

Maryland Tourism Monitor

Monthly recap of Maryland's travel and tourism trends, monitored by the Office of Tourism Development (Data through March 2013)

Web Marketing Results

This year's web site visitation through March is up 25 percent compared to last fiscal year, according to Google Analytics. More than 330,000 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and almost 17,000 requests for travel kits were received via the web site. The year's online advertising budget to date in FY 2013 is 5 percent higher than last year's budget.

| <u>Request Type</u> | <u>FY 2013</u> <u>YTD</u> | <u>FY 2012</u> <u>YTD</u> | <u>Change</u> |
|-----------------------------------|------------------------------|------------------------------|---------------|
| VisitMaryland.org unique visitors | 1,201,037 | 962,439 | 25% |
| Mobile site users | 32,086 | 14,634 | 119% |
| SS200.org | 22,742 | 27,201 | -16% |
| SS200.com | 22,613 | 13,305 | 70% |
| Web advertising clicks | 330,144 | 257,539 | 28% |
| Web travel kit requests | 16,780 | 12,281 | 37% |
| Online advertising budget to date | \$212,750 | \$202,244 | 5% |

E-newsletters

Consumer – Close to 88,500 prospective visitors received the e-newsletter in March. The number of subscribers grew 39 percent compared to last March. Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to over 9,000 subscribers in March.

Social Media Dashboard

The number of *TravelMD* Facebook fans has grown 160 percent this year compared to last March. OTD Twitter followers have grown 108 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 313 customers to click to *VisitMaryland.org* and 247 Twitter followers were driven to the site in March. Facebook sent an additional 179 clicks to the online calendar; Twitter sent 154 users to this address. Photos historically generate the most engagement.

| | <u>March</u> <u>FY 2013</u> | <u>March</u> <u>FY 2012</u> | <u>Change</u> |
|-------------------|--------------------------------|--------------------------------|---------------|
| Facebook Fans | 15,081 | 5,799 | 160% |
| Twitter followers | 14,432 | 6,936 | 108% |

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio, and TV advertising. OTD is continuing the annual "Maryland Minute" radio sponsorships throughout FY2013 and also advertised on television late summer 2012– driving prospective visitors to the *VisitMaryland.org* web site for travel information. This year through March, OTD's print advertising budget was 67 percent greater than the previous year; responses reflected 38 percent more requests. Broadcast requests were 7 percent higher; with a year-to-date budget that was 481 percent larger. The top five lead-generating publications were *Better Homes & Gardens*, *AAA Magazines*, *Civil War Traveler*, *Maryland Life and Gourmet*.

| <u>Request Type</u> | <u>FY13 YTD</u> | <u>FY12 YTD</u> | <u>Change</u> |
|------------------------------|-----------------|-----------------|---------------|
| Print advertising requests | 25,686 | 18,566 | 38% |
| Print advertising budget | \$197,097 | \$118,001 | 67% |
| Broadcast leads | 4,434 | 4,148 | 7% |
| Broadcast advertising budget | \$398,412 | \$68,621 | 481% |

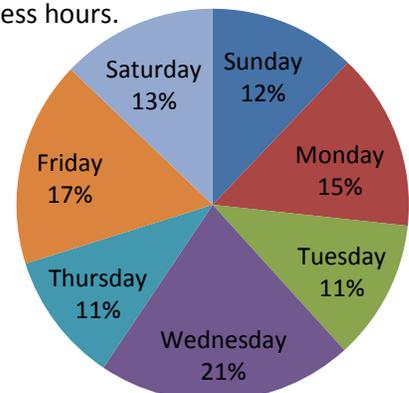
Welcome Centers

Close to 231,000 travelers visited OTD-operated Maryland Welcome Centers this fiscal year through March. These include two Welcome Centers at South Mountain, on either side of I-70, two on I-95 south of Baltimore and the Mason Dixon Center in Emmitsburg. South Mountain Centers were open Friday through Sunday, 8:30 am to 4:30 pm. The I-95 Centers were open Thursday through Sunday, 8:30 am to 4:30 pm and the Mason Dixon Center was open Thursday through Sunday from 9:00 am to 5:00 pm. All five Welcome Centers are open an additional day from May through October.

Kiosk Use

Kiosks at the I-70 Welcome Centers have recorded over 2,000 sessions this year through March. Usage was recorded after business hours 49 percent of the time, while 51 percent was recorded during business hours.

