

# 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, 2009

## Web Marketing Results

July's web site visitation was up 107 percent compared to last July. More than 22,000 visits to *VisitMaryland.org* in July can be attributed to OTD's internet advertising and more than 3,000 requests for travel kits were received via the web site.

	July FY 10	July FY 09	% Change
<b>Unique Web Users</b>	185,356	89,706	106.6
<b>Web Advertising Responses/Clicks</b>	22,610	0	-
<b>Web Site Requests for Information</b>	3,179	3,051	4.2
<b>Online Advertising Budget</b>	\$9,952	\$0	-

## E-newsletters

Consumer - More than 36,000 prospective visitors received the e-newsletter in July, a 38 percent growth over the previous month as OTD staff members continue efforts to increase the number of subscribers. Industry – The Division of Tourism, Film, and the Arts sent the industry newsletter to more than 7,600 subscribers in July – more than 4 times the number of subscribers last July.

## Requests for Travel Information

OTD also receives requests for travel kits in response to print, radio, and TV advertising. This July, responses to print advertising rose 43 percent; comparably, the print advertising budget in July is 34 percent higher than it was last year at this time. OTD continued its annual "Maryland Minute" radio sponsorship in FY10, which drives prospective visitors to the *VisitMaryland.org* web site for more information.

## ADVERTISING GENERATED REQUESTS

	July FY 10	July FY 09	% Change
<b>Total Print</b>	<b>5,870</b>	<b>4,102</b>	<b>43.1</b>
Consumer Label Requests	5,382	3,864	39.3
Print Advertising Requests	488	238	105.0
<b>Total Print Budget</b>	<b>\$59,771</b>	<b>\$44,669</b>	<b>33.8</b>
<b>Broadcast (TV/Radio) Requests</b>	<b>333</b>	<b>339</b>	<b>(1.8)</b>
<b>Broadcast Budget</b>	<b>\$14,388</b>	<b>\$0</b>	<b>-</b>

## Welcome Centers

This July, 152,353 travelers visited Maryland Welcome Center locations. Welcome Centers that are operating in the same capacity as last July had a 9 percent decline in visitation.

## Lodging

According to the latest data from Smith Travel Research, Inc., Maryland lodging continues to outperform the country. The number of rooms sold through July has grown 0.6 percent this year, compared to a 7.5 percent loss of demand across the country – an 8 point advantage for Maryland. Revenues are down 3 percent for the year to date in Maryland compared to the national revenue loss of 15.6 percent– a 13 point advantage for Maryland.

In July, demand increased 2.3 percent in Maryland compared to last July (outperforming the nation's 4.3 percent decline), while revenue was down 3.7 percent (compared to the 13 percent decline across the U.S.).

## Amtrak

In July the Amtrak train system in Maryland recorded 71,700 non-commuter arrivals, a decline of 6.8 percent from last July.

## Airports

In July BWI served 1,006,401 domestic passenger arrivals, up 7.8 percent compared to last July. The airport served 23,844 international arrivals, down 7.9 percent from last July. Total arrivals increased by 7.4 percent compared to last July.

## Leisure and Hospitality Employment

July's preliminary employment estimates from the U.S. Bureau of Labor Statistics indicate a net growth of 1,600 jobs, or 0.6 percent, in Maryland's leisure and hospitality sector compared to July FY 2009. The food services sub-sector grew while arts, entertainment, and recreation jobs saw a 3.4 percent decline and accommodations jobs saw less than a one percent decline. On a national level, the leisure and hospitality industry had a 2.1 percent loss in net jobs. Arts, entertainment and recreation jobs dropped 3.4 percent; accommodations jobs dropped 7 percent; and food services dropped 0.8 percent.

	Maryland Jobs (thousands)			U.S. Jobs (thousands)		
	July FY 10	July FY 09	% Change	July FY 10	July FY 09	% Change
<b>Total Leisure and Hospitality</b>	<b>256.3</b>	<b>254.7</b>	<b>0.6</b>	<b>13,854</b>	<b>14,153.4</b>	<b>(2.1)</b>
Arts, Entertainment, Recreation	43.2	44.7	(3.4)	2,191.5	2,268.9	(3.4)
Accommodation	27.3	27.4	(0.4)	1,860	2,000.5	(7.0)
Food Services	185.8	182.6	1.8	9,802.5	9,884	(0.8)

## Tourism Sales Taxes

Preliminary sales and use tax data is now available for July. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed more

than twice as well as total sales tax collections this July, with a 3.2 percent decline compared to an 8.2 percent decline respectively. The SB 458 tourism tax factor lags 2.9 percent behind last year's collections.

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

Tax Category	July FY 2010 Sales Tax Collections (\$)	July FY 2009 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	3,787,473	3,614,496	4.8
901 Hotels, Motels, Apartments, Cottages	9,085,280	9,653,051	(5.9)
108 Restaurants, Lunchrooms, Delis WO/BWL*	24,224,109	24,932,144	(2.8)
112 Restaurants and Nite Clubs - W/BWL*	17,673,997	17,984,043	(1.7)
306 General Merchandise	9,197,217	9,474,577	(2.9)
407 Automobile, Bus and Truck Rentals	5,538,384	6,041,690	(8.3)
706 Airlines - Commercial	17,858	21,535	(17.1)
925 Recreation and Amusement Places	626,290	767,633	(18.4)
<b>Total – Tourism Tax Categories</b>	<b>70,150,608</b>	<b>72,489,169</b>	<b>(3.2)</b>
<b>Total – All Sales Tax Categories</b>	<b>312,936,010</b>	<b>341,070,734</b>	<b>(8.2)</b>

### TOURISM TAX REVENUES & CATEGORY GROWTH BASED ON 5% ADJUSTMENTS

Tax Category	Tax Factor	July FY 2010 (\$)	July FY 2009 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	3,787,473	3,614,496	4.8
901 Hotels, Motels, Apartments, Cottages	100%	9,085,280	9,653,051	(5.9)
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	8,074,703	8,310,715	(2.8)
112 Restaurants and Nite Clubs - W/BWL*	33%	5,891,332	5,994,681	(1.7)
306 General Merchandise	5%	459,861	473,729	(2.9)
407 Automobile, Bus and Truck Rentals	90%	16,072	19,382	(8.3)
706 Airlines - Commercial	50%	8,929	10,768	(17.1)
925 Recreation and Amusement Places	50%	313,145	383,817	(18.4)
<b>Total</b>	<b>-</b>	<b>27,636,795</b>	<b>28,460,637</b>	<b>(2.9)</b>

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