

Maryland Tourism Monitor

A monthly report of travel, trade and tourism trends in Maryland as monitored by the Office of Tourism Development

Data as of April 30, 2009

Web Marketing Results

In March, OTD surpassed last year's unique web users for the year to date, even though OTD's online advertising spending is down 28 percent year to date. March's internet visitation grew 37 percent over last March 2008. We expect a continued uptick in visitors over the next few months as OTD purchases more web advertising during the prime travel planning period. More than 18,000 visits to VisitMaryland.org were driven to the site by internet advertising. The number of web site travel kit sign ups dropped slightly from last year, but still remain the top source for requests for information from consumers.

	March FY 09	March FY 08	% Change	FY 09 to date	FY 08 to date	% Change
Unique Web Users	117,717	85,249	37	822,163	814,470	1
Web Advertising Responses/ Clicks	18,675	NA	NA	156,918	139,483	13
Web Site Requests for Information	4,569	4,917	(7)	23,427	26,537	(12)

E-newsletters

Consumer - The number of consumers receiving the e-newsletter in March was 20,202, a 17 percent growth over the previous month as OTD staff members focus efforts on increasing this number.

Industry - The Division of Tourism, Film and the Arts increased the number of people receiving our industry newsletter, reaching 6,169 subscribers in March - more than three times the number of subscribers last year at this time.

Requests for Travel Information

OTD receives requests in response to print, radio and TV advertising. This year-to date, responses to print advertising are down 20 percent; comparably, the advertising placement budget has been reduced by 23 percent. The broadcast advertising budget has increased this year to date by 17 percent in order to maintain a year-round presence on Baltimore and Washington, D.C. radio stations. While we are seeing a decline in the number of responses we receive directly from this medium, OTD representatives heavily market the web site during radio spots. We are experiencing higher web visitation than last year.

	March FY 09	March FY 08	% Change	FY 09 to date	FY 08 to date	% Change
Total Print	4,613	6,148	(25)	27,236	33,865	(20)
Consumer Label Requests	3,931	5,557	(29)	25,414	29,812	(15)
Print Advertising Requests	682	591	15	1,822	4,053	(55)
Total Print Budget	-	-	-	\$281,891	\$364,584	(23)
Broadcast (TV/Radio) Requests	228	340	(33)	1825	3183	(43)
Broadcast Budget	-	-	-	\$338,555	\$290,547	17

Welcome Centers

Excluding the State House Welcome Center, which is now managed by Maryland Archives and the I-70 locations that are temporarily closed for renovations, the Welcome Centers are operating at the same capacity as last year have seen a 2 percent growth in visitation for the year to date, with a 13 percent decline from last March 2008. Youghiogheny (up 18 percent), U.S. 15 (up 11 percent) and Bay Country (up 11 percent) have seen the highest increases in visitor use this year.

Lodging

According to the latest data from Smith Travel Research, Inc., room demand in Maryland grew 2 percent in March compared to the U.S. decline of 9 percent from March 2008 - an 11 point advantage for Maryland. Maryland's total lodging revenue grew 3 percent, compared to an 18 percent loss across the U.S. from last March - a 21 point advantage for Maryland. Highlights are in the Maryland South & East region with total revenue up 73 points for March with 30 percent more rooms sold. Demand in Baltimore City was also up 8 points, with a 5 percent growth in total revenue.

Amtrak

In March, the Amtrak train system in Maryland recorded 67,600 non-commuter arrivals, a decline of 11 percent from the same month last year.

Airports

In March, BWI served 884,775 domestic passenger arrivals, down 7 percent from last March and 18,058 international arrivals, down 24 percent from last March.

Leisure and Hospitality Employment

First quarter employment estimates from the U.S. Bureau of Labor Statistics indicate that job loss in the leisure and hospitality sector is down 5,500 in Maryland, with a loss of 2.5 percent over the first three months of 2009 compared to the same period the previous year.

	1st Quarter 2008 (average jobs)	1st Quarter 2009 (average jobs)	% Change
Arts, Entertainment, and Recreation	30,700	29,500	(3.9)
Accommodation	21,800	22,000	1.0
Food Services/ Drinking Places	167,800	163,300	(2.7)
Total Leisure & Hospitality Sector	220,300	214,800	(2.5)

Tourism Sales Taxes

March sales and use tax data is available. Tourism-related codes are experiencing a 67 percent higher growth rate than overall sales tax collections for this year to date, with a 12.2 percent growth compared to a 7.3 percent growth respectively. Using the Comptroller's assumption that spending pattern slightly decreased with the sales tax increase, OTD estimates that equivalent sales in all tourism-related categories has dropped 1.6 percent and the SB 458 composite of the tourism tax factor still lags 2.6% behind last year's collections.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES						
Tax Code	July - March FY 2009		July - March FY 2008		Actual Tax Revenue Change	Est. Total Sales Change
	Total Receipts	5% Equivalent*	Total Receipts	5% Equivalent*		
111 Hotels, Motels Selling Food W/ BWL**	26,984,157	22,276,641	22,870,166	21,715,498	18.0%	2.6%
901 Hotels, Motels, Apartments, Cottages	61,415,061	50,700,907	51,354,783	48,849,436	19.6%	3.8%
108 Restaurants, Lunchrooms, Delis WO/BWL**	210,993,580	174,184,731	186,758,905	175,108,490	13.0%	-0.5%
112 Restaurants and Nite Clubs - W/BWL**	145,242,541	119,904,279	131,610,268	123,640,109	10.4%	-3.0%
306 General Merchandise	94,114,673	77,695,914	81,222,132	76,488,886	15.9%	1.6%
407 Automobile, Bus and Truck Rentals	44,362,685	36,623,400	46,920,940	44,427,407	-5.5%	-17.6%
706 Airlines - Commercial	169,691	140,088	160,716	145,177	5.6%	-3.5%
925 Recreation and Amusement Places	6,081,851	5,020,843	4,454,854	4,228,851	36.5%	18.7%
Total Tourism Tax Categories Subtotal*	589,364,239	486,546,802	525,352,763	494,603,853	12.2%	-1.6%
Total Sales Taxes Subtotal - All Categories	2,902,807,200	2,396,398,467	2,705,207,383	2,546,119,543	7.3%	-5.9%

* To find 5% equivalent in months when sales tax is 6%, OTD divided tax revenues by 6%, multiplied by .99% then multiplied by 5%.

TOURISM TAX FACTORS AND CATEGORY GROWTH BASED ON 5% ADJUSTMENTS				
Tax Code	Tax Factor	July - March FY 2009	July - March FY 2008	% Change
111 Hotels, Motels Selling Food - W/BWL**	100%	22,276,641	21,715,498	2.6%
901 Hotels, Motels, Apartments, Cottages	100%	50,700,907	48,849,436	3.8%
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL**	33%	57,480,961	57,785,802	-0.5%
112 Restaurants and Nite Clubs - W/BWL**	33%	39,568,412	40,801,236	-3.0%
306 General Merchandise	5%	3,884,796	3,824,444	1.6%
407 Automobile, Bus and Truck Rentals	90%	32,961,060	39,984,667	-17.6%
706 Airlines - Commercial	50%	70,044	72,588	-3.5%
925 Recreation and Amusement Places	50%	2,510,421	2,114,425	18.7%
Total		209,453,242	215,148,096	-2.6%

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