

Maryland Tourism Monitor

A monthly report of Maryland travel and tourism trends as monitored by the Office of Tourism Development

Data as of May 31, 2009

Web Marketing Results

April's internet visitation was more than double April 2008's performance, even though OTD's online advertising spending is down 28 percent year to date. More than 49,000 visits to VisitMaryland.org can be attributed to OTD's internet advertising and 2,800 requests for travel kits were received via the web site.

	April FY 09	April FY 08	% Change	FY 09 to date	FY 08 to date	% Change
Unique Web Users	175,084	85,249	105	997,247	925,416	8
Web Advertising Responses/ Clicks	49,454	20,038	147	203,372	159,521	27
Web Site Requests for Information	2,871	6,429	(55)	26,298	32,966	(20)

E-newsletters

Consumer - The number of consumers receiving the e-newsletter in April was 21,421, a 6 percent growth over the previous month as OTD staff members focus efforts on increasing this number.

Industry – The Division of Tourism, Film and the Arts increased the number of people receiving its industry newsletter, reaching 7,062 subscribers in April.

Requests for Travel Information

OTD receives requests in response to print, radio and TV advertising. This year-to date, responses to print advertising are down 17 percent; comparably, the print advertising placement budget has been reduced by nearly 14 percent. The broadcast advertising budget has declined this year to date by 24 percent. While there is a larger decline in the number of responses received directly from broadcast ads compared to last year, OTD representatives heavily market the web site during radio spots. Web visitation continues to grow compared to last year, as consumers are driven to VisitMaryland.org.

ADVERTISING GENERATED REQUESTS

	April FY 09	April FY 08	% Change	FY 09 to date	FY 08 to date	% Change
Total Print	6,905	7,319	(6)	34,141	41,187	(17)
Consumer Label Requests	6,198	6,659	(7)	31,612	36,471	(13)
Print Advertising Requests	707	660	(7)	2,529	4,716	(46)
Total Print Budget	-	-	-	438,477	506,991	(14)
Broadcast (TV/Radio) Requests	260	965	(271)	2,085	4,148	(50)
Broadcast Budget	-	-	-	348,555	457,354	(24)

Welcome Centers

Total Welcome Center visitation this year through the end of April is up to 1,202,496. Excluding the State House Welcome Center which is now managed by Maryland Archives and the I-70 locations which are temporarily closed for renovations, the Welcome Centers operating at the same capacity as last year have seen a 1 percent growth in visitation for the year to date, with a 3 percent decline from last April 2008. Youghiogheny (up 19 percent), Bay Country (up 12 percent), and U.S. 15 (up 11 percent) have seen the highest increases in visitor use this year.

Lodging

According to the latest data from Smith Travel Research, Inc., for the calendar year to date, Maryland room demand is still up 1.8 percent, while the U.S. has declined 8.1 percent – a 10 point advantage for Maryland. Maryland lodging revenues are up 1.9 points in Maryland, even while revenues have dropped 15.6 percent across the nation – a nearly 18 point advantage for Maryland. In April, Maryland room demand declined 2.5 percent, compared to a decline across the nation of 8.3 percent while total lodging revenue declined 10.1 points, compared to a 16.9 percent loss across the U.S. from last April.

Amtrak

In April, the Amtrak train system in Maryland recorded 71,100 non-commuter arrivals, a decline of 3.1 percent from the same month last year.

Airports

In April, BWI served 874,768 domestic passenger arrivals, down 3.4 percent from last April and 18,769 international arrivals, down 24.3 percent from last April.

Leisure and Hospitality Employment

April's preliminary employment estimates from the U.S. Bureau of Labor Statistics indicate that the number of jobs in the leisure and hospitality sector in Maryland declined 4.5 percent, with the greatest percent decline in the arts, entertainment, and recreation subsector.

	April 2009	April 2008	% Change
Arts, Entertainment, and Recreation Jobs	32,900	35,500	(7.3)
Accommodation Jobs	23,600	24,300	(2.9)
Food Services/Drinking Places Jobs	168,500	175,900	(4.2)
Total Leisure & Hospitality Sector Jobs	225,000	235,700	(4.5)

Tourism Sales Taxes

April sales and use tax data is available. Tourism-related codes are experiencing an 88 percent higher growth rate than overall sales tax collections for this year to date, with a 10.9 percent growth compared to a 5.8 percent growth respectively. Using the Comptroller's assumption that spending patterns slightly decreased with the sales tax increase, OTD estimates that equivalent sales in all tourism-related categories has dropped 1.5 percent and the SB 458 composite of the tourism tax factor still lags 2.5 percent behind last year's collections.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES						
Tax Category	July - April FY 2009		July - April FY 2008		Actual % Tax Revenue Change	Est. % Total Sales Change
	Total Receipts	5% Spending-Equivalent (\$)	Total Receipts (\$)	5% Spending-Equivalent (\$)		
111 Hotels, Motels Selling Food W/ BWL**	29,974,665	24,745,440	26,027,351	24,321,896	15.2	1.7
901 Hotels, Motels, Apartments, Cottages	67,679,561	55,872,535	57,171,317	53,651,247	18.4	4.1
108 Restaurants, Lunchrooms, Delis WO/BWL**	234,486,436	193,579,145	210,048,180	194,334,839	11.6	(0.4)
112 Restaurants and Nite Clubs - W/BWL**	162,034,733	133,766,991	148,628,574	137,689,490	9.0	(2.8)
306 General Merchandise	102,696,970	84,780,988	89,407,205	83,246,033	14.9	1.8
407 Automobile, Bus and Truck Rentals	49,039,504	40,484,326	52,086,376	48,691,708	(5.8)	(16.9)
706 Airlines - Commercial	182,318	150,512	172,280	154,723	5.8	(2.7)
925 Recreation and Amusement Places	6,455,096	5,328,973	4,898,551	4,595,142	31.8	16.0
Total Tourism Tax Categories Subtotal*	652,549,283	538,708,910	588,439,833	546,685,079	10.9	(1.5)
Total Sales Taxes Subtotal - All Categories	3,205,336,779	2,646,150,300	3,029,698,730	2,814,001,807	5.8	(6.0)

* To find 5% equivalent in months when sales tax is 6%, OTD divided tax revenues by 6%, multiplied by .99% then multiplied by 5%.

TOURISM TAX REVENUES & CATEGORY GROWTH BASED ON 5% ADJUSTMENTS				
CODE	Tax Factor	July - April FY 2009 (\$)	July - April FY 2008 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL**	100%	24,745,440	24,321,896	1.7
901 Hotels, Motels, Apartments, Cottages	100%	55,872,535	53,651,247	4.1
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL**	33%	63,881,118	64,130,497	(0.4)
112 Restaurants and Nite Clubs - W/BWL**	33%	44,143,107	45,437,532	(2.8)
306 General Merchandise	5%	4,239,049	4,162,302	1.8
407 Automobile, Bus and Truck Rentals	90%	36,435,893	43,822,537	(16.9)
706 Airlines - Commercial	50%	75,256	77,362	(2.7)
925 Recreation and Amusement Places	50%	2,664,487	2,297,571	16.0%
Total	-	232,056,885	237,900,944	(2.5)

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