

Maryland Tourism Monitor

A monthly report of Maryland travel and tourism trends as monitored by the Office of Tourism Development
Data as of April 30, 2011

Web Marketing Results

March's web site visitation was up 35 percent compared to last March, according to WebTrends analysis. More than 25,000 of the visits to *VisitMaryland.org* in March can be attributed to OTD's internet advertising – a growth of 43 percent – and more than 1,500 requests for travel kits were received via the web site. This year's online advertising budget is 27 percent lower than last year's budget.

	Mar FY 2011	Mar FY 2010	% Change	FY 2011 YTD	FY 2010 YTD	% Change
Unique Web Users	129,767	115,377	34.8	1,054,620	1,165,434	(9.5)
Web Advertising Responses/Clicks	25,409	16,172	42.6	187,319	193,653	(3.3)
Web Site Travel Kit Requests	1,537	3,494	(38.4)	17,597	20,418	(13.8)
Online Advertising Budget to date				\$163,543	\$224,142	(27)

E-newsletters

Consumer – Nearly 43,000 prospective visitors received the e-newsletter in March. The number of subscribers grew 13 percent compared to last March.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,700 subscribers in March – 12 percent more than last March.

Requests for Travel Information

OTD also receives requests for travel kits in response to print, radio, and TV advertising. OTD's advertising expenditures last year reflected more than \$128,000 from the Federal Highway Administration for the cooperative Historic National Road campaign. This year, OTD's print advertising budget is down 75 percent compared to last year – with a corresponding 62 percent fewer requests received. Broadcast requests have declined 9 percent for this year with a budget that is 22 percent higher than last year's for these efforts. OTD continues its annual "Maryland Minute" radio sponsorship in FY 2011, adding the Philadelphia market in September 2010. These spots drive prospective visitors to the *VisitMaryland.org* web site for travel information.

ADVERTISING GENERATED REQUESTS

	Mar FY 2011	Mar FY 2010	% Change	FY 2011 YTD	FY 2010 YTD	% Change
Consumer Label Requests	2,226	2,874	(22.5)	12,080	34,351	(64.8)
Print Advertising Requests	1,014	593	71	2,399	3,383	(29.1)
Total Print	3,240	3,467	(6.5)	14,479	37,734	(61.6)
Total Print Budget				\$56,342	\$223,493	(74.8)
Broadcast (TV/Radio) Requests	390	186	109.7	1,870	2,054	(9)
Broadcast Budget				\$129,028	\$106,175	21.5

Welcome Centers

This March, more than 17,400 travelers visited Maryland Welcome Center locations. Two newly constructed OTD-operated Welcome Centers are open at South Mountain, on either side of I-70, in addition to the two OTD-operated centers located on Interstate 95 south of Baltimore. South Mountain Welcome Centers are now open Friday through Sunday, 8:30 am to 4:30 pm. The I-95 Welcome Centers are open Thursday through Sunday, 8:30 am to 4:30 pm.

Lodging

According to the latest data from Smith Travel Research, Inc., Maryland's lodging industry saw more demand for hotel rooms and revenue growth this March, compared to last March. The number of rooms sold in March grew 2.3 percent, compared to a national growth in demand of 7 percent. In March, revenue from hotel rooms across the state was up 3.6 percent in Maryland compared to a national hotel room revenue growth of 11 percent.

Amtrak

In March, the Amtrak train system in Maryland recorded 74,300 non-commuter arrivals – 1 percent more travelers than last March.

Airports

In March, BWI served 921,922 domestic passenger arrivals – up 5 percent compared to last March, and 23,438 international arrivals – up 3 percent from last March. The number of total arrivals grew by 5 percent compared to last March.

Leisure and Hospitality Employment

Maryland's leisure and hospitality sector employment remained relatively flat from last March, according to preliminary employment estimates from the U.S. Bureau of Labor Statistics. The number of arts, entertainment, and recreation jobs grew by 3 percent, while the number of accommodations and food services jobs declined 1 percent.

On a national level, the number of jobs in the leisure and hospitality sector remained steady. The number of arts, entertainment, and recreation jobs grew by less than 1 percent, and the accommodations sub-sector added 2 percent more jobs, while food services jobs remained flat compared to last March.

	Maryland Jobs			U.S. Jobs		
	Mar FY 2011	Mar FY 2010	% Change	Mar FY 2011	Mar FY 2010	% Change
Total Leisure and Hospitality	214,000	214,800	(0.4)	12,614,900	12,578,200	0.3
Arts, Entertainment, Recreation	31,200	30,300	3	1,747,600	1,740,300	0.4
Accommodations	20,900	21,200	(1.4)	1,719,100	1,678,500	2.4
Food Services	161,900	163,300	(0.9)	9,148,200	9,159,400	(0.1)

Tourism Sales Taxes

Sales and use tax data is now available for March. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed two points better than total sales tax collections for the first three quarters of the fiscal year, posting 6 percent growth compared to 4 percent growth respectively. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller – performed twice as well as overall sales taxes, reflecting 8.5 percent growth.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	Jul - Mar FY 2011 Sales Tax Collections (\$)	Jul - Mar FY 2010 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	29,111,535	26,712,676	9
901 Hotels, Motels, Apartments, Cottages	60,509,907	56,623,208	6.9
108 Restaurants, Lunchrooms, Delis WO/BWL*	214,063,111	206,107,725	3.9
112 Restaurants and Nite Clubs - W/BWL*	152,678,171	144,334,336	5.8
306 General Merchandise	105,732,382	103,221,606	2.4
407 Automobile, Bus and Truck Rentals	42,041,018	32,948,214	27.6
706 Airlines - Commercial	177,601	216,322	(17.9)
925 Recreation and Amusement Places	4,118,554	3,789,991	8.7
Tourism Tax Categories Subtotal	608,432,279	573,954,078	6
Sales Tax Subtotal - All Categories	2,883,073,568	2,769,715,982	4.1

TOURISM TAX FACTOR

Tax Category	Tourism Factor	Jul - Mar FY 2011 (\$)	Jul - Mar FY 2010 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	29,111,535	26,712,676	9
901 Hotels, Motels, Apartments, Cottages	100%	60,509,907	56,623,208	6.9
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	71,354,370	68,702,575	3.9
112 Restaurants and Nite Clubs - W/BWL*	33%	50,892,724	48,111,445	5.8
306 General Merchandise	5%	5,286,619	5,161,080	2.4
407 Automobile, Bus and Truck Rentals	90%	37,836,916	29,653,393	27.6
706 Airlines - Commercial	50%	88,801	108,161	(17.9)
925 Recreation and Amusement Places	50%	2,059,277	1,894,996	8.7
Total	-	257,140,149	236,967,534	8.5

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