERSON-TRIP VOLUME 2009–2010

	U.S.	MD	DC	DE	PA	VA	WV
TOTAL	**9.8%**	**10.7%**	**6.4%**	**17.8%**	**7.2%**	**12.2%**	**9.2%**
BUSINESS	1.7%	5.3%	3.1%	(16%)	(3.3%)	6.6%	18.0%
LEISURE	12.2%	12.4%	8.8%	28.6%	9.4%	13.9%	7.6%
DAY TRIP	11.4%	7.7%	31.9%	0.3%	7.3%	14.1%	10.9%
OVERNIGHT	8.2%	13.9%	(6.1%)	40.2%	7%	10.6%	7.2%

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

PERCENT CHANGE IN PERSON-TRIP VOLUME SINCE 2007

	U.S.	MD	DC	DE	PA	VA	WV
TOTAL	**1.1%**	**18.3%**	**14.8%**	**(2.2%)**	**2.9%**	**4.4%**	**(1.1%)**
BUSINESS	(14.6%)	11.4%	12.5%	(30.6%)	(22.6%)	(13.5%)	(4.3%)
LEISURE	6.4%	20.5%	16.5%	6.8%	9.7%	11.2%	(0.4%)
DAY TRIP	1.0%	15.7%	48.9%	(22.6%)	1.1%	(0.1%)	(13.4%)
OVERNIGHT	1.3%	21.0%	(0.7%)	28.6%	4.9%	8.6%	18.8%

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

Maryland Visitor Profile Trends

TOP TEN TOURISM ACTIVITIES

The top ten tourism activities in Maryland are similar to the U.S. overall, with dining, shopping, entertainment, sightseeing and nightlife ranked in the top five. Beach/waterfront ranked sixth in Maryland (seventh nationally), while attending sports event ranked higher in Maryland than in the U.S.

TOP TEN TOURISM ACTIVITIES PER STAY, 2010

Maryland		United States	
DINING	39%	DINING	35%
SHOPPING	25%	SHOPPING	23%
ENTERTAINMENT	18%	ENTERTAINMENT	20%
SIGHTSEEING	9%	SIGHTSEEING	10%
NIGHTLIFE	9%	NIGHTLIFE	5%
BEACH/WATERFRONT	6%	GAMBLE	5%
ATTEND SPORTS EVENT	6%	BEACH/WATERFRONT	4%
VISIT HISTORIC SITE	6%	PARKS (NATIONAL/STATE)	4%
PARKS (NATIONAL/STATE)	5%	VISIT HISTORIC SITE	4%
MUSEUM, ART EXHIBIT	5%	MUSEUM, ART EXHIBIT	4%

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

TOP TWO DESTINATIONS

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

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

MARYLAND AND TOP TWO DESTINATIONS TRAVELER SUMMARY, 2010

	Maryland	Baltimore	Ocean City
Estimated share of visits	--	33.6%	10.2%
Estimated Person-stays	41 million	13.8 million	4.2 million
Avg. travel party size	2.07	1.95	2.65
Avg. length of trip (days)	1.32	1.3	2.68
Avg. spending per person per day	$111.06	$135.04	$99.22
Spending in MD per group stay	$303	$342	$705
Top 3 DMAs of origin	Washington, DC (25%) Baltimore (23%) Philadelphia (11%)	Washington, DC (27%) Philadelphia (14%) Baltimore (13%)	Baltimore (37%) Washington, DC(18%) Philadelphia (17%)

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

$13.7 BILLION IN VISITOR SPENDING IN MARYLAND IN 2009

The most recent visitor expenditure report reflects 2009 data. Travelers in Maryland spent $13.7 billion in 2009. Transportation and food account for the largest share of visitor spending, followed by spending on lodging, shopping and entertainment. Overall travel expenditures in Maryland declined 5.5 percent from 2008 to 2009, from $14.4 billion to $13.6 billion. It is important to note that the U.S. Travel Association reported a national decline of 8.8 percent.

The 2010 spending analysis, available in November 2011, is likely to report a reversal of 2009 declines, based upon the growth in visitor volume coupled with reports of a consumer spending rebound in the last calendar year.

TRAVEL EXPENDITURES (IN MILLIONS)

	2009	2008	2007
TRANSPORTATION	$3,587.7	$3,801.7	$3,598.3
FOOD	$3,362.8	$3,584.6	$3,482.7
LODGING	$2,510.3	$2,526	$2,434.3
SHOPPING	$2,444.5	$2,696.8	$2,707.8
ENTERTAINMENT	$1,745.6	$1,835.7	$1,803.5
TOTAL	**$13,651**	**$14,444.7**	**$14,026.5**

Source: IHS Global Insight. Updated to reflect latest data available.

Lodging Sector Trends

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

The following lodging measurements are detailed below:

- Room Demand — reflects the percentage change in the number of rooms sold
- Room Supply — reflects the percentage change in the number of rooms available
- Room Rates — reflects the average cost per room
- Room Revenue — reflects the percentage change in the amount of revenue collected
- Occupancy Percent — reflects the percentage of rooms occupied
- Revenue per Available Room (RevPAR) — reflects the total guest room revenue divided by the total number of available rooms. Occupancy x Average Daily Rate = RevPar

CALENDAR YEAR 2010 ANALYSIS

Demand for Maryland's hotel rooms grew 8.5 percent, outperforming the nation and the region, which posted gains of 7.7 and 6.7 percent respectively. Maryland's room supply grew by 2.8 percent from 2009 — one point higher than national growth of two percent and slightly higher than the 2.5 percent regional growth.

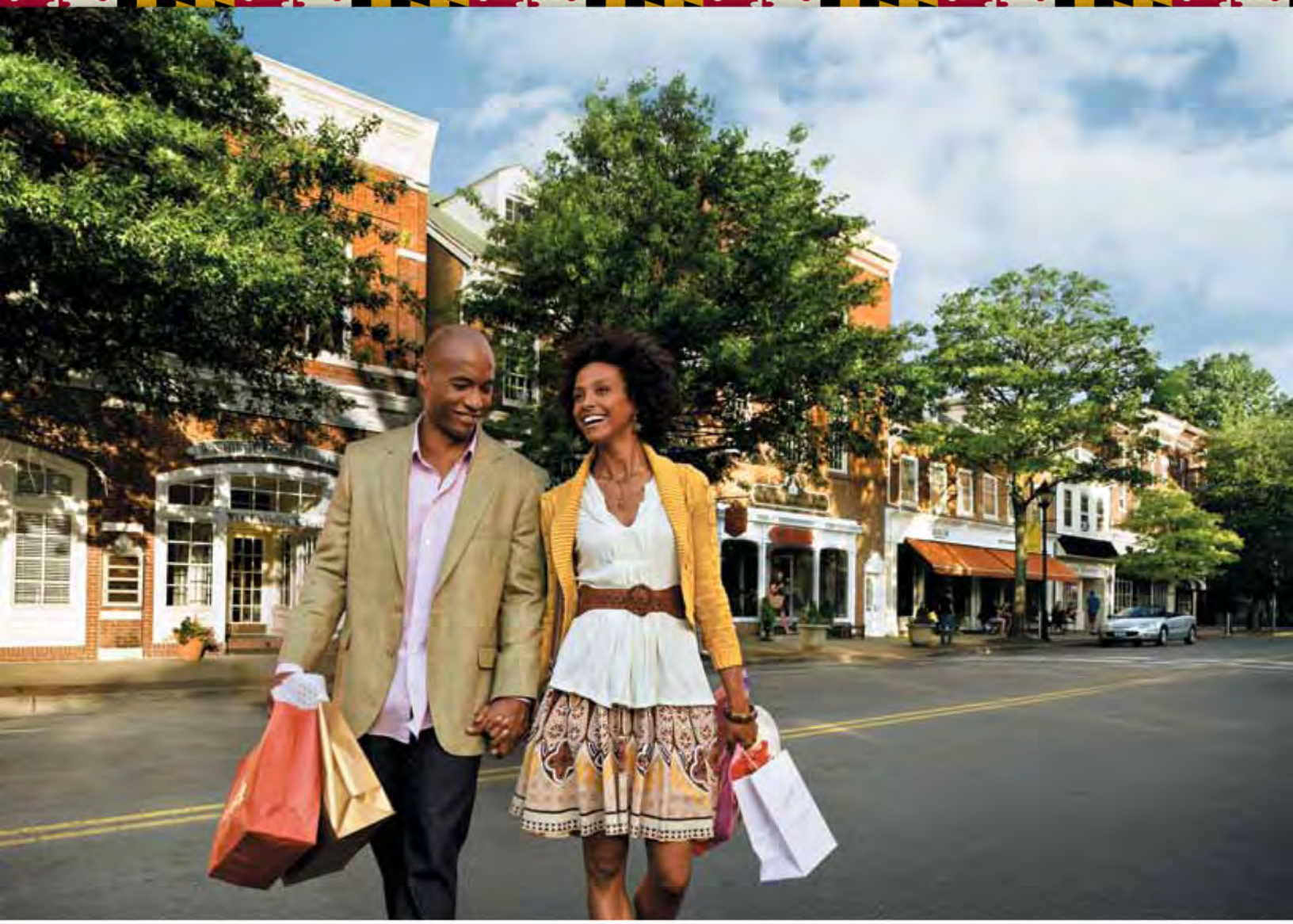
Average room rates for the state as a whole remained relatively flat at $110; the average U.S. room rate remained flat at $98, with the region flat at $115 in 2010. Room revenues, which are tied to room demand and room rates, grew 6.8 percent from 2010, one point behind the nation's 7.6 percent revenue growth and ahead of the regional growth of 5. 2 percent. Revenue per available room was up 3.7 percent in Maryland, one point higher growth than the region, and two points lower than national growth.

The following table details the six metrics for the U.S., Maryland, Maryland's counties (when available), and the MD-VA-DC-DE region.

