

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, 2010

Web Marketing Results

May's web site visitation was down 25 percent compared to May 2009. Success in previous months still brings the year to date visits to nearly 1.5 million – an increase of 19 percent while the online advertising budget is 12 percent less than last year's. More than 59,000 of the visits to *VisitMaryland.org* in May can be attributed to OTD's internet advertising and more than 3,700 requests for travel kits were received via the web site.

	May FY 10	May FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Unique Web Users	184,771	245,996	(24.9)	1,482,707	1,243,243	19.3
Web Advertising Responses/ Clicks	59,216	87,629	(32.4)	282,916	291,001	(2.8)
Web Site Travel Kit Requests	3,753	4,903	(29.6)	27,580	31,201	(11.6)
Online Advertising Budget to date				\$303,528	\$343,137	(11.5)

E-newsletters

Consumer – Nearly 38,000 prospective visitors received the e-newsletter in May. Subscribers have increased 49.3 percent compared to May 2009.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,000 subscribers in May – 8.8 percent fewer than May 2009.

Requests for Travel Information

OTD also receives requests for travel kits in response to print, radio, and TV advertising. This year responses to print advertising have garnered 20 percent more responses than last year at this time and broadcast requests have increased 8 percent, with a budget 29 percent lower for print advertising and 51 percent lower for broadcast advertising. OTD's advertising expenditures this year reflect more than \$128,000 from the Federal Highway Administration for the cooperative Historic National Road campaign. OTD also continued its annual "Maryland Minute" radio sponsorship in FY10, which drives prospective visitors to the VisitMaryland.org web site for more information.

ADVERTISING GENERATED REQUESTS

	May FY 10	May FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Total Print Requests	11,186	11,914	(6.1)	55,111	46,057	19.7
Consumer Label Requests	11,001	11,256	(2.3)	51,189	42,869	19.4
Print Advertising Requests	185	658	(71.9)	3,922	3,188	23
Total Print Budget				\$379,349	\$536,290	(29.3)
Broadcast (TV/Radio) Requests	173	246	(29.7)	2,405	2,331	3.2
Broadcast Budget				\$224,451	\$457,202	(50.9)

Welcome Centers

This May, more than 40,000 travelers visited Maryland Welcome Center locations. The four operating Welcome Centers served 34 percent fewer visitors compared to last May and 23 percent fewer visitors for the fiscal year to date. Due to budget constraints, Welcome Center hours and days of operation were cut back in December 2009 to 8:30 am to 4:30 pm, Thursday through Sunday.

Lodging

According to the latest data from Smith Travel Research, Inc., Maryland's lodging industry saw more demand for hotel rooms and revenue growth in May, compared to May 2009. Maryland's increase in these categories was consistent with national trends. The number of rooms sold in May grew 8.7 percent, compared to a national growth in demand of 9.6 percent. For the year to date, room demand grew 8.2 percent in Maryland and 6.5 percent across the country – a 2 point advantage for Maryland. In May, revenues were up 8.5 percent in Maryland compared to the national revenue growth of 9.6 percent. For the year to date, revenues are up 2.6 percent in Maryland, compared to a 3.7 percent growth across the U.S.

Amtrak

In May, the Amtrak train system in Maryland recorded 76,900 non-commuter arrivals, 4.3 percent more travelers compared to last May.

Airports

In May, BWI served 949,310 domestic passenger arrivals, up 5 percent compared to last May. The airport served 25,227 international arrivals, up 15.9 percent from last May. The number of total arrivals grew by 5.2 percent compared to last May.

Leisure and Hospitality Employment

In May, Maryland's rate of job growth in the leisure and hospitality sector was among the best in the nation (only Connecticut had a higher rate) with preliminary estimates from the BLS for May indicating a net gain of 6,900 jobs in

Maryland's leisure and hospitality sector over last year. The food services sub-sector accounted for 6,700 new jobs. Leisure and hospitality employment at the national level was down slightly with the loss of 23,000 net jobs.

	Maryland Jobs			U.S. Jobs		
	May FY 10	May FY 09	% Change	May FY 10	May FY 09	% Change
Total Leisure and Hospitality	246,800	239,900	2.9	13,306,800	13,349,600	(0.3)
Arts, Entertainment, Recreation	38,600	38,700	(0.3)	1,972,400	1,992,500	(1)
Accommodation	24,100	23,800	1.3	1,741,600	1,757,600	(0.9)
Food Services	184,100	177,400	3.8	9,592,800	9,599,500	(0.1)

Tourism Sales Taxes

Preliminary sales and use tax data is now available for May. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes continue to outperform total sales taxes this year, with a 1.5 percent

decline compared to a 3.1 percent decline respectively. The SB 458 tourism tax factor lags 5.7 percent behind last year's collections.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES			
Tax Category	Jul-May FY 2010 Sales Tax Collections (\$)	Jul-May FY 2009 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	34,016,676	33,715,436	0.9
901 Hotels, Motels, Apartments, Cottages	70,544,333	75,034,321	(6.0)
108 Restaurants, Lunchrooms, Delis WO/BWL*	255,348,214	258,883,685	(1.4)
112 Restaurants and Nite Clubs - W/BWL*	181,613,737	179,989,051	0.9
306 General Merchandise	123,133,852	112,156,507	9.8
407 Automobile, Bus and Truck Rentals	40,299,726	53,930,770	(25.3)
706 Airlines - Commercial	271,483	199,620	36
925 Recreation and Amusement Places	4,620,018	6,953,208	(33.6)
Tourism Tax Categories Subtotal	709,848,039	720,862,598	(1.5)
Sales Tax Subtotal - All Categories	3,402,907,767	3,513,122,497	(3.1)

TOURISM TAX FACTOR				
Tax Category	Tax Factor	Jul-May FY 2010 (\$)	Jul-May FY 2009 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	34,016,676	33,715,436	0.9
901 Hotels, Motels, Apartments, Cottages	100%	70,544,333	75,034,321	(6.0)
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	85,116,071	86,294,562	(1.4)
112 Restaurants and Nite Clubs - W/BWL*	33%	60,537,912	59,996,350	0.9
306 General Merchandise	5%	6,156,693	5,607,825	9.8
407 Automobile, Bus and Truck Rentals	90%	36,269,753	48,537,693	(25.3)
706 Airlines - Commercial	50%	135,742	99,810	36
925 Recreation and Amusement Places	50%	2,310,009	3,476,604	(33.6)
Total	-	295,087,189	312,762,601	(5.7)

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