

Maryland Tourism Monitor

A monthly report of Maryland travel and tourism trends as monitored by the Office of Tourism Development
Data as of December 31, 2010

Web Marketing Results

November's web site visitation was down less than one percent compared to last November, according to Webtrends analysis. More than 14,000 of the visits to VisitMaryland.org in November can be attributed to OTD's internet advertising and 980 requests for travel kits were received via the web site. This year's online advertising budget is 38 percent lower than last year's budget.

	Nov FY 2011	Nov FY 2010	% Change	FY 2011 YTD	FY 2010 YTD	% Change
Unique Web Users	85,921	86,726	(0.9)	651,662	776,425	(16.1)
Web Advertising Responses/ Clicks	14,574	9,252	57.5	109,746	142,496	(23)
Web Site Travel Kit Requests	982	1,010	(2.8)	9,847	10,570	(6.8)
Online Advertising Budget to date				\$113,615	\$183,509	(38.1)

E-newsletters

Consumer – More than 42,000 prospective visitors received the e-newsletter in November. The number of subscribers grew 14 percent compared to last November.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,000 subscribers in November – 10 percent more than last November.

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 86 percent compared to last year – with 76 percent fewer requests received. Broadcast requests have declined 12 percent for this year with a budget that is 5 percent higher than last year's 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

	Nov FY 2011	Nov FY 2010	% Change	FY 2011 YTD	FY 2010 YTD	% Change
Consumer Label Requests	876	7,915	(88.9)	6,388	26,383	(75.8)
Print Advertising Requests	62	173	(64.2)	656	1,717	(61.8)
Total Print	938	8,088	(88.4)	7,044	28,100	(74.9)
Total Print Budget				\$20,382	\$141,737	(85.6)
Broadcast (TV/Radio) Requests	105	113	(0.7)	1,036	1,172	(11.6)
Broadcast Budget				\$69,862	\$66,790	4.6

Welcome Centers

This November, more than 16,542 travelers visited Maryland Welcome Center locations. Two newly constructed OTD-operated Welcome Centers opened at South Mountain, on either side of I-70, in addition to the two OTD-operated centers located on Interstate 95 south of Baltimore. South Mountain Welcome Centers are now open Friday through Sunday, 8:30 am to 4:30 pm. The I-95 Welcome Centers are open Thursday through Sunday, 8:30 am to 4:30 pm.

Lodging

According to the latest data from Smith Travel Research, Inc., Maryland's lodging industry saw more demand for hotel rooms and revenue growth this November, compared to last November. The number of rooms sold in November grew 7.8 percent, compared to a national growth in demand of 10.5 percent. Calendar year to date, room demand grew 8.6 percent in Maryland and 7.8 percent across the country – a one point advantage for Maryland. In November, revenue from hotel rooms across the state was up 9.6 percent in Maryland compared to the national hotel room revenue growth of 13.3 percent. Calendar year to date, revenues are up 6.7 percent in Maryland, compared to a 7.6 percent growth across the U.S.

Amtrak

In November, the Amtrak train system in Maryland recorded 76,300 non-commuter arrivals – the same number of travelers recorded last year.

Airports

In November, BWI set a monthly record for passengers handled during the month. The airport served 889,139 domestic passenger arrivals – up 6.7 percent compared to last November, and 22,398 international arrivals – up 21.1 percent from last November. The number of total arrivals grew by 7 percent compared to last November.

Leisure and Hospitality Employment

In November, Maryland's leisure and hospitality sector continued to gain jobs for the ninth month in a row. Growth continued 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 6 percent; accommodations jobs grew by 1 percent; and the food services sub-sector added 4 percent

more jobs. On a national level, the number of jobs in the leisure and hospitality sector grew modestly at 1 percent. Accommodations experienced growth of 1 percent and food services saw 1.5 percent growth. U.S. arts, entertainment, and recreation jobs lost less than 1 percent of jobs, compared to last November.

	Maryland Jobs			U.S. Jobs		
	Nov FY 2011	Nov FY 2010	% Change	Nov FY 2011	Nov FY 2010	% Change
Total Leisure and Hospitality	231,300	222,200	4.1	12,929,900	12,788,100	1.1
Arts, Entertainment, Recreation	35,000	32,900	6.4	1,750,900	1,755,800	(0.3)
Accommodations	22,400	22,100	1.4	1,702,300	1,691,100	0.7
Food Services	173,900	167,200	4.0	9,476,700	9,341,200	1.5

Tourism Sales Taxes

Sales and use tax data is now available for November FY 2011. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed one point better than total sales tax collections for the first five months of the fiscal year, posting 5 percent growth compared to 4 percent growth, respectively. The Comptroller's formula also reflected a 6 percent growth in the tourism tax factor increment.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	Jul - Nov FY 2011 Sales Tax Collections (\$)	Jul - Nov FY 2010 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	19,104,683	17,372,779	10
901 Hotels, Motels, Apartments, Cottages	39,845,772	37,162,661	7.2
108 Restaurants, Lunchrooms, Delis WO/BWL*	121,337,593	120,820,589	0.4
112 Restaurants and Nite Clubs - W/BWL*	86,310,635	82,851,393	4.2
306 General Merchandise	54,431,514	53,112,511	2.5
407 Automobile, Bus and Truck Rentals	23,280,071	19,949,298	16.7
706 Airlines - Commercial	92,758	78,494	18.2
925 Recreation and Amusement Places	2,347,881	2,474,079	(5.1)
Tourism Tax Categories Subtotal	346,750,905	331,174,698	4.7
Sales Tax Subtotal - All Categories	1,598,527,763	1,543,276,452	3.6

TOURISM TAX FACTOR

Tax Category	Tax Factor	Jul - Nov FY 2011 (\$)	Jul - Nov FY 2010 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	19,104,683	17,372,779	10
901 Hotels, Motels, Apartments, Cottages	100%	39,845,772	37,162,661	7.2
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	40,445,864	40,273,530	0.4
112 Restaurants and Nite Clubs - W/BWL*	33%	28,770,212	27,617,131	4.2
306 General Merchandise	5%	2,721,576	2,655,626	2.5
407 Automobile, Bus and Truck Rentals	90%	20,952,064	17,954,368	16.7
706 Airlines - Commercial	50%	46,379	39,247	18.2
925 Recreation and Amusement Places	50%	1,173,940	1,237,040	(5.1)
Total	-	153,060,489	144,312,381	6.1

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