CALENDAR YEAR 2010
LODGING PERFORMANCE COMPARISON

	ROOM DEMAND PERCENT CHANGE	ROOM SUPPLY PERCENT CHANGE	AVERAGE ROOM RATE	AVERAGE ROOM RATE PERCENT CHANGE	ROOM REVENUE PERCENT CHANGE	OCCUPANCY RATE	OCCUPANCY PERCENT CHANGE	RevPAR	RevPAR PERCENT CHANGE	HOTELS	SAMPLE
SEGMENT											
UNITED STATES	7.7%	2.0%	$98.08	(0.1%)	7.6%	57.6%	5.7%	$56.44	5.5%	4,816,097	3,386,277
MARYLAND	8.5%	2.8%	$110.22	(1.5%)	6.8%	59.6%	5.5%	$65.54	3.7%	71,588	62,884
MD-VA-DC-DE REGION	6.7%	2.5%	$115.27	(1.4%)	5.2%	60.2%	4.1%	$69.37	2.6%	336,310	296,891
MD COUNTIES											
BALTIMORE CITY	11.5%	3.0%	$137.51	(1.0%)	10.4%	61.0%	8.2%	$83.92	7.3%	9,636	9,133
ALLEGANY	4.8%	6.7%	$84.35	(4.7%)	(0.1%)	53.6%	(1.8%)	$45.20	(6.4%)	997	931
ANNE ARUNDEL	9.3%	2.2%	$95.51	(3.4%)	5.6%	68.9%	6.9%	$65.76	3.3%	10,439	9,687
BALTIMORE	8.0%	3.8%	$87.23	(3.6%)	4.1%	56.1%	4.0%	$48.96	0.2%	5,883	5,300
CALVERT	4.5%	0.0%	$100.69	(1.8%)	2.6%	56.9%	4.5%	$57.25	2.6%	772	772
CECIL	12.5%	5.5%	$69.51	0.3%	12.8%	47.8%	6.6%	$33.19	6.9%	1,077	866
CHARLES	13.8%	9.9%	$83.57	(3.4%)	9.9%	52.4%	3.5%	$43.81	(0.0%)	1,570	1,070
DORCHESTER	9.2%	0.0%	$158.36	(1.7%)	7.4	51.2%	9.2%	$81.15	7.4%	681	601
FREDERICK	(9.8%)	0.0%	$82.11	2.2%	(7.8%)	58.3%	(9.8%)	$47.88	(7.8%)	2,235	2,081
HARFORD	7.8%	4.7%	$74.68	(3.5%)	4.0%	58.0%	2.9%	$43.34	(0.6%)	2,591	2,222
HOWARD	10.1%	2.4%	$86.39	(4.2%)	5.5%	61.1%	7.6%	$52.80	3.0%	3,570	3,219
MONTGOMERY	13.2%	6.2%	$122.43	(2.3%)	10.7%	65.6%	6.6%	$80.27	4.2%	9,596	9,447
PRINCE GEORGE'S	9.4%	0.3%	$123.50	(2.7%)	6.4%	61.9%	9.1%	$76.40	6.1%	10,003	9,529
QUEEN ANNE'S	0.3%	0.0%	$109.09	1.5%	1.8%	47.9%	0.3%	$52.30	1.8%	469	403
ST MARY'S	20.7%	13.1%	$91.81	(0.5%)	20.1%	53.6%	6.7%	$49.20	6.1%	1,017	881
TALBOT	0.6%	0.0%	$149.09	1.7%	2.3%	47.6%	0.6%	$70.91	2.3%	935	522
WASHINGTON	2.7%	3.5%	$72.35	1.6%	4.3%	49.5%	(0.8%)	$35.82	0.7%	2,178	2,026
WICOMICO	7.2%	2.3%	$81.20	0.1%	7.3%	47.7%	4.8%	$38.77	4.9%	1,665	1,234
WORCESTER	3.5%	0.3%	$138.53	1.4%	5.0%	52.8%	3.2%	$73.10	4.7%	5,386	2,835
MD REGIONS											
WESTERN	2.5%	3.9%	$77.78	0.7%	3.2%	50.2%	(1.3%)	$39.01	(0.7%)	3,665	3,146
CAPITAL	8.8%	2.8%	$119.11	(1.4%)	7.2%	63.1%	5.9%	$75.14	4.4%	21,829	21,201
CENTRAL	9.5%	2.9%	$104.03	(2.2%)	7.0%	62.5%	6.4%	$64.99	4.1%	31,954	29,554
SOUTHERN	13.1%	8.4%	$89.83	(2.7%)	10.0%	53.6%	4.4%	$48.16	1.5%	3,359	2,751
UPPER EASTERN SHORE	3.5%	1.9%	$116.50	(0.3%)	3.2%	46.9%	1.6%	$54.65	1.3%	3,463	2,707
LOWER EASTERN SHORE	3.4%	0.4%	$127.93	1.1%	4.5%	51.0%	3.0%	$65.23	4.1%	7,239	4,211

Source: Smith Travel Research, Inc.; County data unavailable due to small sample sizes in Caroline, Carroll, Garrett, Kent and Somerset counties. Data for these counties is included in their respective regions.



Easton, MD

FIRST HALF 2011 ANALYSIS

Unlike most visitor data, the STR lodging data is available on almost a 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 2.5 percent year-to-date, compared to the same six-month period in 2010. Maryland's demand grew at a slower pace than the nation's, in line with the regional trend. The number of rooms available (room supply) remained relatively flat across the state, region, and nation. As new development tapered off, Maryland hotels began to readjust rates slightly when dealing with increased demand.

Average room rates for Maryland as a whole were up slightly to $109 compared to the same time the previous year. The rate is higher than the nation's $100.50 room rate, but slightly behind the national rate growth of 3.3 percent. The regional room rate was $118, slightly higher than Maryland's rate, but increasing at the same rate. Room revenues continued to rebound, up 3.5 percent compared to the same six-month period in 2010 due to the increase in demand and rate. Revenue per available room was up 2.9 percent for the state, compared to 2.5 percent for the region.

Occupancy rates, which reflect changes in supply and demand for rooms, averaged 60 percent, 1.9 percent more than last year, compared to 5 percent growth for the U.S. and 1.5 percent growth for the region.

JANUARY–JUNE 2011
LODGING PERFORMANCE COMPARISON

	ROOM DEMAND PERCENT CHANGE	ROOM SUPPLY PERCENT CHANGE	ROOM REVENUE PERCENT CHANGE	AVERAGE ROOM RATE ($)	AVERAGE ROOM RATE PERCENT CHANGE	OCCUPANCY RATE	OCCUPANCY PERCENT CHANGE	RevPAR	RevPAR PERCENT CHANGE	HOTELS	SAMPLE
SEGMENT											
UNITED STATES	5.8%	0.8%	9.4%	$100.54	3.3%	59.2%	5.0%	$59.49	8.5%	4,881,386	3,460,475
MARYLAND	2.5%	0.6%	3.5%	$109.00	1.0%	59.8%	1.9%	$65.13	2.9%	75,291	63,899
DC-MD-VA-DE REGION	2.6%	1.0%	3.6%	$118.01	1.0%	60.6%	1.5%	$71.55	2.5%	345,027	298,891
MD COUNTIES											
BALTIMORE CITY	3.5%	1.0%	4.4%	$138.21	0.8%	62.4%	2.5%	$86.18	3.3%	9,670	9,130
ALLEGANY	(2.1%)	0.0%	(1.1%)	$84.05	1.0%	47.4%	(2.1%)	$39.87	(1.1%)	1,015	931
ANNE ARUNDEL	1.1%	(0.0%)	1.5%	$95.19	0.4%	70.3%	1.1%	$66.91	1.6%	10,439	9,687
BALTIMORE	5.0%	(0.8%)	7.1%	$89.32	1.9%	58.9%	5.8%	$52.62	7.9%	5,782	5,135
CALVERT	(2.1%)	0.0%	(1.3%)	$99.56	0.8%	55.5%	(2.1%)	$55.31	(1.3%)	772	700
CECIL	12.4%	5.3%	17.8%	$70.75	4.8%	48.6%	6.8%	$34.40	11.9%	1,077	866
CHARLES	7.9%	4.3%	6.1%	$82.59	(1.7%)	55.3%	3.4%	$45.70	1.7%	1,570	1,070
DORCHESTER	(4.6%)	0.0%	1.0%	$154.17	5.9%	46.2%	(4.6%)	$71.22	1.0%	681	601
FREDERICK	9.0%	(1.1%)	6.9%	$81.22	(1.9%)	63.7%	10.2%	$51.77	8.1%	2,205	2,081
HARFORD	12.1%	0.0%	18.1%	$77.74	5.3%	62.0%	12.1%	$48.17	18.1%	2,591	2,380
HOWARD	5.7%	0.0%	6.5%	$87.70	0.7%	64.3%	5.7%	$56.43	6.5%	3,545	3,219
MONTGOMERY	2.3%	3.3%	5.4%	$127.27	3.1%	66.0%	(1.0%)	$83.98	2.0%	9,549	9,549
PRINCE GEORGE`S	(1.6%)	(0.0%)	(2.9%)	$125.38	(1.4%)	61.9%	(1.6%)	$77.58	(2.9%)	10,000	9,526
QUEEN ANNE`S	6.7%	0.0%	8.2%	$104.52	1.4%	47.5%	6.7%	$49.70	8.2%	469	403
ST MARY`S	(4.6%)	0.0%	3.4%	$94.70	8.4%	51.0%	(4.6%)	$48.27	3.4%	1,017	909
TALBOT	3.1%	1.3%	5.9%	$136.38	2.7%	40.1%	1.8%	$54.70	4.5%	976	630
WASHINGTON	3.5%	4.6%	5.8%	$73.34	2.3%	48.4%	(1.0%)	$35.49	1.2%	2,178	1,910
WICOMICO	(7.0%)	(2.0%)	(2.7%)	$78.16	4.7%	42.2%	(5.2%)	$32.98	(0.7%)	1,625	1,234
WORCESTER	1.7%	(1.4%)	4.8%	$115.93	3.0%	46.9%	3.2%	$54.39	6.3%	9,250	3,639
MD REGIONS											
WESTERN REGION	1.7%	2.7%	3.1%	$77.14	1.4%	47.6%	(0.9%)	$36.74	0.5%	3,665	3,012
CAPITAL REGION	1.1%	1.3%	1.5%	$121.76	0.4%	63.9%	(0.2%)	$77.77	0.2%	21,754	21,156
CENTRAL REGION	3.9%	0.2%	4.8%	$104.61	0.8%	64.5%	3.7%	$67.50	4.6%	31,989	29,420
SOUTHERN REGION	1.6%	2.0%	3.2%	$90.05	1.6%	54.1%	(0.3%)	$48.69	1.3%	3,359	2,679
UPPER EASTERN SHORE	4.0%	2.0%	6.6%	$110.61	2.5%	44.6%	2.0%	$49.38	4.6%	3,489	2,707
LOWER EASTERN SHORE	(0.0%)	(1.5%)	3.8%	$109.13	3.8%	45.8%	1.5%	$49.96	5.4%	11,035	4,925

Source: Smith Travel Research, Inc.; County data unavailable due to small sample sizes in Caroline, Carroll, Garrett, Kent and Somerset counties. Data for these counties is included in their respective regions.

