

Maryland Tourism Monitor

A monthly report of Maryland travel and tourism trends as monitored by the Office of Tourism Development
Data as of September 30, 2010

Web Marketing Results

August's web site visitation was down 22 percent compared to last August, reflecting the 30 percent decrease in online advertising to date this fiscal year. More than 7,000 of the visits to *VisitMaryland.org* in August can be attributed to OTD's internet advertising and more than 2,000 requests for travel kits were received via the web site, respectively.

	August FY 2011	August FY 2010	% Change	FY 2011	FY 2010	% Change
Unique Web Users	119,597	152,781	(21.7)	303,416	338,137	(10.3)
Web Advertising Responses/ Clicks	7,205	20,370	(64.6)	31,304	42,980	(27.2)
Web Site Travel Kit Requests	2,071	2,404	(13.9)	5,920	5,583	6
Online Advertising Budget to date				\$13,790	\$19,770	(30.2)

E-newsletters

Consumer – more than 38,000 prospective visitors received the e-newsletter in August. Subscribers have declined 4 percent compared to last August.

Industry – The Division of Tourism, Film, and the Arts sent the Insights industry newsletter to more than 8,000 subscribers in August – a 1 percent decline compared to last August.

Requests for Travel Information

OTD also receives requests for travel kits in response to print, radio, and TV advertising. OTD's advertising expenditures last year reflected more than \$128,000 from the Federal Highway Administration for the cooperative Historic National Road campaign. This year, OTD's print advertising budget is down 88 percent compared to last year – with 62 percent fewer requests received. Broadcast requests have declined 1 percent for this year with a budget that was 9 percent lower for these efforts. OTD continues its annual "Maryland Minute" radio sponsorship in FY 2011, which drives prospective visitors to the VisitMaryland.org web site for more information.

ADVERTISING GENERATED REQUESTS

	August FY 2011	August FY 2010	% Change	FY 2011	FY 2010	% Change
Consumer Label Requests	1,118	3,082	(63.7)	3,202	8,464	(62.2)
Print Advertising Requests	228	463	(50.8)	414	951	(56.5)
Total Print	1,346	3,545	(62)	3,616	9,415	(61.6)
Total Print Budget				\$12,193	\$104,305	(88.3)
Broadcast (TV/Radio) Requests	323	293	10.2	620	626	(1)
Broadcast Budget				\$28,343	\$31,067	(8.8)

Welcome Centers

This August, more than 20,000 travelers visited Maryland Welcome Center locations. The two operating Welcome Centers are located on Interstate 95 and served 45 percent fewer visitors compared to last August. Due to budget constraints, Welcome Center hours and days of operation were cut back in December 2009 to 8:30 am to 4:30 pm, Thursday through Sunday.

Lodging

According to the latest data from Smith Travel Research, Inc., Maryland's lodging industry saw more demand for hotel rooms and revenue growth in August, compared to August 2009. The number of rooms sold in August grew 8.8 percent, compared to a national growth in demand of 8.3 percent. Calendar year to date, room demand grew 8.9 percent in Maryland and 7.4 percent across the country – a 1.5 point advantage for Maryland. In August, revenue from hotel rooms across the state was up 8.4 percent in Maryland compared to the national hotel room revenue growth of 9.9 percent. Calendar year to date, revenues are up 5.8 percent in Maryland, compared to a 6.3 percent growth across the U.S.

Amtrak

In August, the Amtrak train system in Maryland recorded 69,700 non-commuter arrivals, 100 more travelers than last August.

Airports

In August, BWI served 1,038,047 domestic passenger arrivals, up 5 percent compared to last August. The airport served 24,988 international arrivals, up 7 percent from last August. The number of total arrivals grew by 4.2 percent compared to last August.

Leisure and Hospitality Employment

In August, Maryland's leisure and hospitality sector continued to gain jobs for the sixth month in a row this year with growth in all subsectors, according to preliminary employment estimates from the U.S. Bureau of Labor Statistics. The number of arts, entertainment, and recreation jobs grew by 9 percent; accommodations jobs grew by 2 percent; and the

food services sub-sector added 7 percent more jobs. On a national level, the number of jobs in the leisure and hospitality sector remained steady. Arts, entertainment and recreation jobs grew by less than 1 percent; accommodations jobs grew by 2 percent; and the number of food services jobs grew slightly (0.2 percent).

	Maryland Jobs			U.S. Jobs		
	August FY 2011	August FY 2010	% Change	August FY 2011	August FY 2010	% Change
Total Leisure and Hospitality	264,900	247,900	6.9	13,774,000	13,708,000	0.5
Arts, Entertainment, Recreation	47,000	43,300	8.5	2,167,600	2,159,600	0.4
Accommodations	26,500	25,900	2.3	1,913,700	1,879,700	1.8
Food Services	191,400	178,700	7.1	9,692,200	9,668,200	0.2

Tourism Sales Taxes

Sales and use tax data is now available for July FY 2011. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed better than total sales tax collections last fiscal year, posting 5 percent growth compared to 3.4 percent growth, respectively. The Comptroller's formula also reflected a 4 percent growth in the tourism tax factor increment.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	July FY 2011 Sales Tax Collections (\$)	July FY 2010 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	4,223,205	3,787,474	11.5
901 Hotels, Motels, Apartments, Cottages	10,098,231	9,085,280	11.2
108 Restaurants, Lunchrooms, Delis WO/BWL*	25,287,291	24,224,110	4.4
112 Restaurants and Nite Clubs - W/BWL*	19,073,550	17,673,997	7.9
306 General Merchandise	9,893,585	9,197,217	7.6
407 Automobile, Bus and Truck Rentals	4,489,030	5,538,384	(19)
706 Airlines - Commercial	8,831	17,858	(50.6)
925 Recreation and Amusement Places	589,549	626,290	(5.9)
Tourism Tax Categories Subtotal	73,663,272	70,150,610	5
Sales Tax Subtotal - All Categories	323,636,512	312,936,010	3.4

TOURISM TAX FACTOR

Tax Category	Tax Factor	FY 2011 (\$)	FY 2010 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	4,223,205	3,787,474	11.5
901 Hotels, Motels, Apartments, Cottages	100%	10,098,231	9,085,280	11.2
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	8,344,806	7,993,956	4.4
112 Restaurants and Nite Clubs - W/BWL*	33%	6,294,272	5,832,419	7.9
306 General Merchandise	5%	494,679	459,861	7.6
407 Automobile, Bus and Truck Rentals	90%	4,040,127	4,984,546	(19)
706 Airlines - Commercial	50%	4,416	8,929	(50.6)
925 Recreation and Amusement Places	50%	294,775	313,145	(5.9)
Total	-	33,794,510	32,465,610	4.1

*W/BWL - includes establishments with beer, wine and liquor sales; WO/BWL - includes establishments without beer, wine and liquor sales.