

Maryland Tourism Monitor

A monthly report of Maryland travel and tourism trends as monitored by the Office of Tourism Development

Data as of June 30, 2009

Web Marketing Results

May's web site visitation was up 71 percent compared to last May, even though OTD's online advertising spending is down 16 percent for the year to date. More than 87,000 visits to VisitMaryland.org in May can be attributed to OTD's internet advertising and 4,900 requests for travel kits were received via the web site.

	May FY 09	May FY 08	% Change	FY 09 to date	FY 08 to date	% Change
Unique Web Users	245,996	144,054	71	1,243,243	1,069,470	16
Web Advertising Responses/ Clicks	87,629	38,053	130	291,001	197,574	47
Web Site Requests for Information	4,903	1,284	282	31,201	34,250	(9)

E-newsletters

Consumer - More than 25,000 prospective visitors received the e-newsletter in May, an 18.5 percent growth over the previous month as OTD staff members focus efforts on increasing this number.

Industry - The Division of Tourism, Film and the Arts increased subscribers to its industry newsletter to 8,850 in May - more than five times the number of subscribers last year at this time.

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. This year-to-date, responses to print advertising are down 18 percent; comparably, the print advertising placement budget has been reduced by more than 22 percent. The broadcast advertising budget has been reduced this year to date by 57 percent, correlating to inquiries also being down 57 percent. All advertising drives prospective visitors to the VisitMaryland.org web site for more information.

ADVERTISING GENERATED REQUESTS

	May FY 09	May FY 08	% Change	FY 09 to date	FY 08 to date	% Change
Total Print	11,914	14,678	(19)	46,057	55,858	(18)
Consumer Label Requests	11,256	14,310	(7)	42,869	50,777	(16)
Print Advertising Requests	658	368	7	3,188	5,081	(37)
Total Print Budget	-	-	-	\$535,690	\$689,240	(22)
Broadcast (TV/Radio) Requests	242	1,259	(73)	2,327	5,407	(57)
Broadcast Budget	-	-	-	\$457,202	\$1,056,509	(57)

Welcome Centers

More than 1.3 million travelers visited Maryland Welcome Centers this fiscal year through May. Welcome Centers that operate on the same capacity as last year have seen a very slight (0.24 percent) growth in visitation for the year to date, with a 5.4 percent decline from May 2008.

Lodging

According to the latest data from Smith Travel Research, Inc., for the calendar year to date (January - May), Maryland room demand is up 0.3 percent, while the U.S. has declined 8.3 percent - more than an 8 point advantage for Maryland. Maryland lodging revenues are down 2 percent for the year to date, while revenues have decreased 16 percent across the nation - a 14 point advantage for Maryland. In May, Maryland room demand declined 4 percent from last May (still outperforming the nation's 9 percent decline), and Maryland lodging revenue declined 12 percent (compared to an 18 percent decline across the U.S.).

Amtrak

In May, the Amtrak train system in Maryland recorded 73,600 non-commuter arrivals, a decline of 11 percent from last May. The year-to-date ridership lags 5 percent.

Airports

In May, BWI served 904,177 domestic passenger arrivals, down 3 percent from last May and 21,761 international arrivals, down 11 percent from last May.

Leisure and Hospitality Employment

May's preliminary employment estimates from the U.S. Bureau of Labor Statistics indicate that the number of jobs in the leisure and hospitality sector in Maryland declined 3.6 percent from May 2008. Maryland's job market losses in May compare favorably to the national declines in the arts/entertainment/recreation, and accommodations subsectors. However, food service jobs are being lost in Maryland at a greater rate than the national 0.9 percent loss.

	Maryland			U.S.		
	May-09	May-08	% Change	May-09	May-08	% Change
Total Leisure and Hospitality	238,000	246,800	(3.6)	13,376,600	13,720,500	(2.5)
Arts, Entertainment, Recreation	38,500	39,900	(3.5)	1,972,800	2,060,100	(4.2)
Accommodation	24,800	25,600	(3.1)	1,715,500	1,879,700	(8.7)
Food Services	174,700	181,300	(3.6)	9,688,300	9,780,700	(0.9)

Tourism Sales Taxes

Preliminary sales and use tax data is available for May. Tourism-related codes are performing twice as well as overall sales tax collections for this year to date, with a 9.9 percent growth compared to a 4.6 percent growth respectively. Using the Comptroller's assumption that consumer spending patterns slightly decreased with the sales tax increase in January 2008, OTD estimates that equivalent sales in all tourism-related categories have dropped 1.2 percent and the SB 458 composite of the tourism tax factor still lags 2.2 percent behind last year's collections.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES						
Tax Category	July - May FY 2009		July - May FY 2008		Actual % Tax Revenue Change	Est. % Total Sales Change
	Total Receipts (\$)	5% Spending-Equivalent (\$)	Total Receipts (\$)	5% Spending-Equivalent (\$)		
111 Hotels, Motels Selling Food W/ BWL**	33,715,436	27,833,615	29,569,721	27,246,283	14.0	2.2
901 Hotels, Motels, Apartments, Cottages	75,034,321	61,944,221	64,185,385	59,441,677	16.9	4.2
108 Restaurants, Lunchrooms, Delis WO/BWL**	258,883,685	213,720,176	234,041,984	214,142,808	10.6	(0.2)
112 Restaurants and Nite Clubs - W/BWL**	179,989,051	148,589,092	166,388,894	152,351,436	8.2	(2.5)
306 General Merchandise	112,156,507	92,590,263	98,468,447	90,726,498	13.9	2.1
407 Automobile, Bus and Truck Rentals	53,930,770	44,522,287	57,741,072	53,359,915	(6.6)	(16.6)
706 Airlines - Commercial	199,620	164,795	191,802	170,840	4.1	(3.5)
925 Recreation and Amusement Places	6,953,208	5,740,187	5,394,914	5,004,913	28.9	14.7
Total Tourism Tax Categories Subtotal*	720,862,598	595,104,637	655,982,218	602,444,369	9.9	(1.2)
Total Sales Taxes Subtotal - All Categories	3,513,122,497	2,900,241,314	3,359,900,775	3,086,598,511	4.6	(6.0)

* To find 5% equivalent in months when sales tax is 6%, OTD divided tax revenues by 6%, multiplied by .99% then multiplied by 5%.

TOURISM TAX REVENUES & CATEGORY GROWTH BASED ON 5% ADJUSTMENTS				
CODE	Tax Factor	July - May FY 2009 (\$)	July - May FY 2008 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL**	100%	27,833,615	27,246,283	2.2
901 Hotels, Motels, Apartments, Cottages	100%	61,944,221	59,441,677	4.2
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL**	33%	70,527,658	70,667,126	(0.2)
112 Restaurants and Nite Clubs - W/BWL**	33%	49,034,400	50,275,974	(2.5)
306 General Merchandise	5%	4,629,513	4,536,325	2.1
407 Automobile, Bus and Truck Rentals	90%	40,070,058	48,023,924	(16.6)
706 Airlines - Commercial	50%	82,398	85,420	(3.5)
925 Recreation and Amusement Places	50%	2,870,094	2,502,456	14.7
Total	-	256,991,958	262,779,185	(2.2)

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