Product Analysis & Access

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

ACCESS

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

Travel Decision Maker/Target Audience Definition

Assateague Island, MD

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

The average travel party size to Maryland is two people. Twelve percent of trips in 2010 were taken with children in tow — a lower percentage than 2009. The media purchased for the spring/summer 2011 campaign targeted women both with and without children, in order to reach a wider pool of prospective travelers.

This audience is further defined by special interest in Maryland's travel products, which may include but is not limited to the Civil War and the Underground Railroad; Maryland and America's Byways; other cultural heritage programs; outdoor recreation and sporting events; and multicultural sites/events. Marketing efforts targeting multicultural audiences comprise 13 percent of all advertising, development, and sales and marketing activities.

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

USING RESEARCH TO TARGET HIGH-VALUE CUSTOMERS

The Office of Tourism has a strong partnership with the State Highway Administration's Maryland Scenic Byways program. Joint initiatives have included the production of

byway maps and guides, advertising campaigns, welcome center exhibits and international marketing.

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

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

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

Additional insight about the touring group includes:

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

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

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

The input from these focus groups will guide the development of new byways collateral materials — both printed and online — as well as an integrated marketing campaign promoting byways and the authentic experiences available on Maryland's 18 unique scenic byways.

PRIMARY FEEDER MARKETS

Marylanders have historically represented the largest number of Maryland tourists. In 2010, for instance, 32 percent of all travelers to Maryland were from within the state, compared to 13 percent from Virginia and 16 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, D.C. market (which represented 25 percent of travelers to Maryland in 2010), Baltimore (which represented 23 percent) and Philadelphia (which represented 11 percent). Outdoor billboards and bus shelters ran in May and June in Philadelphia and Washington, D.C. Internet and print media still target the broader 400-mile geography.

SECONDARY FEEDER MARKETS

However, 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 due to the increased length of stay. Therefore, OTD will continue to concentrate on building this increasingly important visitor base through sales programs and promotions, often in conjunction with Capital Region USA (CRUSA), Maryland's collaborative international marketing effort with Washington, D.C. and Virginia.

In addition, Baltimore and Maryland were in the meetings and incentive industry's spotlight when Baltimore hosted the inaugural AIBTM — The Americas Meetings & Events Exhibition and America Meetings Week, June 19–24, 2011. This event attracted more than 1,500 domestic and international meeting and incentive professionals to the state, many for the first time. The Office of Tourism co-hosted AIBTM with Visit Baltimore and 30 Maryland travel partners exhibited in a joint 50-by-45 Baltimore-Maryland Pavilion. The accompanying exposure increased the awareness of the State, and should have a very positive impact on future bookings statewide. Maryland travel partners will have additional opportunities to promote their destinations over the next two years, as AIBTM is scheduled to return in 2012 and 2013.

Competitive Analysis

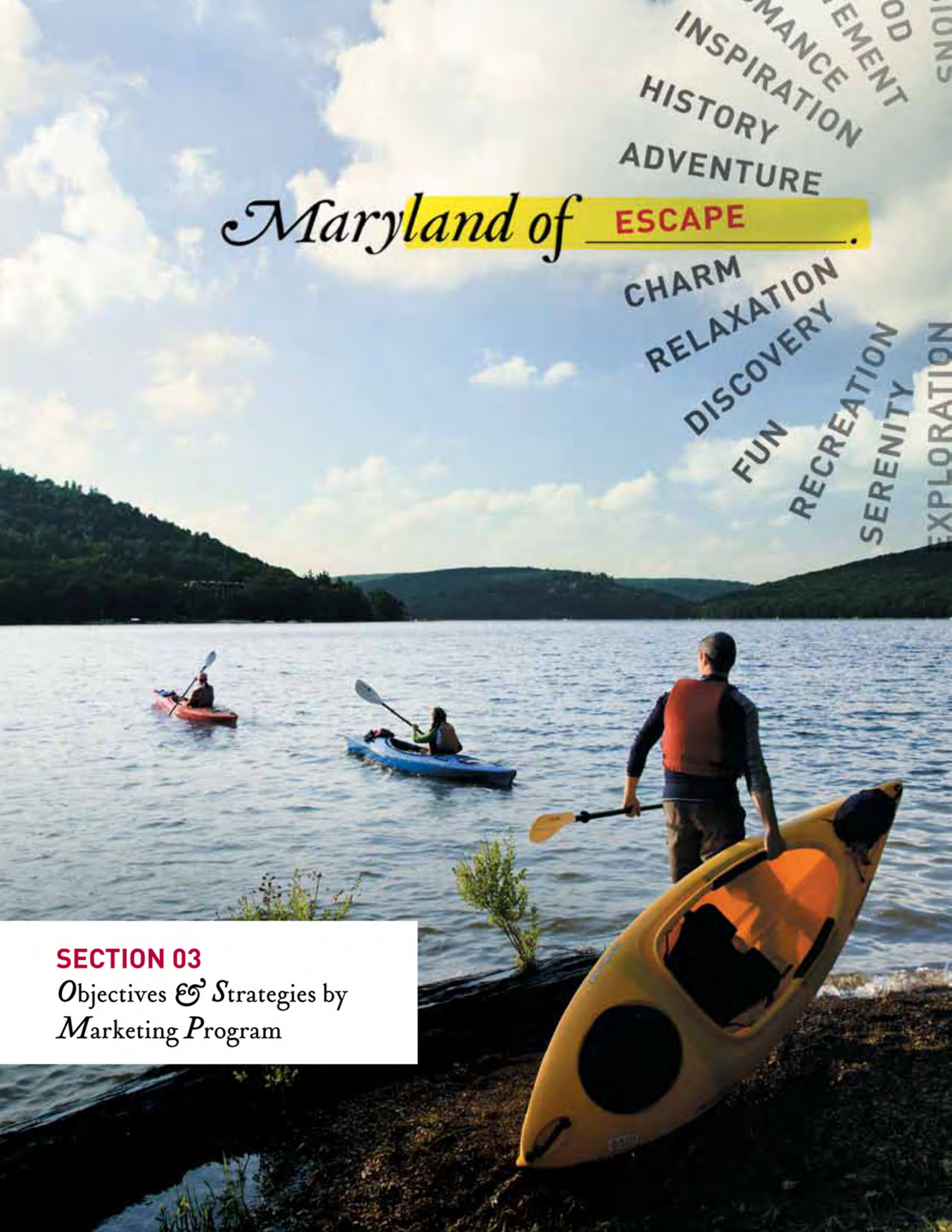
Competition for the consumer's discretionary dollar is fierce. There are many other items consumers can choose to purchase besides travel, and other marketers are outspending us.

The U.S. Travel Association reported that in 2010, tourism in the United States generated more than $758 billion in visitor spending, eight percent more than in 2010. In the race for consumer travel dollars, states spent more than $676 million funding travel marketing offices in FY 2011.

Maryland's closest regional competitors — Virginia and Pennsylvania — had budgets of $16.7 million and $10.5 million, respectively, for state tourism office funding and tourism marketing grant programs in Fiscal Year 2011. Maryland's FY 2011 budget was $9.0 million. Adjusted for inflation, FY 11's appropriated dollar amount had 48 percent less buying power for marketing Maryland's tourism assets than the FY 2001 appropriation and 31 percent less buying power than the FY 2006 appropriation.

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

The Inn at Perry Cabin



SECTION 03

*O*bjectives *&* *S*trategies by *M*arketing *P*rogram

Maryland Development Board

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

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

OBJECTIVES

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

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

KEY STRATEGIES FOR FISCAL 2012

Continue to implement the FY 10–15 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.

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

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

Office of Tourism Development
Administrative/Management

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

OBJECTIVES

Manage and monitor the OTD staff, prioritizing and balancing the workload in order to maximize efficiency and effectiveness. Ensure that sufficient staff is deployed to accomplish the mission and the recommendations of the DBED FY 12 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 2012

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

Continue to implement FY 11–15 Five Year Maryland Tourism Development Board Strategic Plan, including regional meetings to engage stakeholders in process, as well as offer technical assistance and training on marketing, product development and customer service.

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

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

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

Foster interagency cooperation between local, State and national agencies.

Communications & 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.

Special emphasis will be placed on taking advantage of the unique, time-sensitive opportunity to position Maryland as a "must-see" destination during the 2011–2015 commemoration time period.

OBJECTIVES

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

Target the highest-value prospects, based upon consumer research and economic conditions, such as the touring traveler detailed in the Travel Decision Maker/ Target Audience section on page 17.

KEY STRATEGIES FOR FISCAL 2012

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

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

Develop and run new television commercials to build awareness of Maryland as the premier location to visit during the commemoration time period; offer cooperative opportunities to DMOs and sponsors.

Promote Maryland's Scenic Byways as an ideal way for the touring traveler to experience not only commemoration events and sites, but also the variety of Maryland's destinations and authentic cultural heritage.

Visit Maryland Outdoor Board

Communications & 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 $12 million.

Continue to promote the significant impact 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 2012

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

Utilize public relations counsel to expand local, regional and national publicity efforts, including in-house speaker training.

Target both in-state media outlets and travel editorial professionals in Maryland's primary and secondary feeder markets through public relations campaigns, press outreach, familiarization tours and missions. Host 75 travel writers during the Mid-Atlantic Tourism Public Relations Media Marketplace in Solomons in September, and coordinate the pre- and post-marketplace tours for 25-30 travel writers.

