

Maryland Tourism Monitor

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

Web Marketing Results

October's web site visitation is up 44 percent compared to last October, according to Google Analytics. More than 82,000 of the visits to *VisitMaryland.org* in October can be attributed to OTD's internet advertising and more than 900 requests for travel kits were received via the web site. The year's online advertising budget to date in FY 2012 was 44.7 percent greater than last year's budget.

	Oct. FY 2012	Oct. FY 2011	% Change	FY 2012 YTD	FY 2011 YTD	% Change
Unique Web Users	139,845	97,178	43.9	538,612	449,412	19.8
Web Advertising Responses/ Clicks	82,066	49,527	65.7	177,978	95,172	87
Web Site Travel Kit Requests	923	1,364	(32.3)	4,696	8,865	(47)
Online Advertising Budget to date				\$151,762	\$104,857	44.7

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

E-newsletters

Consumer – Nearly 68,000 prospective visitors received the e-newsletter in October. The number of subscribers grew 61.1 percent compared to last October.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 9,000 subscribers in October – 7.9 percent more than last October.

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 141 percent compared to the previous year; responses reflect 59 percent more requests. Broadcast requests were up 132 percent, with a year-to-date budget that was 42 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

	Oct. FY 2012	Oct. FY 2011	% Change	FY 2012 YTD	FY 2011 YTD	% Change
Consumer Label Requests	1,096	1,088	0.7	8,164	5,512	48.1
Print Advertising Requests	369	65	467.7	1,523	594	156.4
Total Print	1,465	1,153	27.1	9,687	6,106	58.6
Total Print Budget				\$40,753	\$16,926	140.8
Broadcast (TV/Radio) Requests	626	145	331.7	2,164	931	132.4
Broadcast Budget				\$31,578	\$54,579	(42.1)

Welcome Centers

This October, 24,241 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 were open Thursday through Sunday, 8:30 am to 4:30 pm, through the end of October. The I-95 Welcome Centers were open Wednesday through Sunday, 8:30 am to 4:30 pm, through the end of October. Beginning in November, South Mountain Welcome Centers are open Friday through Sunday, 8:30 am to 4:30 pm and 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 October, compared to last October. The number of rooms sold in October grew 0.8 percent compared to a national growth in demand of 3.6 percent. In October, revenue from hotel rooms across the state was up 0.6 percent in Maryland, compared to a national hotel revenue growth of 7.6 percent.

Amtrak

In October, the Amtrak train system in Maryland recorded 81,600 non-commuter arrivals – 0.4 percent more travelers than last October.

Airports

In October, BWI served 970,072 domestic passenger arrivals and 24,048 international arrivals. Total arrivals were down 2.7 percent compared to last October due to capacity cuts at most major carriers.

Leisure and Hospitality Employment

Maryland's leisure and hospitality sector employment contracted by 1.7 percent compared to last October, according to preliminary employment estimates from the U.S. Bureau of Labor Statistics. The number of arts, entertainment and recreation jobs grew by 1 percent, while accommodations jobs declined by less than one percent

and food services jobs declined by 2 percent – for a net loss of 3,900 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 grew slightly, accommodations jobs grew by 3 percent and food services added 2 percent more jobs.

	Maryland Jobs			U.S. Jobs		
	Oct. FY 2012	Oct. FY 2011	% Change	Oct. FY 2012	Oct. FY 2011	% Change
Total Leisure and Hospitality	224,700	228,600	(1.7)	13,249,400	13,030,800	1.7
Arts, Entertainment, Recreation	35,200	34,800	1.1	1,863,000	1,861,800	0.1
Accommodations	22,700	22,900	(0.9)	1,801,100	1,755,000	2.6
Food Services	166,800	170,900	(2.4)	9,585,300	9,414,000	1.8

Tourism Sales Taxes

Preliminary sales and use tax data is now available for October. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed three points better than total sales tax collections in the first quarter of fiscal year 2012, posting more than 7 percent growth compared to nearly 4 percent growth respectively. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller – reflected 5 percent growth.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	Jul. - Oct. FY 2012 Sales Tax Collections (\$)	Jul. - Oct. FY 2011 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	16,586,045	15,849,019	4.7
901 Hotels, Motels, Apartments, Cottages	35,382,252	34,564,795	2.4
108 Restaurants, Lunchrooms, Delis WO/BWL*	103,403,025	100,171,683	3.2
112 Restaurants and Nite Clubs - W/BWL*	82,523,835	71,640,846	15.2
306 General Merchandise	46,778,101	42,674,904	9.6
407 Automobile, Bus and Truck Rentals	23,389,850	18,336,450	2.8
706 Airlines - Commercial	123,511	71,004	73.9
925 Recreation and Amusement Places	2,152,668	2,056,345	4.7
Tourism Tax Categories Subtotal	310,339,287	289,780,815	7.1
All Categories Subtotal	1,337,472,112	1,287,443,691	3.9

TOURISM TAX FACTOR

Tax Category	Tourism Factor	Jul. - Oct. FY 2012 (\$)	Jul. - Oct. FY 2011 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	16,586,045	15,849,019	4.7
901 Hotels, Motels, Apartments, Cottages	100%	35,382,252	34,564,795	2.4
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	34,467,675	33,390,561	3.2
112 Restaurants and Nite Clubs - W/BWL*	33%	27,507,945	23,880,282	15.2
306 General Merchandise	5%	2,338,905	2,133,745	9.6
407 Automobile, Bus and Truck Rentals	90%	21,050,865	20,476,997	2.8
706 Airlines - Commercial	50%	61,756	35,502	73.9
925 Recreation and Amusement Places	50%	1,076,334	1,028,173	4.7
Total	-	138,471,777	131,359,073	5.4

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