

# Maryland Tourism Monitor

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

## Web Marketing Results

December's web site visitation was up 25 percent compared to December 2008. Nearly 11,000 visits to *VisitMaryland.org* in December can be attributed to OTD's internet advertising and more than 1,000 requests for travel kits were received via the web site.

	Dec FY 10	Dec FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Unique Web Users	86,021	68,679	25.3	862,446	561,742	53.5
Web Advertising Responses/ Clicks	10,972	9,828	11.6	153,468	109,423	40.3
Web Site Travel Kit Requests	1,079	1,313	(17.8)	11,649	13,214	(11.8)
Online Advertising Budget				\$157,943	\$176,996	(10.8)

## E-newsletters

Consumer – More than 37,000 prospective visitors received the e-newsletter in December, close to the same level of subscribers OTD had in the previous month.

Industry – The Division of Tourism, Film, and the Arts sent the Insights industry newsletter to more than 7,600 subscribers in December – more than two and a half times the number of subscribers last December.

## Requests for Travel Information

OTD also receives requests for travel kits in response to print, radio, and TV advertising. This December responses to print advertising doubled compared to last December. 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

	Dec FY 10	Dec FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Total Print Requests	2,031	960	111.6	30,131	18,574	62.2
Consumer Label Requests	1,623	889	82.6	28,006	17,671	58.5
Print Advertising Requests	408	71	474.6	2,125	903	135.3
Total Print Budget				\$139,666	\$144,146	(3.1)
Broadcast (TV/Radio) Requests	247	102	142.2	1,419	1,315	7.9
Broadcast Budget				\$76,174	\$308,996	(75.3)

## Welcome Centers

This December, 20,659 travelers visited Maryland Welcome Center locations. The four operating Welcome Centers served 42 percent fewer visitors compared to last December.

## Lodging

According to the latest data from Smith Travel Research, Inc., Maryland lodging continued to outperform the country. The number of rooms sold through December grew 1.1 percent this year, compared to a 5.8 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 14.1 percent – a 10 point advantage for Maryland. In December demand increased 6.0 percent in Maryland compared to last December (outperforming the nation's 1.1 percent growth), while revenue was down 4.7 percent (compared to the 5 percent decline across the U.S.).

## Amtrak

In December the Amtrak train system in Maryland recorded 69,900 non-commuter arrivals, 0.3 percent more travelers compared to last December.

## Airports

In December BWI served 781,288 domestic passenger arrivals, up 5.2 percent compared to last December. The airport served 19,829 international arrivals, up 20.5 percent from last December. Total arrivals increased by 5.5 percent compared to last December.

## Leisure and Hospitality Employment

December's preliminary employment estimates from the U.S. Bureau of Labor Statistics indicate a net decline of 500 jobs (or less than one percent) in Maryland's leisure and hospitality sector compared to December FY 2009. The number of arts, entertainment, and recreation jobs declined by 2.5 percent; accommodations jobs grew by

1.3 percent; and food services sub-sector remained the same. On a national level, the leisure and hospitality industry saw a 2.1 percent loss in net jobs. Arts, entertainment and recreation jobs dropped 3.5 percent; accommodations jobs dropped 4.7 percent; and food services dropped 1.3 percent.

	Maryland Jobs			U.S. Jobs		
	Decr FY 10	Dec FY 09	% Change	Decr FY 10	Dec FY 09	% Change
<b>Total Leisure and Hospitality</b>	<b>221,300</b>	<b>221,800</b>	<b>(0.2)</b>	<b>12,691,600</b>	<b>12,959,400</b>	<b>(2.1)</b>
Arts, Entertainment, Recreation	31,600	32,400	(2.5)	1,737,700	1,801,400	(3.5)
Accommodation	22,800	22,500	1.3	1,683,600	1,767,200	(4.7)
Food Services	166,900	166,900	0	9,270,300	9,390,800	(1.3)

## Tourism Sales Taxes

Preliminary sales and use tax data is now available for November. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes continue to perform more than twice as well as total

sales tax collections, with a 2.7 percent decline compared to a 6.6 percent decline respectively. The SB 458 tourism tax factor lags 6.7 percent behind last year's collections.

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

Tax Category	July-Nov FY 2010 Sales Tax Collections (\$)	July-Nov FY 2009 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	17,372,779	17,571,986	(1.1)
901 Hotels, Motels, Apartments, Cottages	37,162,661	40,104,826	(7.3)
108 Restaurants, Lunchrooms, Delis WO/BWL*	118,173,484	119,398,873	(1.0)
112 Restaurants and Nite Clubs - W/BWL*	82,851,393	83,230,484	(0.5)
306 General Merchandise	53,112,511	48,892,994	8.6
407 Automobile, Bus and Truck Rentals	19,949,298	26,445,043	(24.6)
706 Airlines - Commercial	78,494	104,989	(25.2)
925 Recreation and Amusement Places	2,474,079	4,508,528	(45.1)
<b>Tourism Tax Categories Subtotal</b>	<b>331,174,698</b>	<b>340,257,723</b>	<b>(2.7)</b>
<b>Sales Tax Subtotal - All Categories</b>	<b>1,543,276,452</b>	<b>1,653,041,771</b>	<b>(6.6)</b>

### TOURISM TAX FACTOR

Tax Category	Tax Factor	July-Nov FY 2010 (\$)	July-Nov FY 2009 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	17,372,779	17,571,986	(1.1)
901 Hotels, Motels, Apartments, Cottages	100%	37,162,661	40,104,826	(7.3)
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	39,391,161	39,799,624	(1.0)
112 Restaurants and Nite Clubs - W/BWL*	33%	27,617,131	27,743,495	(0.5)
306 General Merchandise	5%	2,655,626	2,444,650	8.6
407 Automobile, Bus and Truck Rentals	90%	17,954,368	23,800,539	(24.6)
706 Airlines - Commercial	50%	39,247	52,495	(25.2)
925 Recreation and Amusement Places	50%	1,237,040	2,254,264	(45.1)
<b>Total</b>	<b>-</b>	<b>143,430,013</b>	<b>153,771,878</b>	<b>(6.7)</b>

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