Craft and launch a communications platform for the 2011-2015 commemorations period and provide promotional support for upcoming commemorations activities; develop messaging for out-of-state visitors, residents, sponsors and stakeholders.

Use commemorations as a "hook" to the travel media not only for editorial coverage of commemoration activities, but also to showcase Maryland's attractiveness and diversity as a travel destination. Use *Pride of Baltimore II's* goodwill voyage for press activities in major markets, such as Boston, New York and Washington, D.C.

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

A THANK YOU FROM ONE OF THE DOZENS OF JOURNALISTS OTD HOSTS EACH YEAR

Just wanted to send you a note thanking you both for all your help in Baltimore. We had a fantastic time, and visiting the city was a real eye-opener to how much there is to Baltimore.

It was really nice to spend time with both of you, and if you ever need any help from London, I would be only too pleased to oblige in any way I can.

– Mark Crabbie, Associate Content Editor, Frommer's Unlimited

Communications & Marketing Services

Publications

High-quality and informative print and electronic publications are designed to inspire consumers to choose Maryland as a travel destination, encourage longer stays and motivate repeat visits. This "owned" media channel allows OTD to communicate brand messaging in more detail than paid media (advertising) or earned media (public relations).

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

OBJECTIVES

Produce high-quality print and online communications vehicles that support priority visitor experiences and other marketing initiatives, such as the new Maryland's Scenic Byways printed map and guide scheduled for release in Spring 2012.

Work with commemoration partners to develop publication templates for collateral highlighting destination and event information.

Inventory and review all product development collateral to ensure proper quantities are available, updating when necessary due to new tourism product. An updated African-American Heritage Travel Guide is scheduled for release prior to the April 2012 African-American Travel Conference in Baltimore.

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

Develop strategic advertising sales opportunities for all properties — *Destination Maryland*, printed and online Calendar of Events, mobile web site, etc.

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

KEY STRATEGIES FOR FISCAL YEAR 2012

Publication	Audience	Distributed	Quantity
This Month in Maryland e-newsletter	Consumer	Monthly	Goal: 100,000
Product Development collateral	Consumer	As Needed	As Needed
Profile Sheets	Travel Trade	October 2011	500
Maryland Calendar of Events	Consumer	December 2011	150,000
African-American Heritage Travel Guide	Consumer	Spring 2012	150,000
Destination Maryland	Consumer	Spring 2012	150,000
Scenic Byways Map & Guide	Consumer	Spring 2012	150,000

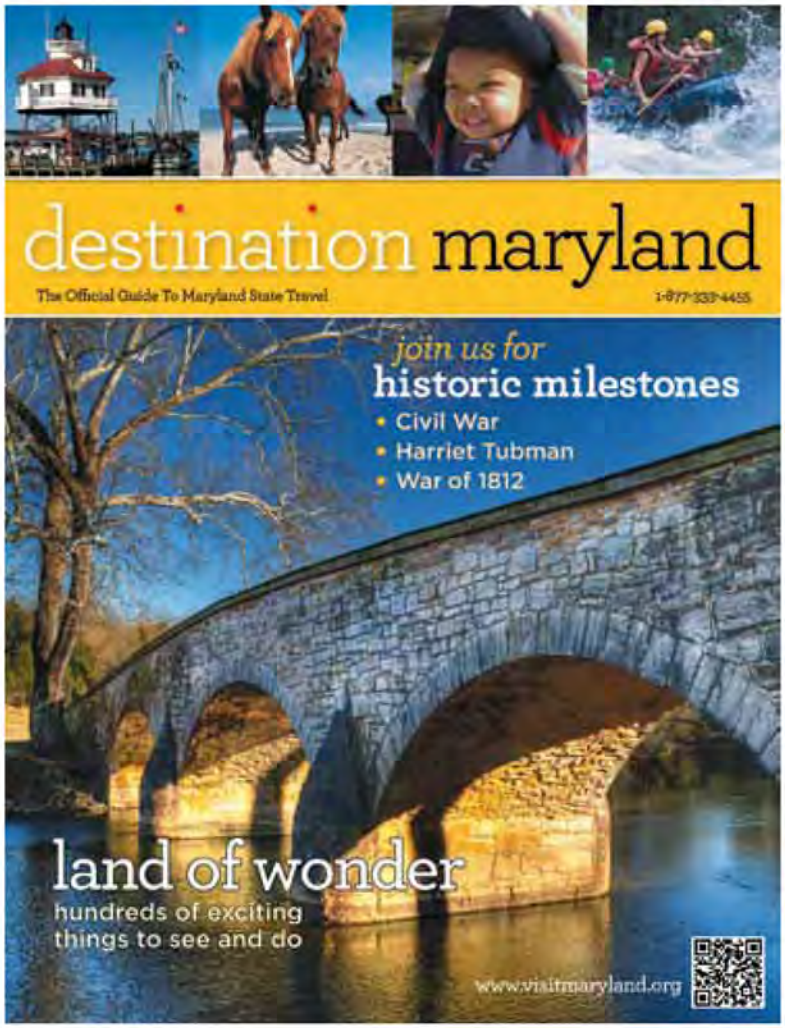
Communications & Marketing Services

Database and Fulfillment Services

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

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

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



Destination Maryland travel guide

OBJECTIVES

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

Quickly and efficiently respond to consumers who request Maryland travel information. Advertising activities generated close to 40,000 requests for travel kits in FY 11, with another 21,000 requests submitted from the VisitMaryland web site.

KEY STRATEGIES FOR FISCAL 2012

Complete outstanding issues with new "Visit Maryland" custom database of tourism assets and new "MDTrips" CRM application for web site/publications, Welcome Centers and Fulfillment/Call Center. Work with DBED IT staff and developer to resolve issues and move toward final acceptance of database.

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

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

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

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

Interactive Services

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

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

OBJECTIVES

Ensure that Maryland has the most effective consumer 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.

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

KEY STRATEGIES FOR FISCAL 2012

Continue to enhance VisitMaryland.org as a proactive consumer trip planning tool, investigating and integrating new interactive opportunities, as well as new and enhanced OTD programs. Review best practices in home page/navigation and recommend changes to reflect core marketing messages — e.g., Scenic Byways and Star-Spangled 200.

Conduct annual consumer web site effectiveness survey to refresh content and technology, as appropriate. Trip Advisor hotel reviews were added to the web site in fall 2010, due to the high level of interest shown by those surveyed in 2009. Recognizing the increasingly powerful role online traveler reviews play in the travel search-shop-buy process, OTD will expand Trip Advisor reviews to restaurant and attraction listings in FY 12.

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

Work with customer acquisition firm to grow subscriber base of monthly consumer e-newsletter, given success of FY 11 program (65 percent increase to 68,000 subscribers).

Leverage social media's potential and develop efforts that best use this relatively new tool in the marketing toolbox. Sixty-five percent of adult internet users are now using social networking sites, with YouTube now being used as a search engine for travel planning. Generate and increase video content on Maryland YouTube Channel.

Develop and coordinate robust content that is aligned with OTD priorities and/or programs (Antietam Civil War Trails mobile app, Interactive Map, Star-Spangled 200 web site.).

Develop monthly sweepstakes with statewide partners who sell Maryland experiences and promote on home page as well as via public relations, social media and advertising.

"We have gotten a great response to the Seaglass Festival on the Bay event, in thanks to the promotion on the visitmaryland.org calendar. So great in fact that we sold out within a few days of advertising. Thanks so much!"
- Heather C. Taylor, Marketing & Program Development Coordinator, Queen Anne's County Administrative Services Economic Development and Tourism

Screenshots of visitmaryland.org calendar of events advertising opportunities page

Screenshot of mobile web site

Tourism Development

Product Development Initiatives

The Tourism Development team coordinates programs that 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 the Maryland Green Travel Program for tourism businesses. Additional objectives include the promotion of Maryland's travel products via direct sales, Call Center and Welcome Centers, securing alternative funding for priority tourism initiatives, advocacy for appropriate tourism signage and management of the County Cooperative Grant Program.

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

OBJECTIVES

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

Consistently address the need for tourism signage Statewide.

Provide tourism development technical assistance to agencies and stakeholders as requested to ensure optimal visitor-ready tourism products.

KEY STRATEGIES FOR FISCAL 2012

Manage the Maryland Civil War Trails Initiative, including technical assistance for the Civil War Sesquicentennial, such as the development of the Antietam Campaign mobile app.

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

Coordinate with other State agencies on the development and marketing of the State's collection of Maryland and America's byways, including international marketing efforts in conjunction with Capital Region USA.

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

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

Coordinate with other State agencies and industry stakeholders on Phase II and III of the VisitMaryland interactive map.

Provide tourism development technical assistance as requested — e.g., Cycle Maryland, the Canal Towns and Trail Towns Programs, Maryland Heritage Areas, etc.

DBED Assistant Secretary Hannah Byron and Representative Chris Van Hollen join supporters on Capitol Hill to support legislation to create a National Park on the Eastern Shore to honor Harriet Tubman.

Tourism Development

Sustainable Tourism — the Maryland Green Travel Program

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

OBJECTIVES

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

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

Reduce environmental impacts from tourism operations.

KEY STRATEGIES FOR FISCAL 2012

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

Improve and simplify the Web-based criteria and application process for industry members to voluntarily self-certify as meeting desirable levels of sustainable practices. Launch the redesigned application as well as roll out the program to restaurants, attractions, visitor centers, marinas and campgrounds, in addition to hotels and other lodging facilities such as bed and breakfasts.

In conjunction with the launch of the new application, initiate a comprehensive and sustained outreach to public and private sector partners to ensure statewide participation in the self-certification program.

Take the Maryland Green Travel "help desk" on the road to local tourism meetings as well as offer training via conference calls or webinars.

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

Launch the Maryland Green Travel Supporting Partner pledge for Destination Marketing Organizations and other groups promising to support, promote and encourage participation in Maryland Green Travel.

Continue to promote participating facilities on the tourism web site/ publications. Develop and launch a special section on the tourism web site which highlights Maryland Green Travel partners and allows consumers to search for green facilities.

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

War of 1812 Commission

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

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

Promotional materials that accompanied *Pride of Baltimore II* during Great Lakes mission

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 2012

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

Collaborate with Star-Spangled 200, Inc., the not-for-profit 501c3 entity that supports the fundraising goals of the Maryland War of 1812 Bicentennial Commission.

