

Maryland Tourism Monitor

A monthly report of Maryland travel and tourism trends as monitored by the Office of Tourism Development
Data as of August 31, 2011

Web Marketing Results

July's web site visitation was up 4 percent compared to last July, according to Google Analytics. More than 7,700 of the visits to *VisitMaryland.org* in July can be attributed to OTD's internet advertising and more than 1,100 requests for travel kits were received via the web site. The year's online advertising budget was 63 percent greater than last year's budget.

	July FY 2012	July FY 2011	% Change
Unique Web Users	155,088	149,413	3.8
Web Advertising Responses/Clicks	7,705	24,099	(68)
Web Site Travel Kit Requests	1,139	3,849	(70.4)
Online Advertising Budget to date	\$17,393	\$10,654	63.3

*OTD began to track web stats via Google Analytics in FY 2012.

E-newsletters

Consumer – Nearly 64,000 prospective visitors received the e-newsletter in July. The number of subscribers grew 65.6 percent compared to last July.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 9,000 subscribers in July – 9 percent more than last July.

Requests for Travel Information

OTD also receives requests for travel kits in response to print, radio, and TV advertising. This year, OTD's print advertising budget was up 77 percent compared to the previous year; responses reflected 39 percent more requests. Broadcast requests declined 54 percent for the year with a budget that was 31 percent lower than last year's. OTD continued its annual "Maryland Minute" radio sponsorship in FY 2012. These spots drive prospective visitors to the *VisitMaryland.org* web site for travel information.

ADVERTISING GENERATED REQUESTS

	July FY 2012	July FY 2011	% Change
Consumer Label Requests	3,020	2,084	44.9
Print Advertising Requests	138	186	(25.8)
Total Print	3,158	2,270	39.1
Total Print Budget	\$20,799	\$11,752	77
Broadcast (TV/Radio) Requests	137	297	(53.9)
Broadcast Budget	\$8,649	\$12,597	(31.3)

Welcome Centers

This July, more than 36,000 travelers visited Maryland Welcome Center locations – two OTD-operated Welcome Centers 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 open Thursday through Sunday, 8:30 am to 4:30 pm, through the end of October. The I-95 Welcome Centers are open Wednesday through Sunday, 8:30 am to 4:30 pm, through the end of October.

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 July, compared to last July. The number of rooms sold in July grew 1.3 percent compared to a national growth in demand of 3.6 percent. In July, revenue from hotel rooms across the state was up 2.5 percent in Maryland, compared to a national hotel revenue growth of 7.7 percent.

Amtrak

In July, the Amtrak train system in Maryland recorded 75,900 non-commuter arrivals – 4 percent more travelers than last July.

Airports

In July, BWI recorded the busiest month in the history of the airport. The airport served more than 1,062,989 domestic passenger arrivals – up 1.4 percent compared to last July, and more than 32,000 international arrivals – up 21.4 percent from last July. The number of total arrivals grew by 1.9 percent compared to last July.

Leisure and Hospitality Employment

Maryland's leisure and hospitality sector employment grew overall compared to last July, according to preliminary employment estimates from the U.S. Bureau of Labor Statistics. While the number of arts, entertainment, and recreation jobs grew by 7 percent, the number of accommodations jobs declined by 3 percent and food

services jobs declined by less than 1 percent – for a net gain of 1,000 jobs. On a national level, the number of jobs in the leisure and hospitality sector also grew. The number of arts, entertainment, and recreation sector jobs declined by 1 percent, while accommodations added 3 percent and food services added 2 percent more jobs.

Leisure and hospitality jobs	Maryland Jobs			U.S. Jobs		
	July FY 2012	July FY 2011	% Change	July FY 2012	July FY 2011	% Change
Total Leisure and Hospitality	248,900	247,900	0.4	13,881,000	13,689,000	1.4
Arts, Entertainment, Recreation	46,400	43,400	6.9	2,203,400	2,235,100	(1.4)
Accommodations	25,200	25,900	(2.7)	1,963,100	1,912,800	2.6
Food Services	177,300	178,600	(0.7)	9,714,500	9,540,600	1.8

Tourism Sales Taxes

Preliminary sales and use tax data is now available for July. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed more than five points better than total sales tax collections in the first month of fiscal year 2012, posting more than 8 percent growth compared to nearly 3 percent growth respectively. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller – grew at a rate more than 3 times as much as overall sales taxes, reflecting 8 percent growth.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	FY 2012 Sales Tax Collections (\$)	FY 2011 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	4,628,313	4,223,205	9.9
901 Hotels, Motels, Apartments, Cottages	9,923,979	10,098,231	(1.7)
108 Restaurants, Lunchrooms, Delis WO/BWL*	25,973,368	25,287,291	2.7
112 Restaurants and Nite Clubs - W/BWL*	21,682,767	19,073,550	13.7
306 General Merchandise	10,921,387	9,893,585	10.4
407 Automobile, Bus and Truck Rentals	6,042,942	4,489,030	34.6
706 Airlines - Commercial	16,132	8,831	82.7
925 Recreation and Amusement Places	610,458	589,549	3.6
Tourism Tax Categories Subtotal	79,799,348	73,663,272	8.3
Sales Tax Subtotal - All Categories	331,593,735	323,636,512	2.5

TOURISM TAX FACTOR

Tax Category	Tourism Factor	FY 2012 (\$)	FY 2011 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	4,628,313	4,223,205	9.9
901 Hotels, Motels, Apartments, Cottages	100%	9,923,979	10,098,231	(1.7)
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	8,657,789	8,429,097	2.7
112 Restaurants and Nite Clubs - W/BWL*	33%	7,227,589	6,357,850	13.7
306 General Merchandise	5%	546,069	494,679	10.4
407 Automobile, Bus and Truck Rentals	90%	5,438,648	4,040,127	34.6
706 Airlines - Commercial	50%	8,066	4,416	82.7
925 Recreation and Amusement Places	50%	305,229	294,775	3.6
Total	-	36,735,684	33,942,379	8.2

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