I-70 Kiosks Usage by Day of the Week



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Lodging

According to the latest data from Smith Travel Research, Inc., Maryland's lodging industry has seen growth in room revenue this calendar year to date. The number of rooms sold this year through March 2013 remained unchanged, while the national demand increased by 2.6 percent. Revenue from hotel rooms across the state was up 3 percent, compared to a national revenue growth of 7.2 percent.

Airports

BWI served nearly 8 million domestic passenger arrivals and nearly 280,000 international arrivals this fiscal year through March. Total arrivals increased slightly to 8,214,615 compared to 8,173,758 last year. International arrivals have grown 19 percent this year.

Amtrak

The Amtrak train system in Maryland recorded more than 667,000 non-commuter arrivals this fiscal year through March. This is a slight increase from last year's fiscal year to date number of 662,900.

Leisure and Hospitality Employment

Maryland's leisure and hospitality sector employment grew by 4 percent compared to last March, according to preliminary employment estimates from the U.S. Bureau of Labor Statistics. The sector saw the greatest gains in growth from the arts, entertainment and recreation sector which grew 12 percent; accommodations jobs remained mostly unchanged and food services jobs increased 3 percent. At the national level, the number of arts, entertainment and recreation jobs grew by 3 percent; accommodations jobs grew by 1 percent and food services saw a 4 percent increase.

| | MD Jobs (thousands) | | | U.S. Jobs (thousands) | | |
|---------------------------------|---------------------|---------------|-----------|-----------------------|-----------------|-----------|
| | March FY 2013 | March FY 2012 | Change | March FY 2013 | March FY 2012 | Change |
| Arts, Entertainment, Recreation | 33.9 | 30.3 | 12% | 1,855.1 | 1,797.9 | 3% |
| Accommodations | 21.6 | 21.7 | 0% | 1,758.7 | 1,740.7 | 1% |
| Food Services | 179.2 | 173.7 | 3% | 10,030.8 | 9,690.9 | 4% |
| Total | 234.7 | 225.7 | 4% | 13,644.6 | 13,229.5 | 3% |

Tourism Taxes

Preliminary sales and use tax data is now available for the first eight months of Fiscal Year 2013. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes performed at twice the pace as total sales tax collections for the fiscal year to date. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller – reflected a 1.5 percent growth, also outperforming overall collections.

| Sales Tax Category | TOTAL SALES TAX REVENUES (\$) | | | Tax Factor | TOURISM TAX REVENUES (\$) | | |
|--|-------------------------------|--------------------|-------------|------------|---------------------------|--------------------|-------------|
| | FY 2013 | FY 2012 | % Change | | FY 2013 | FY 2012 | % Change |
| 108 Restaurants, Lunchrooms, Delicatessens - WO/BWL* | 209,034,714 | 202,121,164 | 3.4% | 33% | 69,678,238 | 67,373,721 | 3.4% |
| 111 Hotels, Motels Selling Food - W/BWL* | 27,565,715 | 27,079,005 | 1.8% | 100% | 27,565,715 | 27,079,005 | 1.8% |
| 112 Restaurants and Night Clubs - W/BWL* | 157,647,178 | 157,177,764 | 0.3% | 33% | 52,549,059 | 52,392,588 | 0.3% |
| 306 General Merchandise | 103,450,626 | 102,226,496 | 1.2% | 5% | 5,172,531 | 5,111,325 | 1.2% |
| 407 Automobile, Bus and Truck Rentals** | 41,652,163 | 42,908,947 | -2.9% | 90% | 37,486,947 | 38,618,052 | -2.9% |
| 706 Airlines - Commercial | 173,181 | 223,456 | -22.5% | 50% | 86,591 | 111,728 | -22.5% |
| 901 Hotels, Motels, Apartments, Cottages | 58,468,567 | 56,505,121 | 3.5% | 100% | 58,468,567 | 56,505,121 | 3.5% |
| 925 Recreation and Amusement Places | 3,818,813 | 3,908,931 | -2.3% | 50% | 1,909,407 | 1,954,465 | -2.3% |
| Tourism Tax Categories Subtotal | 601,810,957 | 592,150,885 | 1.6% | - | 252,917,055 | 249,146,007 | 1.5% |
| All Sales Tax Categories Subtotal | 2,709,798,246 | 2,686,719,370 | 0.86% | | | | |