

Maryland Tourism Monitor

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

Web Marketing Results

November's web site visitation is up 23 percent compared to last November, according to Google Analytics. More than 15,000 of the visits to VisitMaryland.org in November can be attributed to OTD's internet advertising and more than 600 requests for travel kits were received via the web site. The year's online advertising budget to date in FY 2012 is 42 percent greater than last year's budget.

	Nov. FY 2012	Nov. FY 2011	% Change	FY 2012 YTD	FY 2011 YTD	% Change
Unique Web Users	77,253	62,806	23	615,865	512,218	20.2
Web Advertising Responses/Clicks	15,272	14,574	4.8	193,250	109,746	76.1
Web Site Travel Kit Requests	651	982	(33.7)	5,347	9,847	(45.7)
Online Advertising Budget to date				\$161,751	\$113,615	42.4

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

E-newsletters

Consumer – More than 67,000 prospective visitors received the e-newsletter in November. The number of subscribers grew 57.6 percent compared to last November.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 9,000 subscribers in November – 7 percent more than last November.

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 116 percent compared to the previous year; responses reflect 57 percent more requests. Broadcast requests were up 153 percent, with a year-to-budget that was 45 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

	Nov. FY 2012	Nov. FY 2011	% Change	FY 2012 YTD	FY 2011 YTD	% Change
Consumer Label Requests	1,105	876	26.1	9,269	6,388	45.1
Print Advertising Requests	296	62	377.4	1,819	656	177.3
Total Print	1,401	938	49.4	11,088	7,044	57.4
Total Print Budget				\$44,124	\$20,382	116.5
Broadcast (TV/Radio) Requests	453	105	331.4	2,617	1,036	152.6
Broadcast Budget				\$38,718	\$69,862	(44.6)

Welcome Centers

This November, 15,002 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. Beginning in November, South Mountain Welcome Centers were open Friday through Sunday, 8:30 am to 4:30 pm and I-95 Welcome Centers were 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 November, compared to last November. The number of rooms sold in November grew 8.1 percent compared to a national growth in demand of 5.3 percent. In November, revenue from hotel rooms across the state was up 9.5 percent in Maryland, compared to a national hotel revenue growth of 9.9 percent.

Amtrak

In November, the Amtrak train system in Maryland recorded 82,500 non-commuter arrivals – 8.1 percent more travelers than last November.

Airports

In November, BWI served 867,180 domestic passenger arrivals and 25,362 international arrivals. Total arrivals were down 7.8 percent compared to last November due to schedule adjustments that reflect higher fuel costs. International arrivals grew 13 percent compared to last November.

Leisure and Hospitality Employment

Maryland's leisure and hospitality sector employment declined slightly compared to last November, according to preliminary employment estimates from the U.S. Bureau of Labor Statistics. The number of arts, entertainment, and recreation jobs declined by less than 1 percent and accommodations jobs declined by 2 percent;

while, food services jobs grew by less than 1 percent – for a net loss of 400 jobs. On a national level, the number of jobs in the leisure and hospitality sector grew by 2 percent. The number of arts, entertainment and recreation sector jobs declined slightly, while the accommodations and food services subsectors both added 2 percent more jobs.

	Maryland Jobs			U.S. Jobs		
	Nov. FY 2012	Nov. FY 2011	% Change	Nov. FY 2012	Nov. FY 2011	% Change
Total Leisure and Hospitality	222,000	222,400	(0.2)	13,065,300	12,810,500	2
Arts, Entertainment, Recreation	32,600	32,800	(0.6)	1,746,400	1,748,500	(0.1)
Accommodations	21,700	22,100	(1.8)	1,748,900	1,709,900	2.3
Food Services	167,700	167,500	0.1	9,570,000	9,352,100	2.3

Tourism Sales Taxes

Preliminary sales and use tax data is now available for November. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed almost four points better than total sales tax collections in the first quarter of fiscal year 2012, posting nearly 8 percent growth compared to more than 4 percent growth respectively. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller – reflected 5.8 percent growth.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	Jul. - Nov. FY 2012 Sales Tax Collections (\$)	Jul. - Nov. FY 2011 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	19,743,144	19,104,682	3.3
901 Hotels, Motels, Apartments, Cottages	40,746,494	39,845,772	2.3
108 Restaurants, Lunchrooms, Delis WO/BWL*	127,005,938	121,337,593	4.7
112 Restaurants and Nite Clubs - W/BWL*	99,898,324	86,116,935	16
306 General Merchandise	60,159,602	54,431,514	10.5
407 Automobile, Bus and Truck Rentals	28,608,557	27,695,839	3.3
706 Airlines - Commercial	142,347	92,758	53.5
925 Recreation and Amusement Places	2,394,131	2,347,881	2
Tourism Tax Categories Subtotal	378,698,537	350,972,974	7.9
All Categories Subtotal	1,665,285,946	1,598,527,763	4.2

TOURISM TAX FACTOR

Tax Category	Tourism Factor	Jul. - Nov. FY 2012 (\$)	Jul. - Nov. FY 2011 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	19,743,144	19,104,682	3.3
901 Hotels, Motels, Apartments, Cottages	100%	40,746,494	39,845,772	2.3
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	42,335,313	40,445,864	4.7
112 Restaurants and Nite Clubs - W/BWL*	33%	33,299,441	28,705,645	16
306 General Merchandise	5%	3,007,980	2,721,576	10.5
407 Automobile, Bus and Truck Rentals	90%	25,747,701	24,926,255	3.3
706 Airlines - Commercial	50%	71,174	46,379	53.5
925 Recreation and Amusement Places	50%	1,197,066	1,173,941	2
Total	-	166,148,312	156,970,114	5.8

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