Continue planning for signature events, including collaboration with the U.S. Navy, Operation Sail and Sail Baltimore on Star-Spangled Spectacular 2012, the National War of 1812 Bicentennial Launch and Festival of Naval Vessels and Tall Ships.

Enhance the Commission's web site — www.StarSpangled200.org. — with more robust content to reflect the most up-to-date and persuasive information about sites, events and partners.

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

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

Tourism Development

County Cooperative Grant Program

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

OBJECTIVES

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

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

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

KEY STRATEGIES FOR FISCAL 2012

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

Support the Maryland Tourism Development Board and the Secretary of the Department of Business and Economic Development in developing new guidelines and marketing co-operative programs for FY 2012 in recognition of the increase in allocated funds as set forth in the Tourism Promotion Act.

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

Meredith Co-op Section

Tourism Development

Customer Contact Program — Call Center & Welcome Centers

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

I-70 Welcome Center

OBJECTIVES

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

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. Engage other state, federal and county visitor centers to share best practices and marketing messages.

Manage and administer the in-house Maryland Call Center, and align with OTD marketing activities.

KEY STRATEGIES FOR FISCAL 2012

Manage, supervise, and train staff and volunteers at four Welcome Centers — I95 North, I95 South, I70 East and I70 West.

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

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

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

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

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

Conduct interactive workshops with staff from other state, federal, county and city travel information centers to share best practices and marketing messages. Continue annual customer service training, including a Maryland tourism track, for these frontline travel information center staff as well as call center staff.

Travel Trade Sales

Domestic and International Sales

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

OBJECTIVES

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

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

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

KEY STRATEGIES FOR FISCAL 2012

Coordinate the efforts to maximize the second time Baltimore will host AIBTM - The Americas Meetings & Events Exhibition, June 19–21, 2012. Collaborate with DMOs and the private sector on the Maryland Pavilion tradeshow opportunity.

Collaborate with Visit Baltimore and other state partners to maximize future sales opportunities from the African-American Travel Conference in Baltimore in April 2012.

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

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.

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

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

"Thank you for a lovely evening last night. The ship is beautiful and I look forward to bringing many groups to Baltimore for Op Sail 2012 and more."

- Marilyn Harvey, Breezy Tour & Travel Attendee at Pride of Baltimore II reception in New York City

Lt. Governor Anthony G. Brown and the Maryland-Baltimore Pavilion partners at AIBTM

Research

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

OBJECTIVES

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

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

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

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

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

KEY STRATEGIES FOR FISCAL 2012

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

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

Great Falls, Montgomery County

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

Provide ongoing research support to OTD staff, stakeholders and State agencies. In Fiscal 2012 this includes project management for the Cycle Maryland bicyclist survey.

Use visitor profile data to determine OTD's markets, trip trends and most valuable prospects on an annual basis.

Commission an advertising effectiveness study to measure revenues and jobs generated by OTD efforts. Marketing efforts historically were measured by conversion studies, which are based on lead generation from phone inquiries, reader service labels and web site requests. As the Internet is now the chief source of travel information, many consumers are no longer requesting travel information; this new study will more accurately reflect OTD's impact.

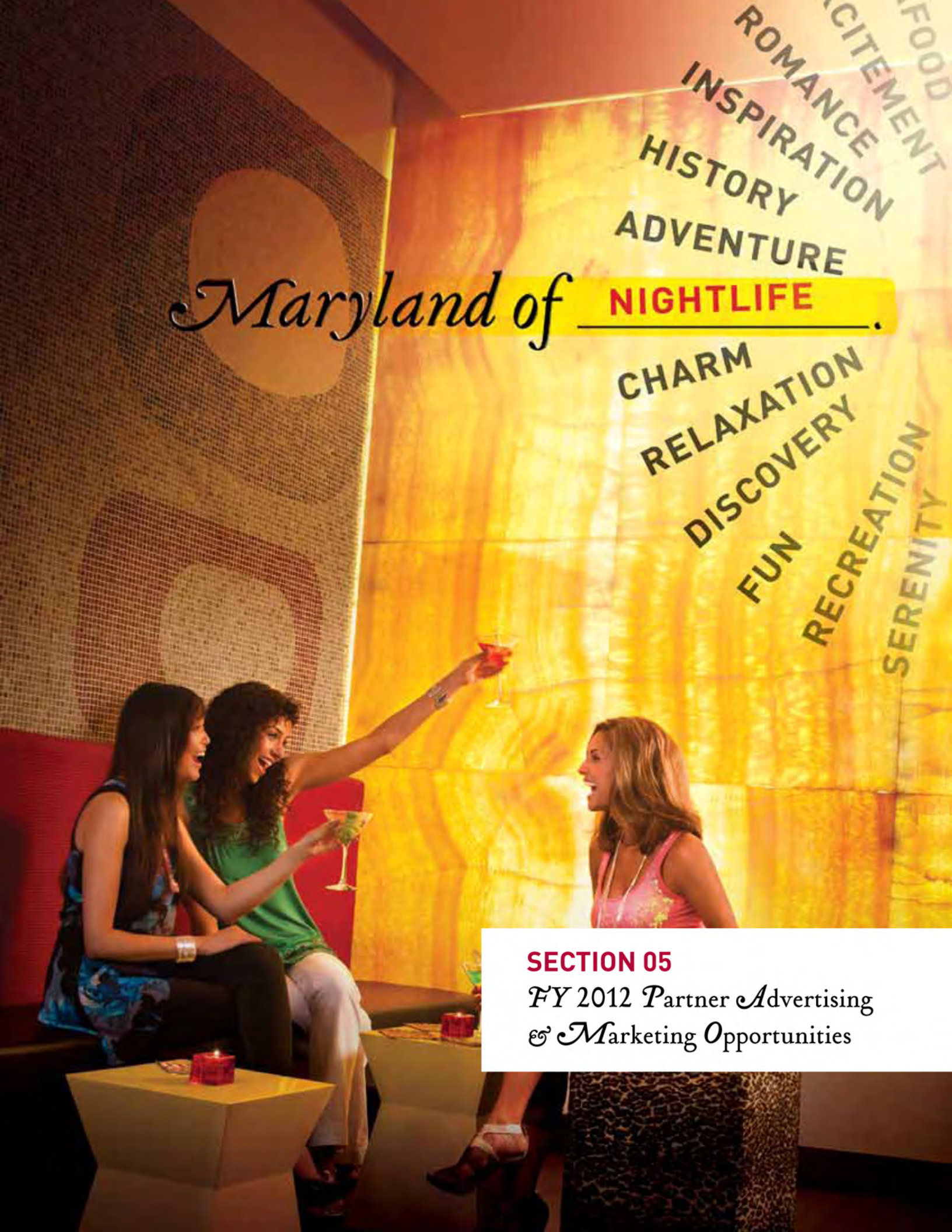
Monitor research conducted for the Capital Region USA (CRUSA).

SECTION 04

Events Calendar

DATES	EVENT	LOCATION	CONTACT
JUL. 2011			
10-14	Maryland on the Road Enterprise (MORE)	Central & Western New York	Rich Gilbert
AUG. 2011			
4	BTA-Tour Operator Fam Trade Show	Baltimore, MD	Rich Gilbert
10-12	International Motorcoach Group	Lancaster, PA	Rich Gilbert
19-23	Student Youth & Travel Association Marketplace	New York, NY	Rich Gilbert
22-24	National Scenic Byways Conference	Minneapolis, MN	Rebecca Goldman
SEP. 2011			
7-8	HSMAI Affordable Meetings National	Washington, DC	Sandy Stilling
11-14	Virginia Motorcoach Association Marketplace	Chesapeake, VA	Rich Gilbert
13-16	MATPRA Media Marketplace	Solomons, MD	Connie Yingling
19-20	NASC Market Segment Meeting	Denver, Colorado	Terry Hasseltine
21-22	SportsLink	Colorado Springs	Terry Hasseltine
22-23	AAA Central Penn Travel Counselor Training	Harrisburg & Lancaster, PA	Rich Gilbert
22-24	U.S. Olympic Assembly	Colorado Springs	Terry Hasseltine
26-28	Mini-Maryland on the Road Enterprise (Mini-MORE)	Western PA	Rich Gilbert
OCT. 2011			
2-7	TEAMS Conference & Expo	Las Vegas, Nevada	Terry Hasseltine
3-4	ABA Marketplace Advisory Committee Meeting	Grapevine, TX	Rich Gilbert
4-5	ABA Marketplace Orientation Committee Meeting	Grapevine, TX	Rich Gilbert
11	*Pride of Baltimore II* Tour Client Reception	New York, NY	Rich Gilbert
18	*Pride of Baltimore II* Tour Client Reception	Washington, DC	Rich Gilbert
21-22	Maryland State Educators Association	Ocean City, MD	Rich Gilbert
25-27	U.S. Travel Assn. Marketing Outlook Forum	Fort Worth, TX	Margot Amelia
NOV. 2011			
2-4	Maryland Tour & Travel Summit	College Park, MD	Rich Gilbert
6	OMCA-Access Marketing Buyers Reception	Windsor, ONT	Rich Gilbert
6-9	Ontario Motorcoach Marketplace	Windsor, ONT	Rich Gilbert
22	Greater New Jersey Motorcoach Association	Atlantic City, NJ	Rich Gilbert
23	HSMAI Meetings Quest	Washington, DC	Rich Gilbert
29	RESI's Economic Outlook Forum	Towson, MD	Rebecca Goldman
30-Dec. 4	USATF Annual Meeting	St. Louis, MO	Terry Hasseltine

