

Maryland Tourism Monitor

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

Data as of September 30, 2009

Web Marketing Results

August's web site visitation was up 103 percent compared to last August. More than 20,000 visits to *VisitMaryland.org* in August can be attributed to OTD's internet advertising and more than 2,000 requests for travel kits were received via the web site.

	August FY 10	August FY 09	% Change	FY 10 YTD	FY 09 YTD	% Change
Unique Web Users	152,781	75,271	103	338,137	164,977	105
Web Advertising Responses/ Clicks	20,370	0	-	42,980	-	-
Web Site Requests for Information	2,404	2,351	2.3	5,538	5,402	3.4
Online Advertising Budget	-	-	-	\$19,770	-	-

E-newsletters

Consumer - Nearly 40,000 prospective visitors received the e-newsletter in August, a 10 percent growth over the previous month as OTD staff members continue efforts to increase the number of subscribers.

Industry - - The Division of Tourism, Film, and the Arts sent the industry newsletter to more than 8,400 subscribers in August - nearly four times the number of subscribers last August.

Requests for Travel Information

OTD also receives requests for travel kits in response to print, radio, and TV advertising. This August, responses to print advertising, such as the cooperative Historic National Road campaign, rose 30 percent. 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

	August FY 10	August FY 09	%	FY 10 YTD	FY 09 YTD	% Change
Total Print	3,545	2,734	29.7	9,415	6,836	37.7
Consumer Label Requests	3,082	2,479	24.3	8,464	6,343	33.4
Print Advertising Requests	463	255	81.6	951	493	92.9
Total Print Budget	-	-	-	\$103,161	\$46,518	121.8
Broadcast (TV/Radio) Requests	293	299	(2)	626	638	(1.9)
Broadcast Budget	-	-	-	\$31,067	-	-

Welcome Centers

This August, 134,696 travelers visited Maryland Welcome Center locations. Welcome Centers that are operating on the same capacity as last year experienced a 9 percent decline in visitation.

Lodging

According to the latest data from Smith Travel Research, Inc., Maryland lodging continues to outperform the country. The number of rooms sold through August has grown 0.3 percent this year, compared to a 7.4 percent loss of demand across the country - an 8 point advantage for Maryland. Revenues are down 4 percent for the year to date in Maryland compared to the national revenue loss of 15.7 percent - a 12 point advantage for Maryland. In August, demand declined 2 percent in Maryland compared to last August (outperforming the nation's 6.9 percent decline), while revenue was down 9.3 percent (compared to the 16.3 percent decline across the U.S.).

Amtrak

In August the Amtrak train system in Maryland recorded 69,900 non-commuter arrivals, a decline of 7.6 percent from last August.

Airports

In August BWI served 986,718 domestic passenger arrivals, up 6.5 percent compared to last August. The airport served 23,418 international arrivals, down 1.9 percent from last August. Total arrivals increased by 6.3 percent compared to last August.

Leisure and Hospitality Employment

August's preliminary employment estimates from the U.S. Bureau of Labor Statistics indicate a net decline of 100 jobs in Maryland's leisure and hospitality sector compared to August FY 2009. The food services sub-sector grew while arts, entertainment, and recreation jobs saw a 6.2 percent decline and accommodations jobs saw less than a one percent decline. On a national level, the leisure and hospitality industry saw a 2.1 percent loss in net jobs. Arts, entertainment and recreation jobs dropped 3.6 percent; accommodations jobs dropped 7.1 percent; and food services dropped 0.8 percent.

	Maryland Jobs (thousands)			U.S. Jobs (thousands)		
	Aug FY 10	Aug FY 09	% Change	Aug FY 10	Aug FY 09	% Change
Total Leisure and Hospitality	252.5	252.6	0	13,785.1	14,085.4	(2.1)
Arts, Entertainment, Recreation	41.2	43.9	(6.2)	2,145.7	2,226.4	(3.6)
Accommodation	27.1	27.2	(0.4)	1,839.9	1,980.3	(7.1)
Food Services	184.2	181.5	1.5	9,799.5	9,878.7	(0.8)

Tourism Sales Taxes

Preliminary sales and use tax data is now available for August. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed

twice as well as total sales tax collections this fiscal year through August, with a 3.6 percent decline compared to a 7.8 percent decline respectively. The SB 458 tourism tax factor lags 6 percent behind last year's collections.

TOTAL SALES TAX REVENUES IN TOURISM-RELATED CATEGORIES

Tax Category	July-Aug FY 10 Sales Tax Collections (\$)	July-Aug FY 09 Sales Tax Collections (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	7,627,060	7,774,116	(1.9)
901 Hotels, Motels, Apartments, Cottages	17,886,572	18,941,029	(5.6)
108 Restaurants, Lunchrooms, Delis WO/BWL*	49,227,457	49,771,868	(1.1)
112 Restaurants and Nite Clubs - W/BWL*	35,357,135	36,361,835	(2.8)
306 General Merchandise	19,172,620	19,002,032	0.9
407 Automobile, Bus and Truck Rentals	9,497,636	11,959,197	(20.6)
706 Airlines - Commercial	37,615	53,273	(29.4)
925 Recreation and Amusement Places	1,259,531	1,490,249	(15.5)
Total – Tourism Tax Categories Subtotal	140,065,626	145,353,599	(3.6)
Total Sales Tax - All Categories	626,679,036	679,487,243	(7.8)

TOURISM TAX FACTOR

Tax Category	Tax Factor	July-Aug FY 10 (\$)	July-Aug FY 09 (\$)	% Change
111 Hotels, Motels Selling Food - W/BWL*	100%	7,627,060	7,774,116	(1.9)
901 Hotels, Motels, Apartments, Cottages	100%	17,886,572	18,941,029	(5.6)
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	33%	16,409,152	16,590,623	(1.1)
112 Restaurants and Nite Clubs - W/BWL*	33%	11,785,712	12,120,612	(2.8)
306 General Merchandise	5%	958,631	950,102	0.9
407 Automobile, Bus and Truck Rentals	90%	8,547,872	10,763,277	(20.6)
706 Airlines - Commercial	50%	18,808	26,637	(29.4)
925 Recreation and Amusement Places	50%	629,766	745,125	(15.5)
Total	-	63,863,572	67,911,519	(6.0)

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