

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, 2011

Web Marketing Results

April's web site visitation was up 10 percent compared to last April, according to WebTrends analysis. More than 44,000 of the visits to *VisitMaryland.org* in April can be attributed to OTD's internet advertising – a growth of 48 percent – and more than 1,100 requests for travel kits were received via the web site. This year's online advertising budget is 21 percent lower than last year's budget.

	April FY 2011	April FY 2010	% Change	FY 2011 YTD	FY 2010 YTD	% Change
Unique Web Users	145,419	132,502	9.7	1,200,039	1,297,936	(7.5)
Web Advertising Responses/ Clicks	44,479	30,047	48	231,798	223,700	3.6
Web Site Travel Kit Requests	1,104	3,409	(67.6)	18,701	23,827	(21.5)
Online Advertising Budget to date				\$194,058	\$244,589	(20.7)

E-newsletters

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

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,800 subscribers in April – 12 percent more than last April.

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 54 percent compared to last year – while responses reflect 50 percent fewer requests received. Broadcast requests have declined 1 percent for this year with a budget that is 29 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

	April FY 2011	April FY 2010	% Change	FY 2011 YTD	FY 2010 YTD	% Change
Consumer Label Requests	6,679	5,837	14.4	18,759	40,188	(53.3)
Print Advertising Requests	674	354	90.4	3,073	3,737	(17.8)
Total Print	7,353	6,191	18.8	21,832	43,925	(50.3)
Total Print Budget				\$155,599	\$338,357	(54)
Broadcast (TV/Radio) Requests	333	179	86	2,203	2,233	(1.3)
Broadcast Budget				\$148,888	\$115,568	28.8

Welcome Centers

This April, more than 24,500 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 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. All four Welcome Centers will be open an additional day from May through October, historically Maryland's busiest travel season.

Lodging

According to the latest data from Smith Travel Research, Inc., Maryland's lodging industry saw slightly more demand for hotel rooms but lower revenues this April, compared to last April. The number of rooms sold in April grew less than one percent compared to a national growth in demand of 5.8 percent. In April, revenue from hotel rooms across the state was down for the first time in 12 months, declining 1.4 percent in Maryland, compared to a national hotel room revenue growth of 8.8 percent.

Amtrak

In April, the Amtrak train system in Maryland recorded 76,800 non-commuter arrivals – 3.5 percent more travelers than last April.

Airports

In April, BWI served 917,903 domestic passenger arrivals – up 1 percent compared to last April, and 26,381 international arrivals – up 7.2 percent from last April. The number of total arrivals grew by 1 percent compared to last April.

Leisure and Hospitality Employment

Maryland's leisure and hospitality sector employment remained relatively flat from last April, according to preliminary employment estimates from the U.S. Bureau of Labor Statistics. The number of arts, entertainment, and recreation jobs grew by 5 percent, while the number of accommodations jobs declined by 2 percent and food

services jobs declined by 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 and food services sub-sectors each added 2 percent more jobs.

	Maryland Jobs			U.S. Jobs		
	April FY 2011	April FY 2010	% Change	April FY 2011	April FY 2010	% Change
Total Leisure and Hospitality	226,300	226,500	(0.1)	13,133,100	12,906,800	1.8
Arts, Entertainment, Recreation	36,300	34,700	4.6	1,865,100	1,864,100	0.1
Accommodations	21,900	22,400	(2.2)	1,745,900	1,706,100	2.3
Food Services	168,100	169,400	(0.8)	9,522,100	9,336,600	2.0

Tourism Sales Taxes

Sales and use tax data is now available for April. 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 8.1 percent growth.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	Jul - Apr FY 2011 Sales Tax Collections (\$)	Jul - Apr FY 2010 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	32,543,140	30,257,816	7.6
901 Hotels, Motels, Apartments, Cottages	66,976,091	62,953,653	6.4
108 Restaurants, Lunchrooms, Delis WO/BWL*	238,680,967	230,603,337	3.5
112 Restaurants and Nite Clubs - W/BWL*	172,066,358	163,153,530	5.5
306 General Merchandise	116,051,066	113,335,039	2.4
407 Automobile, Bus and Truck Rentals	46,864,193	36,630,773	27.9
706 Airlines - Commercial	202,881	246,592	(17.7)
925 Recreation and Amusement Places	4,783,101	4,165,852	14.8
Tourism Tax Categories Subtotal	678,167,797	641,346,592	5.7
Sales Tax Subtotal - All Categories	3,203,307,843	3,087,676,706	3.7

TOURISM TAX FACTOR

Tax Category	Tourism Factor	Jul - Apr FY 2011 (\$)	Jul - Apr FY 2010 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	32,543,140	30,257,816	7.6
901 Hotels, Motels, Apartments, Cottages	100%	66,976,091	62,953,653	6.4
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	79,560,322	76,867,779	3.5
112 Restaurants and Nite Clubs - W/BWL*	33%	57,355,453	54,384,510	5.5
306 General Merchandise	5%	5,802,553	5,666,752	2.4
407 Automobile, Bus and Truck Rentals	90%	42,177,774	32,967,696	27.9
706 Airlines - Commercial	50%	101,440	123,296	(17.7)
925 Recreation and Amusement Places	50%	2,391,551	2,082,926	14.8
Total	-	286,908,324	265,304,427	8.1

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