DATES	EVENT	LOCATION	CONTACT
DEC. 2011			
4-7	U.S. Sports Congress	San Diego, CA	Terry Hasseltine
5-9	National Tour Association Marketplace	Las Vegas, NV	Rich Gilbert
JAN. 2012			
Various	National Coaches and Sports Association Mtgs	Various	Terry Hasseltine
11-14	NCAA Annual Convention	Indianapolis, IN	Terry Hasseltine
6-10	American Bus Association Marketplace	Grapevine, TX	Rich Gilbert
FEB. 2012			
4-12	Eastern Sport, Travel & Outdoor Show	Harrisburg, PA	Rich Gilbert
MAR. 2012			
TBD	United Kingdom Press Mission	Scotland, England	Camila Clark
16-18	Mason-Dixon Outdoor Writers Assoc.	Columbia, MD	Connie Yingling
19-20	Pennsylvania Bus Association Marketplace	Harrisburg, PA	Rich Gilbert
21	Maryland Motorcoach Association Marketplace	Ellicott City, MD	Rich Gilbert
APR. 2012			
16-19	NASC Sports Event Symposium	Hartford, CT	Terry Hasseltine
17	African-American Travel Conference Welcome Reception	Baltimore, MD	Rich Gilbert
18-20	African-American Travel Conference	Baltimore, MD	Rich Gilbert
21-25	International Pow Wow	Los Angeles, CA	Rich Gilbert
MAY 2012			
3-6	Pennsylvania Outdoor Writers Assoc.	Pottsville, PA	Connie Yingling
JUN. 2012			
4-8	Tourism and Travel Research Assoc. Conference	Virginia Beach, VA	Rebecca Goldman
17-19	Travel Alliance Partners (TAP Dance)	Shreveport, LA	Rich Gilbert
19-21	AIBTM	Baltimore, MD	Rich Gilbert



SECTION 05

FY 2012 Partner Advertising & Marketing Opportunities

Print Advertising Opportunities

AAA WORLD

The publication is mailed to all AAA members in the Philadelphia Metro, Harrisburg/Lancaster/York Metro & Washington, DC Metro (Northern Virginia, Suburban Maryland & DC)

- Issue Date: March/April 2012
- Space Reservation Date: 1/6/12
- Materials Due Date: 1/20/12
- Circulation: 1,891,000
- Web banner on AAAWorld.com and year-round reader service, distribution of brochures in AAA office & online events calendar

Cost to Participate:

$5,495 – 1/3 page
$2,995 – 1/6 page

Representative: Joe Fernandez
jfernandez@aaamidatlantic.com
703-222-4102

AAA World Co-op Insertion

AMERICA'S BEST VACATIONS

Full-color newspaper insert to run in CT, MD, MA, NJ, NY, OH, PA, VA, DC, WV

- Circulation: Spring Insert — 700,000
- Issue Date: Spring 2012 (April 15 or 22)
- Space Reservation Date: 2/3/12
- Materials Due Date: 2/10/12

Cost to Participate*:

$4,975 – 1/8 page
$7,900 – 1/4 page
$14,900 – 1/2 page
$21,000 – full page

*All price points include 700,000 in print circulation as well as online impressions. Online impressions vary depending on level.

Representative: Giles Roberts
groberts@collinsonmedia.com
678-987-9905

AMERICAN HERITAGE

Guide to Historic Sites in Maryland

Will consist of a minimum of 8 pages (possibly more depending on co-op participation). The guide will include writing, editing, research, permission rights, illustrations and production of the Guide

There will be approximately 45-50 destinations in the guide with an emphasis on the War of 1812. (Destinations will not be required to purchase advertising to be included).

- Issue Date: Spring 2012 (April 24, 2012)
- Space Reservation Date: 2/24/12
- Materials Due Date: 3/6/12

Cost to Participate:

$3,000 – 1/6 page 4-C
$5,400 – 1/3 page 4-C
$7,200 – 1/2 page 4-C
$10,000 – full page 4-C

Representative: Robert Jenkins
rjenkins@americanheritage.com
240-453-0900 x22

Print Advertising Opportunities

ARRIVE MAGAZINE

Exclusive onboard magazine for Amtrak's business and leisure travelers throughout the Northeast Corridor

- Minimum of a 4-page section consisting of advertising and "State Guide"
- Issue Date: May/June 2012
- Space Reservation Date: 3/20/12
- Materials Due Date: 3/23/12
- Full distribution in each seatback on Amtrak trains in the Northeast
- Circulation: 200,000

Cost to Participate:

$5,000 – full page 4-C
$2,500 – 1/2 page 4-C
$1,250 – 1/4 page 4-C

Representative: Kristi Pruitt
Kristi.pruitt@mcmurry.com
240-461-8169

GREAT VACATIONS GETAWAYS

Full-color newspaper insert to run in Greater Mid-Atlantic, Boston to Atlanta & west to Ohio

- Circulation: Spring Insert — 2,000,000
- Issue Date — Spring 2012 (April 15, 2012)
- Space Reservation Date: 2/17/12
- Materials Due Date: 2/17/12
- Direct link to advertiser web sites and strong coverage on gvginfo.com web site for Maryland

Cost to Participate:

$3,593 – 1/12 page
$7,186 – 1/6 page for spring insert

Representative: Ken Tabacca
Kent115@aol.com
410-531-2924

MEREDITH PUBLICATIONS

Multiple-page section consisting of advertising and editorial

- Circulation concentrated in CT, NY, NJ, PA, DE, MD, DC, OH
- Issue Dates: BGH (April 2012), LHJ (April 2012), Family Circle (April 2012), More (May 2012)
- Space Reservation Date: 12/6/11
- Materials Due Date: 12/6/11

Section offered in the following publications:

- Better Homes & Gardens (Circ: 1,570,000)
- Ladies Home Journal (Circ: 854,100)
- Family Circle (Circ: 516,500) — circulation in NJ, Philly/HLLY, DE, Pittsburgh, MD, NY Metro
- More (Circ: 334,000) — circulation along northeast coast DC to Maine
- Total circulation: 3,685,000

Cost to Participate:

$26,294 – 1/3 page
$11,575 – brochure ad (2 1/4 x 3")
$7,006 – 2" ad (2 1/4 x 2")

Representative: Michael DeAnzeris III
miked@strategicmediasalesgroup.com
518-580-4500

Meredith Co-op Insertion

Print Advertising Opportunities

O, THE OPRAH MAGAZINE

Full-page advertisement — 4-color

- Issue Date: May 2012
- Space Reservation Date: 1/13/12
- Materials Due Date: 1/13/12
- Circulation: 700,000 — CT, DC, DE, FL, GA, MA, MD, ME, NH, NJ, NY, NC, PA, RI, SC, VT, VA, WV

Cost to Participate:

$4,123 for 1/8 page 4-color with a maximum of 4 co-op partners

Representative: Lynn Talbert
ltalbert@maddenmedia.com
410-635-8621

Washington Post

SOUTHERN LIVING

Multiple-page section consisting of advertising and editorial

- Issue Date: March 2012
- Space Reservation Date: 11/14/11
- Materials Due Date: 11/21/11
- Circulation 365,000
- Section runs in Mid-Atlantic Region — PA, NJ, NY, DE, MD, DC, VA

Cost to Participate:

$5,100 – 1/6 page

Representative: Cynthia Cavanaugh
cavmediasales@comcast.net
410-296-7443

WASHINGTON POST

One full-page, 4-color in the Sunday Travel Section

- Issue Dates:
  4/15/12 5/13/12 6/17/12
- Space Reservation Dates:
  2/29/12 3/28/12 5/2/12
- Materials Due Dates:
  3/7/12 4/4/12 5/9/12
- 12" banner
- 1/2 page of editorial
- 1/2 page of paid advertising
- Circulation: 850,000

Cost to Participate:

$3,162 — 2 col x 4 1/4":
Limited to 6 participants per month

Representative: Ellen Gerhard
gerhard2@washpost.com
202-334-7762

Print Advertising Opportunities

WEIDER HISTORY GROUP (AMERICA'S CIVIL WAR, CIVIL WAR TIMES AND/OR AMERICAN HISTORY)

Added-Value (Based on purchasing one or more of the publications):

» Every 1/2 page or larger receives ad in one of the four Special Interest Publications (75,000 Circulation)

» Every advertiser will receive an image, 20 words of copy and link to their web site on the Heritage Travel Page

» Every 1/2 page or larger receives an ad in the Advertisers Showcase, which includes a BRC for readers

Representative: Mike Edison
saintsmarketing@optonline.net
212-628-7351

AMERICA'S CIVIL WAR

Editorial is concentrated more on the personalities and issues that caused the Civil War

» Issue Date: July 2012
(On-sale date: Early May)

» Space Reservation Date: 3/16/12

» Materials Due Date: 3/23/12

» Circulation: 37,000

Cost to Participate:

$2,250 – full page 4-C
$1,490 – 2/3 page 4-C
$1,125 – 1/2 page 4-C
$750 – 1/3 page 4-C
$395 – 1/6 page 4-C

AMERICAN HISTORY

General interest history magazine covering Americana and its history from Colonial times to the present

» Issue Date: June 2012
(On-sale date: Early April)

» Space Reservation Date: 2/8/12

» Materials Due Date: 2/15/12

» Circulation: 45,000

Cost to Participate:

$2,850 – full page 4-C
$1,885 – 2/3 page 4-C
$1,430 – 1/2 page 4-C
$950 – 1/3 page 4-C
$ 495 – 1/6 page 4-C

CIVIL WAR TIMES

Editorial includes more detail about strategy and tactics of the battles of the Civil War. Typically, there are Field Guides for their readers

» Issue Date: June 2012
(On-sale date: Early April)

» Space Reservation Date: 2/8/12

» Materials Due Date: 2/15/12

» Circulation: 54,000

Cost to Participate:

$2,950 – full page 4-C
$2,508 – 2/3 page 4-C
$1,455 – 1/2 page 4-C
$985 – 1/3 page 4-C
$499 – 1/6 page 4-C

Out-of-Home — Digital Billboards

BALTIMORE

» 4 weeks–Spring 2012

» 1/2 Rotation

» 5-6 board network — 665x/board/day

» Total # of :10-second spots — 93,100-111,720

» One image every 120 seconds

» EOI A 25-54: 4,520,277**

Cost to Participate:

» 4-week cost: $17,750-$21,300*

*Planning Costs. Total cost — will vary based on number of advertisers

**EOI - # of people who are likely to notice or read the ad on a weekly basis

Representative: Dave Battaglia
davidbattaglia@clearchannel.com
240-581-9630

PHILADELPHIA

» 4 weeks–Spring 2012

» 1/2 Rotation

» 8 board network — 625x/board/day

» Total # of :08-second spot — 140,000

» One image every 128 seconds

» EOI A 25-54: 4,522,688

Cost to Participate:

