

# 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, 2009

## Web Marketing Results

October's web site visitation was up 7.3 percent compared to October 2008. More than 32,700 visits to *VisitMaryland.org* in October can be attributed to OTD's internet advertising and more than 1,800 requests for travel kits were received via the web site.

	Oct FY 10	Oct FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Unique Web Users	183,153	170,750	7.3	689,699	419,599	64.4
Web Advertising Responses/ Clicks	52,708	72,255	(27.1)	133,244	88,967	49.8
Web Site Travel Kit Requests	1,864	3,087	(39.6)	9,560	10,718	(10.8)
Online Advertising Budget				\$138,334	\$158,800	(12.9)

## E-newsletters

Consumer – More than 37,700 prospective visitors received the e-newsletter in October, a 1 percent decline compared to the previous month as OTD staff members cleanse the database.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 7,700 subscribers in October – nearly three times the number of subscribers last October.

## Requests for Travel Information

OTD also receives requests for travel kits in response to print, radio, and TV advertising. This October responses to print advertising rose 7.3 percent compared to last October. OTD's print advertising budget this year reflects nearly \$80,000 from the Federal Highway Administration for the cooperative Historic National Road campaign. OTD also 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

	Oct FY 10	Oct FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Total Print Requests	5,581	5,202	7.3	20,012	15,424	29.7
Consumer Label Requests	5,387	5,082	6	18,468	14,654	26
Print Advertising Requests	194	120	61.7	1,544	770	100.5
Total Print Budget				\$133,201	\$134,444	(1.0)
Broadcast (TV/Radio) Requests	150	209	(28.2)	1,059	1,138	(6.9)
Broadcast Budget				\$63,594	\$279,087	(77.2)

## Welcome Centers

This October, 93,451 travelers visited Maryland Welcome Center locations. The seven operating Welcome Centers experienced a 6.1 percent decline in visitation.

## Lodging

According to the latest data from Smith Travel Research, Inc., Maryland lodging continued to outperform the country. The number of rooms sold through October grew 0.6 percent this year, compared to a 6.6 percent loss of demand across the country – a 7 point advantage for Maryland. Revenues are down 4.4 percent for the year to date in Maryland compared to the national revenue loss of 15 percent– an 11 point advantage for Maryland. In October demand increased 1.6 percent in Maryland compared to last October (outperforming the nation's 3.2 percent decline), while revenue was down 6.1 percent (compared to the 11.1 percent decline across the U.S.).

## Amtrak

In October the Amtrak train system in Maryland recorded 75,800 non-commuter arrivals, a decline of 0.2 percent compared to last October.

## Airports

In October BWI served 902,808 domestic passenger arrivals, up 8.8 percent compared to last October. The airport served 19,652 international arrivals, down 0.6 percent from last October. Total arrivals increased by 8.6 percent compared to last October.

## Leisure and Hospitality Employment

October's preliminary employment estimates from the U.S. Bureau of Labor Statistics indicate a net growth of 1,300 jobs (or less than one percent) in Maryland's leisure and hospitality sector compared to October FY 2009, due to growth in the food services sector. The number of arts, entertainment, and recreation jobs

declined by 1.7 percent; accommodations jobs declined by 0.4 percent; and food services sub-sector grew by 1.6 percent. On a national level, the leisure and hospitality industry saw a 1.9 percent loss in net jobs. Arts, entertainment and recreation jobs dropped 2.5 percent; accommodations jobs dropped 7 percent; and food services dropped 0.7 percent.

	Maryland Jobs			U.S. Jobs		
	October FY 10	October FY 09	% Change	October FY 10	October FY 09	% Change
<b>Total Leisure and Hospitality</b>	<b>239,000</b>	<b>240,200</b>	<b>(0.5)</b>			<b>(1.8)</b>
Arts, Entertainment, Recreation	37,800	37,800	0	1,970,700	2,008,100	(1.9)
Accommodation	25,800	25,500	1.2	1,744,00	1,880,500	(7.3)
Food Services	175,400	176,900	(0.9)	9,635,100	9,710,200	(0.8)

## Tourism Sales Taxes

Preliminary sales and use tax data is now available for September. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed twice as well as total sales tax collections

in the first quarter of this fiscal year, with a 3.1 percent decline compared to a 7.3 percent decline respectively. The SB 458 tourism tax factor lags 6.9 percent behind last year's collections.

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

Tax Category	1st Quarter FY 2010 Sales Tax Collections (\$)	1st Quarter FY 2009 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	10,859,877	11,020,470	(1.5)
901 Hotels, Motels, Apartments, Cottages	24,838,664	26,556,809	(6.9)
108 Restaurants, Lunchrooms, Delis WO/BWL*	73,675,586	74,989,262	(1.8)
112 Restaurants and Nite Clubs - W/BWL*	52,367,109	52,949,806	(1.1)
306 General Merchandise	31,334,100	29,362,514	6.3
407 Automobile, Bus and Truck Rentals	12,990,173	16,997,846	(30.9)
706 Airlines - Commercial	58,655	81,626	(39.2)
925 Recreation and Amusement Places	1,768,546	2,478,032	(40.1)
<b>Total – Tourism Tax Categories Subtotal</b>	<b>207,892,710</b>	<b>214,436,365</b>	<b>(3.1)</b>
<b>Total Sales Tax - All Categories</b>	<b>945,362,099</b>	<b>1,020,112,058</b>	<b>(7.3)</b>

### TOURISM TAX FACTOR

Tax Category	Tax Factor	1st Quarter FY 2010 (\$)	1st Quarter FY 2009 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	10,859,877	11,020,470	(1.5)
901 Hotels, Motels, Apartments, Cottages	100%	24,838,664	26,556,809	(6.9)
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	24,558,529	24,996,421	(1.8)
112 Restaurants and Nite Clubs - W/BWL*	33%	17,455,703	17,649,935	(1.1)
306 General Merchandise	5%	1,566,705	1,468,126	6.3
407 Automobile, Bus and Truck Rentals	90%	11,691,156	15,298,061	(30.9)
706 Airlines - Commercial	50%	29,328	40,813	(39.2)
925 Recreation and Amusement Places	50%	884,273	1,239,016	(40.1)
<b>Total</b>	<b>-</b>	<b>91,884,234</b>	<b>98,269,651</b>	<b>(6.9)</b>

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