

# Maryland Tourism Monitor

A monthly report of Maryland travel and tourism trends as monitored by the Office of Tourism Development  
Data as of February 28, 2011

## Web Marketing Results

January's web site visitation was down one percent compared to last January, according to Webtrends analysis. More than 19,000 of the visits to VisitMaryland.org in January can be attributed to OTD's internet advertising – a growth of 62 percent – and more than 2,700 requests for travel kits were received via the web site. This year's online advertising budget is 33 percent lower than last year's budget.

	Jan FY 2011	Jan FY 2010	% Change	FY 2011 YTD	FY 2010 YTD	% Change
Unique Web Users	99,657	100,850	(1.2)	828,582	963,296	(14)
Web Advertising Responses/ Clicks	19,488	12,029	62	144,092	165,497	(12.9)
Web Site Travel Kit Requests	2,721	2,727	(0.2)	13,563	14,376	(5.7)
Online Advertising Budget to date				\$135,295	\$203,233	(33.4)

## E-newsletters

Consumer – More than 43,000 prospective visitors received the e-newsletter in January. The number of subscribers grew 16 percent compared to last January.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,500 subscribers in January – 11 percent more than last January.

## 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 83 percent compared to last year – with 71 percent fewer requests received. Broadcast requests have declined 31 percent for this year with a budget that is 16 percent higher than last year's for these efforts. OTD continues its annual "Maryland Minute" radio sponsorship in FY 2011, adding the Philadelphia market in FY 11. These spots drive prospective visitors to the VisitMaryland.org web site for travel information.

## ADVERTISING GENERATED REQUESTS

	Jan FY 2011	Jan FY 2010	% Change	FY 2011 YTD	FY 2010 YTD	% Change
Consumer Label Requests	1494	1,809	(17.4)	8,536	29,815	(71.4)
Print Advertising Requests	70	392	(82.1)	835	2,517	(66.8)
Total Print	1564	2,201	(28.9)	9,371	32,332	(71)
Total Print Budget				\$24,264	\$145,897	(83.4)
Broadcast (TV/Radio) Requests	33	232	(85.8)	1,144	1,651	(30.7)
Broadcast Budget				\$101,845	\$87,628	16.2

## Welcome Centers

This January, more than 12,000 travelers visited Maryland Welcome Center locations. Two newly constructed OTD-operated Welcome Centers are open 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 January, compared to last January. The number of rooms sold in January grew 4.1 percent, compared to a national growth in demand of 7 percent. In January, revenue from hotel rooms across the state was up 3.7 percent in Maryland compared to a similar national hotel room revenue growth of 10 percent.

## Amtrak

In January, the Amtrak train system in Maryland recorded 59,100 non-commuter arrivals – 2.5 percent fewer travelers than last January.

## Airports

In January, BWI served 745,115 domestic passenger arrivals – up 1.9 percent compared to last January, and 22,331 international arrivals – down 2.2 percent from last January. The number of total arrivals grew by 1.8 percent compared to last January.

## Leisure and Hospitality Employment

Maryland's leisure and hospitality sector experienced net job losses in January, according to preliminary employment estimates from the U.S. Bureau of Labor Statistics. While the number of Maryland arts, entertainment and recreation jobs grew by 2 percent and the number of accommodations jobs remained flat, food services jobs declined 1 percent from last

year. On a national level, the number of jobs in the leisure and hospitality sector grew modestly at 1 percent. The number of arts, entertainment, and recreation jobs declined 1 percent; accommodations jobs grew 2 percent; and the food services sub-sector added 1 percent more jobs, compared to last January.

	Maryland Jobs			U.S. Jobs		
	Jan FY 2011	Jan FY 2010	% Change	Jan FY 2011	Jan FY 2010	% Change
<b>Total Leisure and Hospitality</b>	<b>208,600</b>	<b>209,200</b>	<b>(0.3)</b>	<b>12,406,000</b>	<b>12,315,000</b>	<b>0.7</b>
Arts, Entertainment, Recreation	28,700	28,100	2.1	1,655,900	1,674,800	(1.1)
Accommodations	20,800	20,800	0	1,677,000	1,652,400	1.5
Food Services	159,100	160,300	(0.7)	9,072,900	8,987,900	0.9

## Tourism Sales Taxes

Sales and use tax data is now available for January. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed more than one point better than total sales tax collections for the first seven months of the fiscal year, posting 5 percent growth compared to 4 percent growth respectively. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller – performed twice as well as overall sales taxes, reflecting 8 percent growth.

### TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	Jul - Jan FY 2011 Sales Tax Collections (\$)	Jul - Jan FY 2010 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	23,685,600	21,487,113	10.2
901 Hotels, Motels, Apartments, Cottages	49,334,699	45,783,356	7.8
108 Restaurants, Lunchrooms, Delis WO/BWL*	166,805,118	161,924,499	3
112 Restaurants and Nite Clubs - W/BWL*	117,970,846	112,680,133	4.7
306 General Merchandise	83,110,862	81,410,069	2.1
407 Automobile, Bus and Truck Rentals	32,559,489	26,350,424	23.6
706 Airlines - Commercial	135,244	111,823	20.9
925 Recreation and Amusement Places	3,235,039	3,114,889	3.9
<b>Tourism Tax Categories Subtotal</b>	<b>476,836,898</b>	<b>452,862,306</b>	<b>5.3</b>
<b>Sales Tax Subtotal - All Categories</b>	<b>2,270,062,013</b>	<b>2,185,602,145</b>	<b>3.9</b>

### TOURISM TAX FACTOR

Tax Category	Tourism Factor	Jul - Jan FY 2011 (\$)	Jul - Jan FY 2010 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	23,685,600	21,487,113	10.2
901 Hotels, Motels, Apartments, Cottages	100%	49,334,699	45,783,356	7.8
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	55,601,706	53,974,833	3
112 Restaurants and Nite Clubs - W/BWL*	33%	39,323,615	37,560,044	4.7
306 General Merchandise	5%	4,155,543	4,070,503	2.1
407 Automobile, Bus and Truck Rentals	90%	29,303,540	23,715,382	23.6
706 Airlines - Commercial	50%	67,622	55,912	20.9
925 Recreation and Amusement Places	50%	1,617,520	1,557,445	3.9
<b>Total</b>	<b>-</b>	<b>203,089,846</b>	<b>188,204,588</b>	<b>7.9</b>

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