» 4-week cost: $34,965*

*Planning Costs. Total cost — will vary based on number of advertisers

Representative: Dave Battaglia
davidbattaglia@clearchannel.com
240-581-9630

WASHINGTON DC — DIGITAL BUS SHELTERS

» 4 weeks–Spring 2012

» 30 structures

» :12 seconds in length

» 1/2-spot rotation — 558,600

» EOI adults 25-54: 2,987,388

Cost to Participate:

» 4-week cost: $32,400*

*Planning Costs. Total cost — will vary based on number of advertisers

Representative: Dave Battaglia
davidbattaglia@clearchannel.com
240-581-9630

County Outdoor Co-op Advertising

Online

MADDEN MEDIA

6-week campaign–Spring 2012

Customized media plan based on geographic, demographic and/or lifestyle target

Madden Media provides creation of rich media banner advertising

- Combination of rich media and flash banners
- Use ad networks, content sites and travel sites
- Impressions: 2.8MM+

Cost to Participate:

- $6,000

Representative: Lynn Talbert
ltalbert@maddenmedia.com
410-635-8621

WASHINGTON POST

4-week campaign–Spring 2012

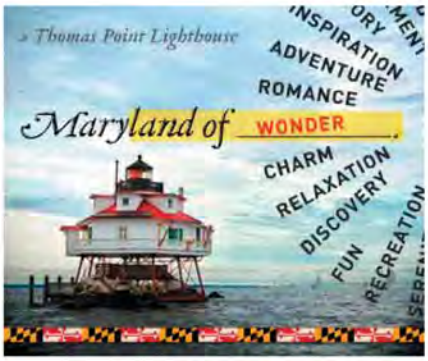
Roadblock of Lifestyle section with expanding half-page

Geo-targeted rotating banners throughout washingtonpost.com

Cost to Participate:

- $5,000
- Tile position on Maryland Office of Tourism page expanding unit in Lifestyle section — 88,000 impressions
- 400,000 ROS impressions

Representative: Joe DeMarco
Joseph.demarco@wpost.com
202-334-9708



Maryland web ads

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 4–12, 2012. 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: GROUP LEADER TRAVEL PLANNERS

Opportunity: African-American Travel Conference

Description: Maryland will be front and center at the AATC Icebreaker Reception & Dinner, as we showcase our destination to 300 travel planners on Tuesday, April 17, 2012, at the Reginald F. Lewis African-American Museum of History & Culture in Baltimore.

Cost: $500 & $1,000 sponsorship opportunities

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.

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: 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: INTERNATIONAL

Opportunity: U.S. Travel Association's International Pow Wow Show, Los Angeles, California, April 21–25

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

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

For more information, contact:
Rich Gilbert—410-767-6288;
rgilbert@visitmaryland.org.

Sales Cooperative Opportunities

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.

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.

MARKETING TARGET: MEETING & INCENTIVE PLANNERS

Opportunity: AIBTM — America's Incentive, Business Travel & Meetings

Description: Maryland will partner with Visit Baltimore, as Reed Exhibitions brings 3,000 domestic and international meeting and incentive professionals to the state. Benefits also include access to the Hosted Buyer event, Welcome Reception, sponsor recognition and shared leads. The event is in Baltimore, June 19–22, 2012.

Cost: $7,500 investment will provide dedicated spot at Maryland pavilion with dedicated appointment book

For more information, contact: Rich Gilbert—410-767-6288; rgilbert@visitmaryland.org.

Sales Cooperative Opportunities

MARKETING TARGET: AMATEUR AND PROFESSIONAL SPORTS

Opportunity: TEAM Maryland

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

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

For more information, contact: Terry Hasseltine—410-767-3373; thasseltine@MarylandSports.us.

MARKETING TARGET: STUDENT TRAVEL

Opportunity: Maryland State Educators Association (MSEA), October 21-22, 2011

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 prior to Thursday and staffing on Friday.

Cost: $150, plus travel expenses

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 Western Pennsylvania; includes approximately 15 prescheduled sales calls with operators who have the potential for day trips and overnight stays in Maryland.

Cost: $625 (includes executive motorcoach transportation and two nights' lodging)

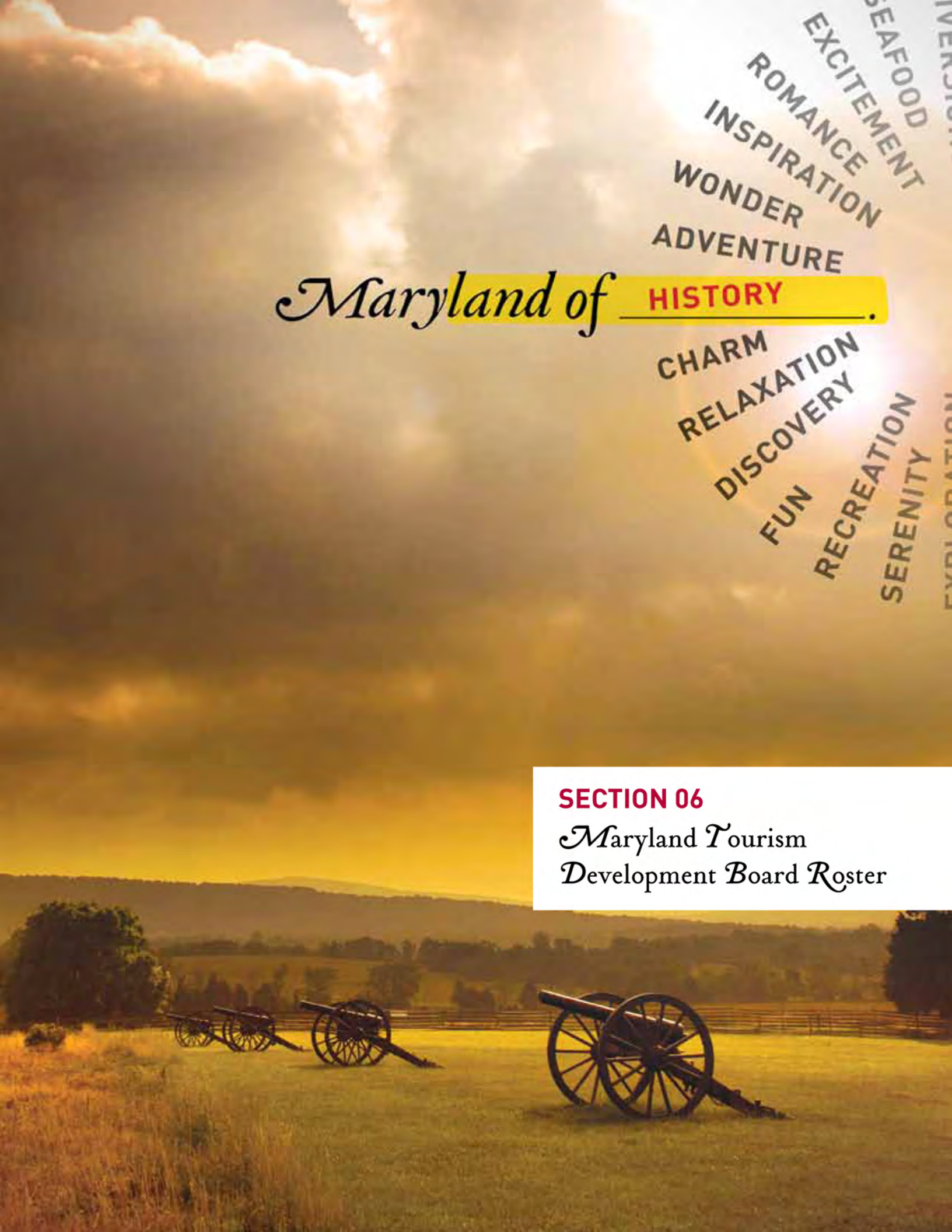
MARKETING TARGET: TOUR OPERATOR

Opportunity: Maryland on the Road Enterprise (MORE)

Description: Five-day sales blitz targeting motorcoach operators, tour operators and travel planners in Central & Western New York; includes approximately 20 prescheduled sales calls with operators who have the potential for overnight stays in Maryland.

Cost: $1,275 (includes airfare, transportation and four nights' lodging)

For more information, contact: Rich Gilbert—410-767-6288; rgilbert@visitmaryland.org.



SECTION 06

Maryland Tourism Development Board Roster

Maryland Tourism Development Board Roster

EXECUTIVE COMMITTEE

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

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

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

MR. MICHAEL E. HAYNIE
Vice Chair—Lodging
President & CEO
Parkway Hospitality Management

