

Maryland Tourism Monitor

A monthly report of Maryland travel and tourism trends as monitored by the Office of Tourism Development
Data as of August 31, 2010

Web Marketing Results

July's web site visitation was down less than 1 percent compared to last July. More than 24,000 of the visits to VisitMaryland.org in July can be attributed to OTD's internet advertising and more than 3,800 requests for travel kits were received via the web site – a growth of 7 percent and 21 percent respectively, compared to last July.

	July FY 2011	July FY 2010	% Change
Unique Web Users	183,819	185,356	(0.8)
Web Advertising Responses/Clicks	24,099	22,610	6.6
Web Site Travel Kit Requests	3,849	3,179	21.1
Online Advertising Budget to date	\$10,654	\$9,952	7.1

E-newsletters

Consumer – Nearly 39,000 prospective visitors received the e-newsletter in July. Subscribers have increased 6 percent compared to last July.

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

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 July, OTD's print advertising budget is down 81 percent compared to last July – with 61 percent fewer requests received. Broadcast requests declined 11 percent, reflecting a budget that was 12 percent lower 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

	July FY 2011	July FY 2010	% Change
Total Print Requests	2,270	5,870	(61.3)
Consumer Label Requests	2,084	5,382	(61.3)
Print Advertising Requests	186	488	(61.9)
Total Print Budget	\$11,752	\$60,383	(80.5)
Broadcast (TV/Radio) Requests	297	333	(10.8)
Broadcast Budget	\$12,597	\$14,388	(12.4)

Welcome Centers

This July, more than 26,000 travelers visited Maryland Welcome Center locations. The two operating Welcome Centers are located on Interstate 95 and served 8 percent fewer visitors compared to last July. Due to budget constraints, Welcome Center hours and days of operation were cut back in December 2009 to 8:30 am to 4:30 pm, Thursday through Sunday.

Lodging

According to the latest data from Smith Travel Research, Inc., Maryland's lodging industry saw more demand for hotel rooms and revenue growth in July, compared to July 2009. The number of rooms sold in July grew 10.4 percent, compared to a national growth in demand of 9 percent. Calendar year to date, room demand grew 9 percent in Maryland and 7.3 percent across the country – a nearly 2 point advantage for Maryland. In July, revenue from hotel rooms across the state was up 10.1 percent in Maryland compared to the national hotel room revenue growth of 10.5 percent. Calendar year to date, revenues are up 5.3 percent in Maryland, compared to a 5.8 percent growth across the U.S.

Amtrak

In July, the Amtrak train system in Maryland recorded 73,000 non-commuter arrivals, 2 percent more travelers compared to last July.

Airports

In July, BWI served 1,047,926 domestic passenger arrivals, up 4 percent compared to last July. The airport served 26,371 international arrivals, up 11 percent from last July. The number of total arrivals grew by 4.2 percent compared to last July.

Leisure and Hospitality Employment

In July, Maryland's leisure and hospitality sector continued to gain jobs for the fifth month in a row this year with growth in all subsectors this month, according to preliminary employment estimates from the U.S. Bureau of Labor Statistics. The number of arts, entertainment, and recreation jobs grew by 14 percent; accommodations jobs grew by 14 percent; accommodations jobs grew

by 3 percent; and the food services sub-sector added 6 percent more jobs. On a national level, the number of jobs in the leisure and hospitality sector remained steady. Arts, entertainment and recreation jobs grew by 1 percent; accommodations jobs grew by 1 percent; and the number of food services jobs declined by 0.1 percent.

	Maryland Jobs			U.S. Jobs		
	July FY 2011	July FY 2010	% Change	July FY 2011	July FY 2010	% Change
Total Leisure and Hospitality	267,700	249,200	7.4	13,799,100	13,772,800	0.2
Arts, Entertainment, Recreation	49,900	43,700	14.2	2,221,700	2,207,500	0.6
Accommodations	26,700	25,900	3.1	1,910,200	1,884,600	1.4
Food Services	191,100	179,600	6.4	9,667,200	9,680,700	(0.1)

Tourism Sales Taxes

Sales and use tax data is now available for fiscal year 2010. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed better than total sales tax collections last fiscal year, with a 1.3 percent decline compared to a 2.5 percent decline, respectively. The Comptroller's formula reflected a decline of 5 percent. Therefore, the qualifying tourism tax increment under the Tourism Promotion Act is \$0.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	FY 2010 Sales Tax Collections (\$)	FY 2009 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	38,464,876	37,837,572	1.7
901 Hotels, Motels, Apartments, Cottages	79,940,516	83,122,033	(3.8)
108 Restaurants, Lunchrooms, Delis WO/BWL*	282,210,695	286,780,117	(1.6)
112 Restaurants and Nite Clubs - W/BWL*	200,490,063	198,132,065	1.2
306 General Merchandise	136,181,217	124,894,859	9.0
407 Automobile, Bus and Truck Rentals	44,554,075	59,540,442	(25.2)
706 Airlines - Commercial	291,792	220,925	32.1
925 Recreation and Amusement Places	5,226,601	7,592,585	(31.2)
Tourism Tax Categories Subtotal	787,359,835	798,120,598	(1.3)
Sales Tax Subtotal - All Categories	3,761,859,812	3,857,926,209	(2.5)

TOURISM TAX FACTOR

Tax Category	Tax Factor	FY 2010 (\$)	FY 2009 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	38,464,876	37,837,572	1.7
901 Hotels, Motels, Apartments, Cottages	100%	79,940,516	83,122,033	(3.8)
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	94,070,232	95,593,372	(1.6)
112 Restaurants and Nite Clubs - W/BWL*	33%	66,830,021	66,044,022	1.2
306 General Merchandise	5%	6,809,061	6,244,743	9.0
407 Automobile, Bus and Truck Rentals	90%	40,098,667	53,586,398	(25.2)
706 Airlines - Commercial	50%	145,896	110,463	32.1
925 Recreation and Amusement Places	50%	2,613,300	3,796,293	(31.2)
Total	-	328,972,569	346,334,895	(5.0)

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