

Maryland Tourism Monitor

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

Web Marketing Results

May's web site visitation was up 12 percent compared to last May, according to WebTrends analysis. More than 105,000 of the visits to *VisitMaryland.org* in May can be attributed to OTD's internet advertising – a growth of 78 percent – and more than 1,100 requests for travel kits were received via the web site. This year's online advertising budget is 4 percent higher than last year's budget.

	May FY 2011	May FY 2010	% Change	FY 2011 YTD	FY 2010 YTD	% Change
Unique Web Users	207,359	184,771	12.2	1,407,398	1,482,707	(5.1)
Web Advertising Responses/ Clicks	105,471	59,216	78.1	337,269	282,916	19.2
Web Site Travel Kit Requests	1,172	3,753	(68.8)	19,873	27,580	(27.9)
Online Advertising Budget to date				\$316,815	\$303,528	4.4

E-newsletters

Consumer – More than 43,000 prospective visitors received the e-newsletter in May. The number of subscribers grew 13.7 percent compared to last May.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,800 subscribers in May – 10 percent more than last May.

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 47 percent compared to last year – while responses reflect 45 percent fewer requests received. Broadcast requests have increased 9 percent for this year with a budget that is 2 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 FY 11. These spots drive prospective visitors to the *VisitMaryland.org* web site for travel information.

ADVERTISING GENERATED REQUESTS

	May FY 2011	May FY 2010	% Change	FY 2011 YTD	FY 2010 YTD	% Change
Consumer Label Requests	8,069	11,001	(26.7)	26,900	51,189	(47.4)
Print Advertising Requests	481	185	160	3,554	3,922	(9.4)
Total Print	8,550	11,186	(23.6)	30,454	55,111	(44.7)
Total Print Budget				\$202,094	\$379,349	(46.7)
Broadcast (TV/Radio) Requests	429	173	148	2,632	2,406	9.4
Broadcast Budget				\$228,231	\$224,451	1.7

Welcome Centers

This May, more than 29,000 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. All four Welcome Centers are open an additional day from May to October, historically Maryland's busiest travel season. 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 May, compared to last May. The number of rooms sold in May grew 4.2 percent compared to a national growth in demand of 5.4 percent. In May, revenue from hotel rooms across the state was up 5.6 percent in Maryland, compared to a national hotel revenue growth of 9.6 percent.

Amtrak

In May, the Amtrak train system in Maryland recorded 81,200 non-commuter arrivals – 5.6 percent more travelers than last May.

Airports

In May, BWI served 1,014,787 domestic passenger arrivals – up 6.9 percent compared to last May, and 28,138 international arrivals – up 11.5 percent from last May. The number of total arrivals grew by 7 percent compared to last May.

Leisure and Hospitality Employment

Maryland's leisure and hospitality sector employment was relatively flat compared to last May, according to preliminary employment estimates from the U.S. Bureau of Labor Statistics. The number of arts, entertainment and recreation jobs grew by 2 percent, while the number of accommodations jobs declined by 3 percent and food

services jobs declined by 2 percent. On a national level, the number of jobs in the leisure and hospitality sector grew slightly. While the number of arts, entertainment and recreation sector lost 1 percent of jobs, the accommodations and food services sub-sectors each added 2 percent more jobs.

	Maryland Jobs			U.S. Jobs		
	May FY 2011	May FY 2010	% Change	May FY 2011	May FY 2010	% Change
Total Leisure and Hospitality	232,800	236,200	(1.4)	13,416,000	13,228,000	1.4
Arts, Entertainment, Recreation	38,900	38,200	1.8	1,958,700	1,981,100	(1.1)
Accommodations	22,800	23,600	(3.4)	1,785,500	1,753,200	1.8
Food Services	171,100	174,400	(1.9)	9,671,800	9,493,300	1.9

Tourism Sales Taxes

Sales and use tax data is now available for May. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed two points better than total sales tax collections for this fiscal year to date, posting nearly 6 percent growth compared to nearly 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 percent growth.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	Jul - May FY 2011 Sales Tax Collections (\$)	Jul - May FY 2010 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	36,651,576	34,016,679	7.7
901 Hotels, Motels, Apartments, Cottages	74,676,336	70,544,331	5.9
108 Restaurants, Lunchrooms, Delis WO/BWL*	263,292,683	255,348,212	3.1
112 Restaurants and Nite Clubs - W/BWL*	190,839,408	181,613,634	5.1
306 General Merchandise	126,890,898	123,133,855	3.1
407 Automobile, Bus and Truck Rentals	52,223,455	40,299,726	29.6
706 Airlines - Commercial	223,116	271,484	(17.8)
925 Recreation and Amusement Places	5,217,055	4,620,017	12.9
Tourism Tax Categories Subtotal	750,014,528	709,847,937	5.7
Sales Tax Subtotal - All Categories	3,528,907,973	3,402,907,767	3.7

TOURISM TAX FACTOR

Tax Category	Tourism Factor	Jul - May FY 2011 (\$)	Jul - May FY 2010 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	36,651,576	34,016,679	7.7
901 Hotels, Motels, Apartments, Cottages	100%	74,676,336	70,544,331	5.9
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	87,764,228	85,116,071	3.1
112 Restaurants and Nite Clubs - W/BWL*	33%	63,613,136	60,537,878	5.1
306 General Merchandise	5%	6,344,545	6,156,693	3.1
407 Automobile, Bus and Truck Rentals	90%	47,001,109	36,269,753	29.6
706 Airlines - Commercial	50%	111,558	135,742	(17.8)
925 Recreation and Amusement Places	50%	2,608,528	2,310,008	12.9
Total	-	318,771,016	295,087,154	8

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