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

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

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

MEMBERS-AT-LARGE

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

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

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

MR. JOHN JENKINS
Managing Partner, Sydjul, LLC

MS. WINIFRED ROCHE
Tourism Manager
Harford County Office of Tourism

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

MR. VICTOR A. SULIN
Attorney at Law, Retired

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

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

MS. LINDA WESTGATE
General Manager
Hilton Baltimore

LEGISLATIVE APPOINTEES

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

THE HONORABLE
PAMELA G. BEIDLE
Delegate, District 32
Anne Arundel County

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

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

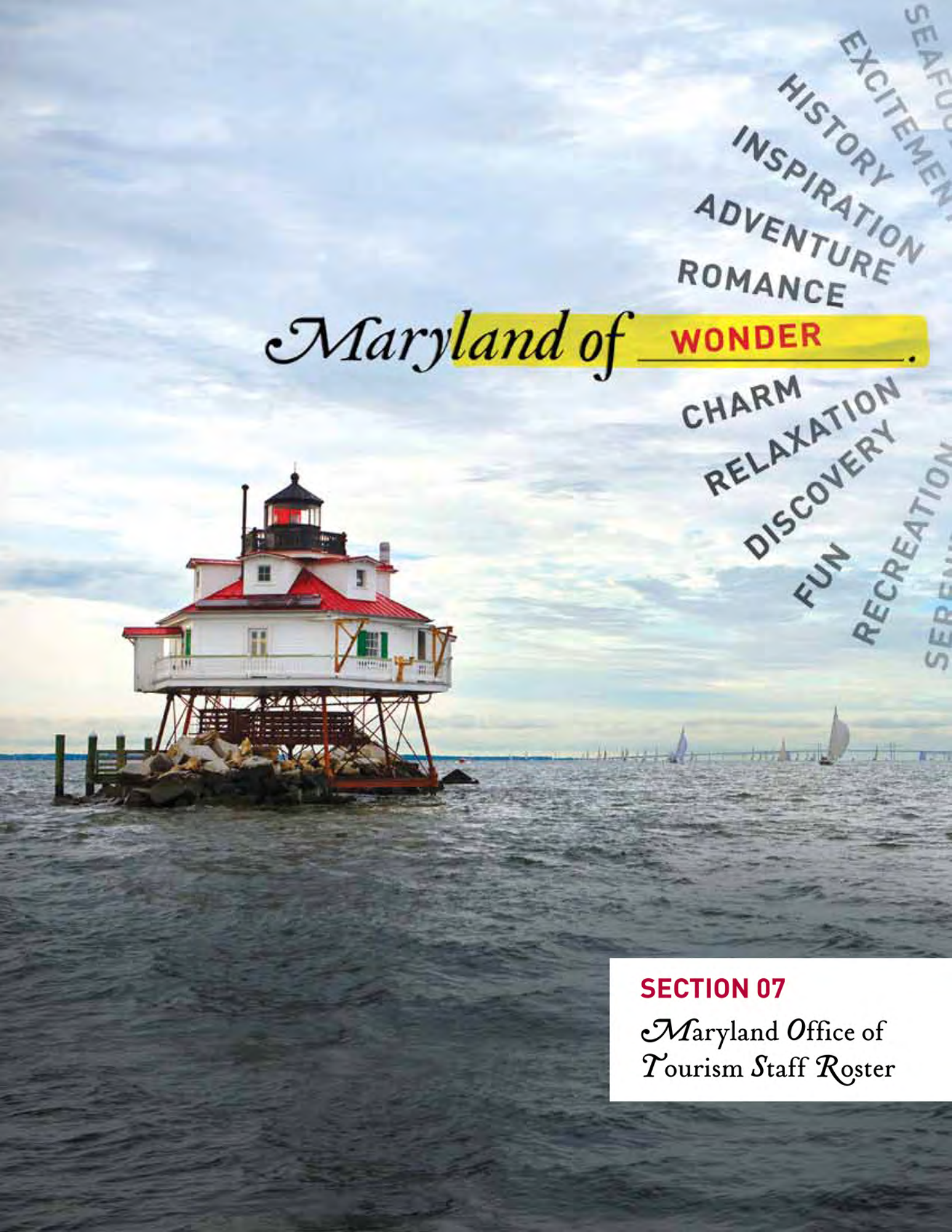
THE HONORABLE NANCY JACOBS
Senator, Maryland District 34
Cecil and Harford counties

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

OTD

MS. MARGOT AMELIA
Executive Director

MS. DENISE REED
Board Liaison



SECTION 07

Maryland Office of Tourism Staff Roster

Maryland Office of Tourism Staff Roster

DIVISION OF TOURISM, FILM AND THE ARTS

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

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

Welcome Centers

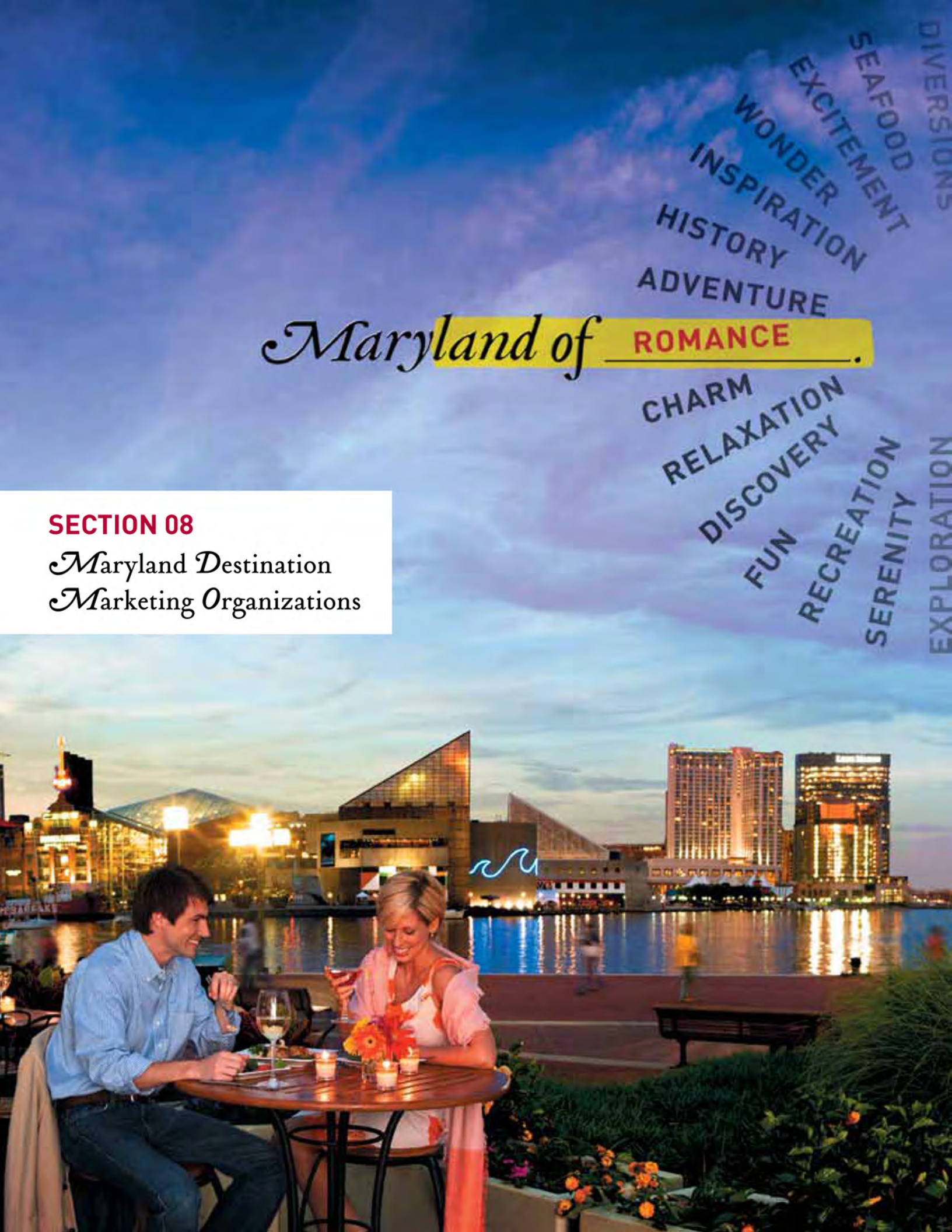
I-95 NORTH WELCOME CENTER
301-490-1333

I-95 SOUTH WELCOME CENTER
301-490-2444

I-70 EAST WELCOME CENTER
301-293-2526

I-70 WEST WELCOME CENTER
301-293-8435

Terrapin Adventures in Savage, MD



SECTION 08

Maryland Destination Marketing Organizations

ALLEGANY COUNTY

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

ANNAPOLIS/ANNE ARUNDEL COUNTY

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

BALTIMORE CITY

Visit Baltimore
100 Light Street, 12th Floor
Baltimore, MD 21202
410-659-7300
Fax: 443-817-0613
Web site: www.baltimore.org

BALTIMORE COUNTY

Baltimore County Tourism & Promotion
400 Washington Avenue
Towson, MD 21204
410-296-4886 x1; 800-570-2836
Fax: 410-337-8496
Web Site: www.enjoybaltimorecounty.com

CALVERT COUNTY

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

CAROLINE COUNTY

Caroline County Office of Tourism
10219 River Landing Road
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
410-848-1388; 800-272-1933
Fax: 410-876-1560
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; 800-CECIL-95
Fax: 866-466-7069
Web site: www.SeeCecil.org

CHARLES COUNTY

Charles County Government, Office of Tourism
200 Baltimore Street, P.O. Box 2150
La Plata, MD 20646
800-766-3386; 301-259-2500
Fax: 301-885-1311
Web site: www.charlescounty.org

DORCHESTER COUNTY

Dorchester County Tourism
2 Rose Hill Place
Cambridge, MD 21613
410-228-1000
Fax: 410-221-6545
Web site: www.tourdorchester.org

FREDERICK COUNTY

Tourism Council of Frederick
County, Inc.
151 S. East Street
Frederick, MD 21701
301-600-2888; 800-999-3613
Fax: 301-600-4044
Web site: www.fredericktourism.org

GARRETT COUNTY

Garrett County Chamber of Commerce
15 Visitors Center Drive
McHenry, MD 21541
301-387-8746
Fax: 301-387-2080
Web site: www.visitdeepcreek.com

HARFORD COUNTY

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

HOWARD COUNTY

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

KENT COUNTY

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

MONTGOMERY COUNTY

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

PRINCE GEORGE'S COUNTY

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

QUEEN ANNE'S COUNTY

Queen Anne's County Economic
Development and Tourism
425 Piney Narrows Road
Chester, MD 21619
410-604-2100
Fax: 410-604-2101
Web site: www.discoverqueenannes.com

ST. MARY'S COUNTY

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

SOMERSET COUNTY

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

TALBOT COUNTY

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

WASHINGTON COUNTY

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

WICOMICO COUNTY

Wicomico County CVB
8480 Ocean Highway
Delmar, MD 21875
410-548-4914; 800-332-TOUR
Fax: 410-341-4996
Web site: www.wicomicotourism.org

WORCESTER COUNTY

Worcester County Tourism
104 West Market Street
Snow Hill, MD 21863
410-632-3110; 800-852-0335
Fax: 410-632-3158
Web site: www.visitworcester.org

WORCESTER COUNTY (OCEAN CITY)

Ocean City Tourism/Convention Center 4001
Coastal Highway
Ocean City, MD 21842
410-723-8617; 800-626-2326
Fax: 410-289-0058
Web site: www.ococean.com

Hyatt Regency Chesapeake Bay, Cambridge

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Published by the Maryland Department of Business & Economic Development

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