

# Maryland Tourism Monitor

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

## Web Marketing Results

February's web site visitation was up 8 percent compared to February 2009. Nearly 12,000 visits to *VisitMaryland.org* in February can be attributed to OTD's internet advertising and more than 2,500 requests for travel kits were received via the web site.

	Feb FY 10	Feb FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Unique Web Users	86,761	80,125	8.3	1,050,057	704,992	48.9
Web Advertising Responses/ Clicks	11,984	16,879	(29)	177,481	138,243	28.4
Web Site Travel Kit Requests	2,548	3,014	(15.5)	16,924	18,858	(10.3)
Online Advertising Budget				\$178,198	\$196,760	(9.4)

## E-newsletters

Consumer – More than 37,000 prospective visitors received the e-newsletter in February, which has increased 116 percent compared to February 2009.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 7,600 subscribers in February – 89 percent more than February 2009.

## Requests for Travel Information

OTD also receives requests for travel kits in response to print, radio, and TV advertising. This year responses to print advertising garnered 50 percent more responses than last year at this time and broadcast requests rose 17 percent. OTD's advertising expenditures this year reflect more than \$128,000 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

	Feb FY 10	Feb FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Total Print Requests	1,935	2,010	(3.7)	34,267	22,624	51.5
Consumer Label Requests	1,662	1,875	(11.4)	31,477	21,484	46.5
Print Advertising Requests	273	135	102.2	2,790	1,140	144.7
Total Print Budget				\$145,897	\$155,447	(6.1)
Broadcast (TV/Radio) Requests	217	144	50.7	1,868	1,597	17
Broadcast Budget				\$96,791	\$327,186	(70.4)

## Welcome Centers

This February, 16,904 travelers visited Maryland Welcome Center locations. The four operating Welcome Centers served 39 percent fewer visitors compared to last February and 17 percent fewer visitors for the fiscal year to date. 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. During February, historic snowstorms affected travel in Maryland.

## Lodging

According to the latest data from Smith Travel Research, Inc., Maryland's lodging industry spurred more demand for hotel rooms than the nation in February, while revenues in Maryland saw more of a decline compared to the nation – due to a higher decline in the state's average daily rates. The number of rooms sold in February grew 5.9 percent, compared to a national growth in demand of 3.9 percent – a 2 point advantage for Maryland. For the year to date, room demand grew 3.8 percent in Maryland and 3.2 percent across the country. In February, revenues were down 4 percent in Maryland compared to the national revenue loss of 0.8 percent – a 3 point disadvantage for Maryland. For the year to date, revenues are down 9.6 percent in Maryland, compared to a 2.7 percent loss across the U.S.

## Amtrak

In February, the Amtrak train system in Maryland recorded 54,700 non-commuter arrivals, 2.3 percent fewer travelers compared to last February. Travel was halted in the beginning of the month during two record snowstorms.

## Airports

In February, BWI served 559,674 domestic passenger arrivals, down 12.9 percent compared to last February and affected by snowstorms. The airport served 16,184 international arrivals, up 15.5 percent from last February. Total arrivals dropped by 12.3 percent compared to last February.

## Leisure and Hospitality Employment

February's preliminary employment estimates from the U.S. Bureau of Labor Statistics indicate a net loss of 2,100 jobs (one percent) in Maryland's leisure and hospitality sector compared to February FY 2009. The number of arts, entertainment, and recreation jobs declined by 2.8 percent; accommodations jobs declined by 3.7 percent; and the food services sub-sector lost 0.3 percent. Two major snowstorms

affected the State early in the month and may have exaggerated the state's job losses. On a national level, Maryland outperformed the nation, where the leisure and hospitality industry saw a 1.5 percent loss in net jobs. Arts, entertainment and recreation jobs dropped 3 percent; accommodations jobs dropped 3.7 percent; and food services dropped 0.7 percent.

	Maryland Jobs			U.S. Jobs		
	Feb FY 10	Feb FY 09	% Change	Feb FY 10	Feb FY 09	% Change
<b>Total Leisure and Hospitality</b>	<b>210,400</b>	<b>212,500</b>	<b>(1.0)</b>	<b>12,433,000</b>	<b>12,616,100</b>	<b>(1.5)</b>
Arts, Entertainment, Recreation	27,400	28,200	(2.8)	1,693,500	1,746,000	(3)
Accommodation	20,600	21,400	(3.7)	1,651,200	1,714,600	(3.7)
Food Services	162,400	162,900	(0.3)	9,088,300	9,155,500	(0.7)

## Tourism Sales Taxes

Preliminary sales and use tax data is now available for February. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes continue to outperform total sales taxes this year, with a 3.2 percent

decline compared to a 5.8 percent decline respectively. The SB 458 tourism tax factor lags 7.9 percent behind last year's collections.

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

Tax Category	July-Feb FY 2010 Sales Tax Collections (\$)	July-Feb FY 2009 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	23,552,020	24,178,978	(2.6)
901 Hotels, Motels, Apartments, Cottages	50,323,048	55,325,443	(9.0)
108 Restaurants, Lunchrooms, Delis WO/BWL*	181,236,155	185,896,259	(2.5)
112 Restaurants and Nite Clubs - W/BWL*	126,557,306	127,907,543	(1.1)
306 General Merchandise	91,075,095	83,402,358	9.2
407 Automobile, Bus and Truck Rentals	29,136,652	39,830,334	(26.8)
706 Airlines - Commercial	136,789	152,157	(10.1)
925 Recreation and Amusement Places	3,427,846	5,672,212	(39.6)
<b>Tourism Tax Categories Subtotal</b>	<b>505,444,911</b>	<b>522,365,284</b>	<b>(3.2)</b>
<b>Sales Tax Subtotal - All Categories</b>	<b>2,439,841,088</b>	<b>2,589,990,623</b>	<b>(5.8)</b>

### TOURISM TAX FACTOR

Tax Category	Tax Factor	July-Feb FY 2010 (\$)	July-Feb FY 2009 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	23,552,020	24,178,978	(2.6)
901 Hotels, Motels, Apartments, Cottages	100%	50,323,048	55,325,443	(9.0)
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	60,412,052	61,965,420	(2.5)
112 Restaurants and Nite Clubs - W/BWL*	33%	42,185,769	42,635,848	(1.1)
306 General Merchandise	5%	4,553,755	4,170,118	9.2
407 Automobile, Bus and Truck Rentals	90%	26,222,987	35,847,301	(26.8)
706 Airlines - Commercial	50%	68,395	76,079	(10.1)
925 Recreation and Amusement Places	50%	1,713,923	2,836,106	(39.6)
<b>Total</b>	<b>-</b>	<b>209,031,948</b>	<b>227,035,291</b>	<b>(7.9)</b>

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