

Maryland Tourism Monitor

A monthly report of Maryland travel and tourism trends as monitored by the Office of Tourism Development
Data as of February 28, 2010

Web Marketing Results

January's web site visitation was up nearly 60 percent compared to last January 2009. More than 12,000 visits to *VisitMaryland.org* in January can be attributed to OTD's internet advertising and more than 2,700 requests for travel kits were received via the web site.

	Jan FY 10	Jan FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Unique Web Users	100,850	63,125	59.8	963,296	624,867	54.2
Web Advertising Responses/ Clicks	12,029	11,941	0.7	165,497	121,364	36.4
Web Site Travel Kit Requests	2,727	2,630	3.7	14,376	15,844	(9.3)
Online Advertising Budget				\$167,973	\$186,306	(9.8)

E-newsletters

Consumer – More than 37,000 prospective visitors received the e-newsletter in January, the same level of subscriptions 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 January. These subscription levels are also similar to the previous month.

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 grew by more than 50 percent compared to last year at this time. 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

	Jan FY 10	Jan FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Total Print Requests	2,201	2,040	7.9	32,332	20,614	56.8
Consumer Label Requests	1,809	1,938	(6.7)	29,815	19,609	52
Print Advertising Requests	392	102	284.3	2,517	1,005	150.4
Total Print Budget				\$145,897	\$150,163	(2.8)
Broadcast (TV/Radio) Requests	138	232	(40.5)	1,651	1,453	13.6
Broadcast Budget				\$87,628	\$318,091	(72.5)

Welcome Centers

This January, 22,068 travelers visited Maryland Welcome Center locations. The four operating Welcome Centers served 17 percent fewer visitors compared to last January.

Lodging

According to the latest data from Smith Travel Research, Inc., Maryland lodging performance fared worse than the nation, on average. The number of rooms sold in January grew 1.9 percent, compared to a national growth of 2.6 percent across the country – a 1 point disadvantage for Maryland. Revenues were down 14.8 percent in Maryland compared to the national revenue loss of 4.7 percent– a 10 point disadvantage for Maryland. In 2009, Maryland's overall hotel performance was given a boost by the opening of Gaylord International in Prince George's County, as well as the presidential inauguration in January 2009.

Amtrak

In January the Amtrak train system in Maryland recorded 60,600 non-commuter arrivals, 2.4 percent more travelers compared to last January.

Airports

In January BWI served 730,943 domestic passenger arrivals, up 5.8 percent compared to last January. The airport served 22,826 international arrivals, up 1.9 percent from last January. Total arrivals increased by 6 percent compared to last January.

Leisure and Hospitality Employment

January's preliminary employment estimates from the U.S. Bureau of Labor Statistics indicate a net gain of 500 jobs (or less than one percent) in Maryland's leisure and hospitality sector compared to January FY 2009. The number of arts, entertainment, and recreation jobs grew by 1.4 percent; accommodations jobs declined

by 3.7 percent; and the food services sub-sector grew by 0.6 percent. On a national level, the leisure and hospitality industry saw a 1.8 percent loss in net jobs. Arts, entertainment and recreation jobs dropped 3.5 percent; accommodations jobs dropped 4.3 percent; and food services dropped 1 percent.

	Maryland Jobs			U.S. Jobs		
	Jan FY 10	Jan FY 09	% Change	Jan FY 10	Jan FY 09	% Change
Total Leisure and Hospitality	213,800	213,300	0.2	12,378,000	12,607,000	(1.8)
Arts, Entertainment, Recreation	28,600	28,200	1.4	1,673,400	1,734,800	(3.5)
Accommodation	20,800	21,600	(3.7)	1,642,500	1,715,800	(4.3)
Food Services	164,400	163,500	0.6	9,062,100	9,156,400	(1)

Tourism Sales Taxes

Preliminary sales and use tax data is now available for January. 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 2.3 percent decline compared to a 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-Jan FY 2010 Sales Tax Collections (\$)	July-Jan FY 2009 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	21,487,110	21,645,739	(0.7)
901 Hotels, Motels, Apartments, Cottages	45,783,359	49,123,482	(6.8)
108 Restaurants, Lunchrooms, Delis WO/BWL*	161,924,500	163,555,286	(1)
112 Restaurants and Nite Clubs - W/BWL*	112,680,237	112,824,486	(0.1)
306 General Merchandise	81,410,065	74,739,287	8.9
407 Automobile, Bus and Truck Rentals	26,350,424	35,918,370	(26.6)
706 Airlines - Commercial	111,823	157,343	(28.9)
925 Recreation and Amusement Places	3,114,890	5,353,814	(41.8)
Tourism Tax Categories Subtotal	452,862,408	463,317,807	(2.3)
Sales Tax Subtotal - All Categories	2,185,602,145	2,325,593,039	(6)

TOURISM TAX FACTOR

Tax Category	Tax Factor	July-Jan FY 2010 (\$)	July-Jan FY 2009 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	21,487,110	21,645,739	(0.7)
901 Hotels, Motels, Apartments, Cottages	100%	45,783,359	49,123,482	(6.8)
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	53,974,833	54,518,429	(1)
112 Restaurants and Nite Clubs - W/BWL*	33%	37,560,079	37,608,162	(0.1)
306 General Merchandise	5%	4,070,503	3,736,964	8.9
407 Automobile, Bus and Truck Rentals	90%	23,715,382	32,326,533	(26.6)
706 Airlines - Commercial	50%	55,912	78,672	(28.9)
925 Recreation and Amusement Places	50%	1,557,445	2,676,907	(41.8)
Total	-	188,204,623	201,714,888	(6.7)

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