

Maryland Tourism Monitor

A monthly report of Maryland travel and tourism trends as monitored by the Office of Tourism Development
Data as of January 31, 2011

Web Marketing Results

December's web site visitation was down 10 percent compared to last December, according to Webtrends analysis. More than 14,000 of the visits to *VisitMaryland.org* in December can be attributed to OTD's internet advertising and nearly 1,000 requests for travel kits were received via the web site. This year's online advertising budget is 36 percent lower than last year's budget.

	Dec FY 2011	Dec FY 2010	% Change	FY 2011 YTD	FY 2010 YTD	% Change
Visitmaryland.org Unique Web Users	77,263	86,021	(10.2)	728,925	862,446	(15.5)
Web Advertising Responses/ Clicks	14,858	10,972	35.4	124,604	153,468	(18.8)
Web Site Travel Kit Requests	995	1,079	(7.8)	10,842	11,649	(6.9)
Online Advertising Budget to date				\$122,880	\$193,204	(36.4)

E-newsletters

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

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

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 74 percent fewer requests received. Broadcast requests have declined 22 percent for this year with a budget that is 12 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 more information.

ADVERTISING GENERATED REQUESTS

	Dec FY 2011	Dec FY 2010	% Change	FY 2011 YTD	FY 2010 YTD	% Change
Consumer Label Requests	654	1,623	(59.7)	7,042	28,006	(74.9)
Print Advertising Requests	109	408	(73.3)	765	2,125	(64.0)
Total Print	763	2,031	(62.4)	7,807	30,131	(74.1)
Total Print Budget				\$20,595	\$141,999	(85.5)
Broadcast (TV/Radio) Requests	75	247	(69.6)	1,111	1,419	(21.7)
Broadcast Budget				\$85,215	\$76,174	11.9

Welcome Centers

This December, more than 12,885 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 December, compared to last December. The number of rooms sold in December grew 6 percent, compared to a national growth in demand of 6.6 percent. In 2010, room demand grew 8.5 percent in Maryland and 7.7 percent across the country – a 1 point advantage for Maryland. In December, revenue from hotel rooms across the state was up 8.3 percent in Maryland compared to a similar national hotel room revenue growth of 8.6 percent. In 2010, revenues are up 6.8 percent in Maryland, compared to a 7.6 percent growth across the U.S.

Amtrak

In December, the Amtrak train system in Maryland recorded 69,900 non-commuter arrivals – 2.4 percent more travelers than last December.

Airports

In December, BWI experienced the overall busiest December in the history of BWI Marshall. The airport served 837,988 domestic passenger arrivals – up 7.3 percent compared to last December, and 22,398 international arrivals – up 13 percent from last December. The number of total arrivals grew by 7.4 percent compared to last December.

Leisure and Hospitality Employment

Maryland's leisure and hospitality sector continued to gain jobs for the tenth month in a row in December, increasing 4.8 percent from December 2009, more than twice the pace of national gains. 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 9 percent; accommodations jobs

grew by 1 percent; and the food services sub-sector added 5 percent more jobs. On a national level, the number of jobs in the leisure and hospitality sector grew modestly at 2 percent. The number of arts, entertainment, and recreation and accommodations jobs both grew by 1 percent; and the food services sub-sector added 2 percent more jobs, compared to last December.

	Maryland Jobs			U.S. Jobs		
	Dec FY 2011	Dec FY 2010	% Change	Dec FY 2011	Dec FY 2010	% Change
Total Leisure and Hospitality	228,400	217,900	4.8	12,910,700	12,690,500	1.7
Arts, Entertainment, Recreation	33,300	30,600	8.8	1,762,600	1,739,000	1.4
Accommodations	21,800	21,600	0.9	1,695,700	1,683,400	0.7
Food Services	173,300	165,700	4.6	9,452,400	9,268,100	2.0

Tourism Sales Taxes

Sales and use tax data is now available for the first half of 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 six 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 an 8 percent growth.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	Jul - Dec FY 2011 Sales Tax Collections (\$)	Jul - Dec FY 2010 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	21,797,780	19,515,970	11.7
901 Hotels, Motels, Apartments, Cottages	45,011,304	41,541,963	8.4
108 Restaurants, Lunchrooms, Delis WO/BWL*	146,442,880	141,721,660	3.3
112 Restaurants and Nite Clubs - W/BWL*	103,441,172	98,788,683	4.7
306 General Merchandise	73,561,913	72,525,556	1.4
407 Automobile, Bus and Truck Rentals	28,172,634	23,287,440	21
706 Airlines - Commercial	116,908	101,893	14.7
925 Recreation and Amusement Places	2,863,669	2,824,000	1.4
Tourism Tax Categories Subtotal	421,408,260	400,307,165	5.3
Sales Tax Subtotal - All Categories	2,002,808,504	1,926,008,942	4

TOURISM TAX FACTOR

Tax Category	Tax Factor	Jul - Dec FY 2011 (\$)	Jul - Dec FY 2010 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	21,797,780	19,515,970	11.7
901 Hotels, Motels, Apartments, Cottages	100%	45,011,304	41,541,963	8.4
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	48,814,293	47,240,553	3.3
112 Restaurants and Nite Clubs - W/BWL*	33%	34,480,391	32,929,561	4.7
306 General Merchandise	5%	3,678,095	3,626,278	1.4
407 Automobile, Bus and Truck Rentals	90%	25,355,372	20,958,696	21
706 Airlines - Commercial	50%	58,454	50,946	14.7
925 Recreation and Amusement Places	50%	1,431,834	1,412,000	1.4
Total	-	180,627,522	167,275,968	8

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