

Maryland Tourism Monitor

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

Web Marketing Results

April's web site visitation was down 24 percent compared to April 2009. Success in previous months still brings the year to date visits to nearly 1.3 million – an increase of 30 percent compared to last year. More than 30,000 of the visits to VisitMaryland.org in April can be attributed to OTD's internet advertising and more than 3,400 requests for travel kits were received via the web site.

	April FY 10	April FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Unique Web Users	132,502	175,084	(24.3)	1,297,936	997,247	30.2
Web Advertising Responses/ Clicks	30,047	46,454	(35.3)	223,700	203,372	10
Web Site Travel Kit Requests	3,409	2,871	18.7	23,827	26,298	(9.4)
Online Advertising Budget				\$244,589	\$231,634	5.6

E-newsletters

Consumer – More than 38,000 prospective visitors received the e-newsletter in April. Subscribers have increased 78 percent compared to April 2009.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 7,900 subscribers in April – 12 percent more than April 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 have garnered 29 percent more responses than last year at this time and broadcast requests have risen 7 percent, with a budget 23 percent lower for print advertising and 67 percent lower for broadcast advertising. 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

	April FY 10	April FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Total Print Requests	6,191	6,905	(10.3)	43,925	34,143	28.7
Consumer Label Requests	5,837	6,198	(5.8)	40,188	31,613	27.1
Print Advertising Requests	354	707	(49.9)	3,737	2,530	47.7
Total Print Budget				\$338,357	\$438,477	(22.8)
Broadcast (TV/Radio) Requests	178	260	(31.5)	2,232	2,085	7.1
Broadcast Budget				\$115,568	\$348,555	(66.8)

Welcome Centers

This April, 40,571 travelers visited Maryland Welcome Center locations. The four operating Welcome Centers served 25 percent fewer visitors compared to last April and 19 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.

Lodging

According to the latest data from Smith Travel Research, Inc., Maryland's lodging industry saw more demand for hotel rooms and revenue growth in April, compared to April 2009. Maryland's increase in these categories compared favorably to the nation. The number of rooms sold in April grew 10.3 percent, compared to a national growth in demand of 7.3 percent – a 3 point advantage for Maryland. For the year to date, room demand grew 8.1 percent in Maryland and 5.7 percent across the country. In April, revenues were up 9.9 percent in Maryland compared to the national revenue growth of 6.1 percent– a 4 point advantage for Maryland. For the year to date, revenues are up 0.6 percent in Maryland, compared to a 2.1 percent growth across the U.S.

Amtrak

In April, the Amtrak train system in Maryland recorded 74,200 non-commuter arrivals, 4.4 percent more travelers compared to last April.

Airports

In April, BWI served 909,369 domestic passenger arrivals, up 4 percent compared to last April. The airport served 24,619 international arrivals, up 31 percent from last April. The number of total arrivals grew by 5 percent compared to last April.

Leisure and Hospitality Employment

April's preliminary employment estimates from the U.S. Bureau of Labor Statistics indicate a net gain of 1,800 jobs in Maryland's leisure and hospitality sector compared to April FY 2009. The number of arts, entertainment, and recreation jobs grew by 5.3 percent; accommodations jobs remained the same; and the food services sub-sector added 3.1

percent more jobs. On a national level, the number of jobs in the leisure and hospitality industry remained the same. Arts, entertainment and recreation jobs dropped 0.4 percent; accommodations jobs dropped 1.3 percent; and food services added 0.4 percent.

	Maryland Jobs			U.S. Jobs		
	April FY 10	April FY 09	% Change	April FY 10	April FY 09	% Change
Total Leisure and Hospitality	234,300	227,200	3.1	12,989,000	12,983,000	0
Arts, Entertainment, Recreation	35,700	33,900	5.3	1,858,500	1,865,400	(0.4)
Accommodation	22,600	22,600	0	1,694,300	1,715,700	(1.3)
Food Services	176,000	170,700	3.1	9,436,200	9,401,900	0.4

Tourism Sales Taxes

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

a 2.6 percent decline compared to a 4.6 percent decline respectively. The SB 458 tourism tax factor lags 7 percent behind last year's collections.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	Jul-Mar FY 2010 Sales Tax Collections (\$)	Jul-Mar FY 2009 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	26,712,679	26,984,157	(1)
901 Hotels, Motels, Apartments, Cottages	56,623,205	61,415,061	(7.8)
108 Restaurants, Lunchrooms, Delis WO/BWL*	206,107,724	210,993,580	(2.3)
112 Restaurants and Nite Clubs - W/BWL*	144,334,232	145,242,541	(0.6)
306 General Merchandise	103,221,610	94,114,673	9.7
407 Automobile, Bus and Truck Rentals	32,948,214	44,362,687	(25.7)
706 Airlines - Commercial	216,322	169,691	27.5
925 Recreation and Amusement Places	3,789,990	6,081,851	(37.7)
Tourism Tax Categories Subtotal	573,953,976	589,364,241	(2.6)
Sales Tax Subtotal - All Categories	2,769,715,983	2,902,807,199	(4.6)

TOURISM TAX FACTOR

Tax Category	Tax Factor	Jul-Mar FY 2010 (\$)	Jul-Mar FY 2009 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	26,712,679	26,984,157	(1)
901 Hotels, Motels, Apartments, Cottages	100%	56,623,205	61,415,061	(7.8)
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	68,702,575	70,331,193	(2.3)
112 Restaurants and Nite Clubs - W/BWL*	33%	48,111,411	48,414,180	(0.6)
306 General Merchandise	5%	5,161,080	4,705,734	9.7
407 Automobile, Bus and Truck Rentals	90%	29,653,393	39,926,418	(25.7)
706 Airlines - Commercial	50%	108,161	84,846	27.5
925 Recreation and Amusement Places	50%	1,894,995	3,040,926	(37.7)
Total	-	236,967,499	254,902,515	(7)

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