

# Maryland Tourism Monitor

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

## Web Marketing Results

October's web site visitation was down 22 percent compared to last October, according to Webtrends analysis. More than 49,000 of the visits to *VisitMaryland.org* in October can be attributed to OTD's internet advertising and more than 1,300 requests for travel kits were received via the web site, respectively. This year's online advertising budget is 40 percent lower than last year's budget.

	Oct FY 2011	Oct FY 2010	% Change	FY 2011	FY 2010	% Change
Visitmaryland.org Unique Web Users	143,356	183,153	(21.7)	565,741	689,699	(18)
Web Advertising Responses/ Clicks	49,527	52,708	(6)	95,172	133,244	(28.6)
Web Site Travel Kit Requests	1,364	1,864	(26.8)	8,865	9,560	(7.3)
Online Advertising Budget to date				\$104,857	\$173,594	(39.6)

## E-newsletters

Consumer – More than 42,000 prospective visitors received the e-newsletter in October. The number of subscribers grew 12 percent compared to last October.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,000 subscribers in October – 9 percent more than last October.

## 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 87 percent compared to last year – with 70 percent fewer requests received. Broadcast requests have declined 12 percent for this year with a budget that was slightly lower 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

	Oct FY 2011	Oct FY 2010	% Change	FY 2011	FY 2010	% Change
Consumer Label Requests	1,088	5,387	(79.8)	5,512	18,468	(70.2)
Print Advertising Requests	65	194	(66.5)	594	1,544	(61.5)
Total Print	1,153	5,581	(79.3)	6,106	20,012	(69.5)
Total Print Budget				\$16,926	\$135,050	(87.5)
Broadcast (TV/Radio) Requests	145	150	(3.3)	931	1,059	(12.1)
Broadcast Budget				\$54,579	\$55,060	(0.9)

## Welcome Centers

This October, more than 23,000 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 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 October, compared to last October. The number of rooms sold in October grew 9.9 percent, compared to a national growth in demand of 8.4 percent. Calendar year to date, room demand grew 8.8 percent in Maryland and 7.6 percent across the country – more than a one point advantage for Maryland. In October, revenue from hotel rooms across the state was up 12.8 percent in Maryland compared to the national hotel room revenue growth of 9.7 percent. Calendar year to date, revenues are up 6.7 percent in Maryland, compared to a 7.1 percent growth across the U.S.

## Amtrak

In October, the Amtrak train system in Maryland recorded 81,300 non-commuter arrivals – 7.3 percent more travelers than last October.

## Airports

In October, BWI reported a second month of record-breaking total passenger counts. The airport served 970,072 domestic passenger arrivals – up 7.5 percent compared to last October, and 24,048 international arrivals – up 22.4 percent from last October. The number of total arrivals grew by 7.8 percent compared to last October.

## Leisure and Hospitality Employment

In October, Maryland's leisure and hospitality sector continued to gain jobs for the eighth month in a row this year. 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 11 percent; accommodations jobs grew by 2 percent; and the food services sub-sector added 3 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 October.

	Maryland Jobs			U.S. Jobs		
	Oct FY 2011	Oct FY 2010	% Change	Oct FY 2011	Oct FY 2010	% Change
<b>Total Leisure and Hospitality</b>	<b>238,900</b>	<b>230,300</b>	<b>3.7</b>	<b>12,930,000</b>	<b>12,788,000</b>	<b>1.1</b>
Arts, Entertainment, Recreation	38,000	34,400	10.5	1,748,900	1,755,800	(0.4)
Accommodations	23,500	23,000	2.2	1,703,800	1,691,100	0.8
Food Services	177,400	172,900	2.6	9,476,800	9,341,200	1.5

## Tourism Sales Taxes

Sales and use tax data is now available for October FY 2011. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed better than total sales tax collections for the first four months of the fiscal year, posting 6 percent growth compared to 4 percent growth, respectively. The Comptroller's formula also reflected a 7 percent growth in the tourism tax factor increment.

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

Tax Category	Jul - Oct FY 2011 Sales Tax Collections (\$)	Jul - Oct FY 2010 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	\$15,849,019	\$14,480,335	9.5
901 Hotels, Motels, Apartments, Cottages	\$34,564,794	\$31,621,924	9.3
108 Restaurants, Lunchrooms, Delis WO/BWL*	\$100,171,683	\$96,103,439	4.2
112 Restaurants and Nite Clubs - W/BWL*	\$71,834,546	\$67,862,728	5.9
306 General Merchandise	\$42,674,904	\$40,616,478	5.1
407 Automobile, Bus and Truck Rentals	\$18,336,450	\$16,680,860	9.9
706 Airlines - Commercial	\$71,004	\$68,555	3.6
925 Recreation and Amusement Places	\$2,056,345	\$2,165,059	(5.0)
<b>Tourism Tax Categories Subtotal</b>	<b>\$285,558,745</b>	<b>\$269,599,378</b>	<b>5.9</b>
<b>Sales Tax Subtotal - All Categories</b>	<b>\$1,287,443,691</b>	<b>\$1,242,458,723</b>	<b>3.6</b>

### TOURISM TAX FACTOR

Tax Category	Tax Factor	Jul - Oct FY 2011 (\$)	Jul - Oct FY 2010 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	15,849,019	14,480,335	9.5
901 Hotels, Motels, Apartments, Cottages	100%	34,564,794	31,621,924	9.3
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	33,390,561	32,034,480	4.2
112 Restaurants and Nite Clubs - W/BWL*	33%	23,944,849	22,620,909	5.9
306 General Merchandise	5%	2,133,745	2,030,824	5.1
407 Automobile, Bus and Truck Rentals	90%	16,502,805	15,012,774	9.9
706 Airlines - Commercial	50%	35,502	34,277	3.6
925 Recreation and Amusement Places	50%	1,028,173	1,082,530	(5.0)
<b>Total</b>	<b>-</b>	<b>127,449,448</b>	<b>118,918,053</b>	<b>7.2</b>

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