

Maryland Tourism Monitor

A monthly report of Maryland travel and tourism trends as monitored by the Office of Tourism Development
Data as of October 31, 2011

Web Marketing Results

September's web site visitation is up 28 percent compared to last September, according to Google Analytics. More than 39,000 of the visits to *VisitMaryland.org* in September can be attributed to OTD's internet advertising and more than 1,100 requests for travel kits were received via the web site. The year's online advertising budget was 188 percent greater than last year's budget.

	Sept. FY 2012	Sept. FY 2011	% Change	FY 2012 YTD	FY 2011 YTD	% Change
Unique Web Users	128,021	100,009	28	398,767	352,234	13.2
Web Advertising Responses/ Clicks	39,265	14,341	173.8	95,912	45,645	110.1
Web Site Travel Kit Requests	1,144	1,581	(27.6)	3,773	7,501	(49.7)
Online Advertising Budget to date				\$59,355	\$20,616	187.9

*OTD began to track web stats via Google Analytics in FY 2012

E-newsletters

Consumer – More than 68,000 prospective visitors received the e-newsletter in September. The number of subscribers grew 64.9 percent compared to last September.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 9,000 subscribers in September – 7.9 percent more than last September.

Requests for Travel Information

OTD also receives requests for travel kits in response to print, radio, and TV advertising. This year, OTD's print advertising budget was up 49 percent compared to the previous year; responses reflect 66 percent more requests. Broadcast requests were up 96 percent, with a year-to-budget that was 39 percent lower than last year's. OTD continued its annual "Maryland Minute" radio sponsorship in FY 2012. These spots drive prospective visitors to the *VisitMaryland.org* web site for travel information.

ADVERTISING GENERATED REQUESTS

	Sept. FY 2012	Sept. FY 2011	% Change	FY 2012 YTD	FY 2011 YTD	% Change
Consumer Label Requests	1,376	1,222	12.6	7,068	4,424	59.8
Print Advertising Requests	248	115	115.7	1,154	529	118.2
Total Print	1,624	1,337	21.5	8,222	4,953	66
Total Print Budget				\$24,588	\$16,740	48.5
Broadcast (TV/Radio) Requests	496	166	198.8	1,538	786	95.7
Broadcast Budget				\$22,653	\$37,366	(39.4)

Welcome Centers

This September, 26,667 travelers visited Maryland Welcome Center locations – two OTD-operated Welcome Centers at South Mountain, on either side of I-70, in addition to the two OTD-operated centers located on Interstate 95 south of Baltimore. South Mountain Welcome Centers were open Thursday through Sunday, 8:30 am to 4:30 pm, through the end of October. The I-95 Welcome Centers were open Wednesday through Sunday, 8:30 am to 4:30 pm, through the end of October. Beginning in November, South Mountain Welcome Centers are open Friday through Sunday, 8:30 am to 4:30 pm and I-95 Welcome Centers are open Thursday through Sunday, 8:30 am to 4:30 pm.

Lodging

According to the latest data from Smith Travel Research, Inc., Maryland's lodging industry saw more demand for hotel rooms and revenue growth this September, compared to last September. The number of rooms sold in September grew 6.8 percent compared to a national growth in demand of 6.4 percent. In September, revenue from hotel rooms across the state was up 7.6 percent in Maryland, compared to a national hotel revenue growth of 10.7 percent.

Amtrak

In September, the Amtrak train system in Maryland recorded 72,000 non-commuter arrivals – 2.1 percent more travelers than last September.

Airports

In September, BWI served 855,804 domestic passenger arrivals and 22,396 international arrivals. Total arrivals grew by 1.5 percent compared to last September.

Leisure and Hospitality Employment

Maryland's leisure and hospitality sector employment contracted by 2.5 percent compared to last September, according to preliminary employment estimates from the U.S. Bureau of Labor Statistics. The number of arts, entertainment, recreation and accommodations jobs declined

by 2 percent and food services jobs declined by 3 percent – for a net loss of 6,000 jobs. On a national level, the number of jobs in the leisure and hospitality sector grew by 1 percent. The number of arts, entertainment, and recreation sector jobs declined by 2.3 percent, while accommodations and food services added 2 percent more jobs.

	Maryland Jobs			U.S. Jobs		
	Sept. FY 2012	Sept. FY 2011	% Change	Sept. FY 2012	Sept. FY 2011	% Change
Total Leisure and Hospitality	234,500	240,500	(2.5)	13,430,200	13,303,500	1
Arts, Entertainment, Recreation	38,400	39,300	(2.3)	1,966,000	2,013,100	(2.3)
Accommodations	24,000	24,600	(2.4)	1,843,500	1,809,600	1.9
Food Services	172,100	176,600	(2.6)	9,620,700	9,480,800	1.5

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 three points better than total sales tax collections in the first quarter of fiscal year 2012, posting nearly 7 percent growth compared to more than 3 percent growth respectively. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller – reflected 5 percent growth.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	Jul - Sept. FY 2012 Sales Tax Collections (\$)	Jul - Sept. FY 2011 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	12,582,512	12,160,099	3.5
901 Hotels, Motels, Apartments, Cottages	27,651,438	26,768,990	3.3
108 Restaurants, Lunchrooms, Delis WO/BWL*	77,892,008	75,808,843	2.7
112 Restaurants and Nite Clubs - W/BWL*	62,981,940	54,860,600	14.8
306 General Merchandise	35,694,509	33,329,227	7.1
407 Automobile, Bus and Truck Rentals	17,835,580	17,404,843	2.5
706 Airlines - Commercial	89,494	49,269	81.6
925 Recreation and Amusement Places	1,729,124	1,588,103	8.9
Tourism Tax Categories Subtotal	236,456,604	221,969,973	6.5
All Categories Subtotal	1,006,142,672	970,810,904	3.6

TOURISM TAX FACTOR

Tax Category	Tourism Factor	Jul - Sept. FY 2012 (\$)	Jul - Sept. FY 2011 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	12,582,512	12,160,099	3.5
901 Hotels, Motels, Apartments, Cottages	100%	27,651,438	26,768,990	3.3
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	25,964,003	25,269,614	2.7
112 Restaurants and Nite Clubs - W/BWL*	33%	20,993,980	18,286,867	14.8
306 General Merchandise	5%	1,784,725	1,666,461	7.1
407 Automobile, Bus and Truck Rentals	90%	16,052,022	15,664,359	2.5
706 Airlines - Commercial	50%	44,747	24,635	81.6
925 Recreation and Amusement Places	50%	864,562	794,051	8.9
Total	-	105,937,989	100,635,075	5.3

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