

Maryland Tourism Monitor

*A monthly report of travel, trade and tourism trends in Maryland as monitored by the Office of Tourism Development
Data as of January 31, 2009*

Recognizing the importance of marketing year-round, particularly from an online standpoint, the Maryland Office of Tourism's advertising reached more than 250 percent more consumers and the number of unique visitors to visitmaryland.org increased 22 percent, compared to December 2008.

Indicators of the state of travel in Maryland are also showing resilience. Maryland's lodging industry outperformed the rest of the nation for the calendar year, even while Maryland's room supply grew at double the average national rate. Also, excluding the three Welcome Center locations that were closed for repairs, Welcome Center visitation has grown 2.5 percent this year to date. Tourism sales taxes have outperformed all sales tax categories, showing more than 28 percent more revenue growth this fiscal year to date -- emphasizing that the tourism industry remains an important revenue generator for the State.

Visitmaryland.org Unique Web Site Users

December FY09 – 68,679	FY09 to date – 561,742
December FY08 – 56,289	FY08 to date – 589,285
Percent Change – 22.0	Percent Change – (4.7)

Advertising-generated Inquiries

The Office of Tourism answered 12,247 total inquiries for more information about Maryland travel and tourism this December, an increase of 254 percent. This increase correlates to the advertising dollars expended on Google marketing in December 2009, which did not occur in December 2008.

	December FY 09	December FY 08	% Change
Web Advertising Requests	9,828	0	100.0
Consumer Label Requests	889	1,750	(49.2)
Web Site Requests	1,313	1,307	0.5
Broadcast (TV/ Radio) Requests	102	111	(8.1)
Print Advertising Requests	71	231	(69.3)
OTD 800 Number Requests	44	62	(29.0)
Total	12,247	3,461	253.9

Literature Distribution

Printed materials – 56,761 pieces of literature were distributed in December to consumers by mail and to Welcome Centers for consumption.

E-newsletter

Consumer – The monthly consumer e-newsletter, which began publication in April 2008 to highlight upcoming events throughout Maryland, reached 13,268 subscribers in December.

Industry Insights – The industry partner newsletter reached 2,927 subscribers in December, a growth of 60.1 percent from last December.

Welcome Centers

Maryland Welcome Centers served 86,148 visitors in December. Visitation is down 13.9 percent from last December and 11.9 percent for the fiscal year to date; however, the State House and I-70 locations have been closed for repairs this fiscal year. If these two locations are excluded from the total, Welcome Center visits declined 4.2 percent for December, and grew 2.3 percent for the fiscal year to date.

Lodging

According to Smith Travel Research, Inc., for Calendar Year 2008 the Maryland lodging industry outperformed the nation in overall room revenue and rooms sold, even while the state experienced double the growth in rooms available. Room demand in the state held steady with 0.7 percent growth, compared to a decline of 1.6 percent across the U.S. Room revenue grew 3.1 percent compared to national growth of 0.7 percent. This occurred even while the supply of rooms grew in Maryland by 5.6 percent – double the 2.7 percent growth for the country.

Amtrak

In December, the Amtrak train system in Maryland reported 69,700 non-commuter arrivals, a decline of 6.6 percent from last December.

Airports

BWI domestic passenger arrivals declined 4.5 percent and international arrivals declined 23.1 percent this December compared to the same period last year. In total, 759,405 passengers flew into BWI in December.

Tourism Sales Taxes

The Maryland Comptroller's Office released December's sales and use tax revenues. The following tables show tourism-related tax collections for the fiscal year to date compared to total sales tax categories, as well as in terms of the tourism tax factors stipulated in the Tourism Promotion Act. Overall, tourism-related sales tax collections for the year to date are up 18 percent over

last year's sales taxes for the same period last year, compared to 14.1 percent for all sales tax categories.

In the second table, the tourism tax factors which determine potential state tourism marketing increases are displayed at the five percent sales tax comparison. The tourism tax factor is lagging 4.3 percent behind last year's performance, for Tourism Promotion Act funds monitoring.

Tax Category	July - December FY 2009		July - December FY 2008	Actual revenue change	Change In 5% Sales Tax
	Total Receipts	5% Equivalent	Total Receipts at 5% Sales Tax		
111 Hotels, Motels Selling Food - W/BWL**	19,994,802	16,506,612	16,251,444	23.0%	1.6%
901 Hotels, Motels, Apartments, Cottages	45,362,757	37,449,005	36,993,775	22.6%	1.2%
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL**	143,851,547	118,755,950	119,977,063	19.9%	-1.0%
112 Restaurants and Nite Clubs - W/BWL**	99,429,384	82,083,448	85,924,180	15.7%	-4.5%
306 General Merchandise	66,961,495	55,279,739	54,090,490	23.8%	2.2%
407 Automobile, Bus and Truck Rentals	31,195,226	25,753,068	32,627,658	-4.4%	-21.1%
706 Airlines - Commercial	127,291	105,084	71,644	77.7%	46.7%
925 Recreation and Amusement Places	4,980,031	4,111,241	3,159,369	57.6%	30.1%
Total Tourism Tax Categories Subtotal*	411,902,533	340,044,147	349,095,622	18.0%	-2.6%
Total Sales Taxes Subtotal - All Categories	2,046,733,452	1,689,670,918	1,793,293,153	14.1%	-5.8%

TOURISM TAX FACTORS & CATEGORY GROWTH BASED ON 5% ADJUSTMENTS

CODE	Tax Factor	State Sales Tax Revenues based on 5% Sales Tax Adjustments		% Change
		July - December FY 2009	July - December FY 2008	
111 Hotels, Motels Selling Food - W/BWL**	100%	16,506,612	16,251,444	1.6%
901 Hotels, Motels, Apartments, Cottages**	100%	37,449,005	36,993,775	1.2%
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL**	33%	39,189,464	39,592,431	-1.0%
112 Restaurants and Nite Clubs - W/BWL**	33%	27,087,538	28,354,979	-4.5%
306 General Merchandise	5%	2,763,987	2,704,524	2.2%
407 Automobile, Bus and Truck Rentals	90%	23,177,761	29,364,892	-21.1%
706 Airlines - Commercial	50%	52,542	35,822	46.7%
925 Recreation and Amusement Places	50%	2,055,620	1,579,685	30.1%
Total		148,282,529	154,877,551	-4.3%

*To find total revenues, divide tourism impact 6%, multiply by .99. Multiply total revenues by 5% to get equivalent.

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