

Maryland Tourism Monitor

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

Web Marketing Results

This year's web site visitation through April is up 19 percent compared to last fiscal year, according to Google Analytics. More than 366,600 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and over 19,000 requests for travel kits were received via the web site. The year's online advertising budget to date in FY2013 is 5 percent larger than last year's budget.

<u>Request Type</u>	<u>FY 2013 YTD</u>	<u>FY 2012 YTD</u>	<u>Change</u>
VisitMaryland.org unique visitors	1,313,953	1,103,849	19%
Mobile site users	35,147	19,591	79%
SS200.org	25,526	32,272	-32%
SS200.com	25,421	37,272	-21%
Web advertising clicks	366,618	304,997	20%
Web travel kit requests	19,076	14,535	31%
Online advertising budget to date	\$239,088	\$226,729	5%

E-newsletters

Consumer – Nearly 88,400 prospective visitors received the e-newsletter in April. The number of subscribers grew 39 percent compared to last April.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to over 9,100 subscribers in April – 1.0% percent less than last year.

Social Media Dashboard

The number of *TravelMD* Facebook fans has grown 140 percent this year compared to last April. OTD Twitter followers have grown 98 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 214 visitors to click to *VisitMaryland.org* and 293 Twitter followers were driven to the site in April. Facebook sent an additional 117 clicks to the online calendar and Twitter sent 214 users to this page.

	<u>April FY 2013</u>	<u>April FY 2012</u>	<u>Change</u>
Facebook Fans	15,535	6,465	140%
Twitter followers	14,947	7,563	98%

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio, and TV advertising. Throughout FY2013, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and in late summer 2012 television advertisements were launched. This year through April, OTD's print advertising budget was 4 percent greater than the previous year; there was a corresponding 31 percent increase in advertising requests. Broadcast requests were 5 percent higher; with a year-to-date budget that was 423 percent larger. The top five lead-generating publications were *Better Homes & Gardens*, *AAA Magazines*, *Maryland Life*, *Civil War Traveler*, and *The Washington Post*.

<u>Request Type</u>	<u>FY13 YTD</u>	<u>FY12 YTD</u>	<u>Change</u>
Print advertising requests	30,024	22,973	31%
Print advertising budget	\$263,572	\$254,133	4%
Broadcast leads	4,937	4,724	5%
Broadcast advertising budget	\$405,545	\$77,546	423%

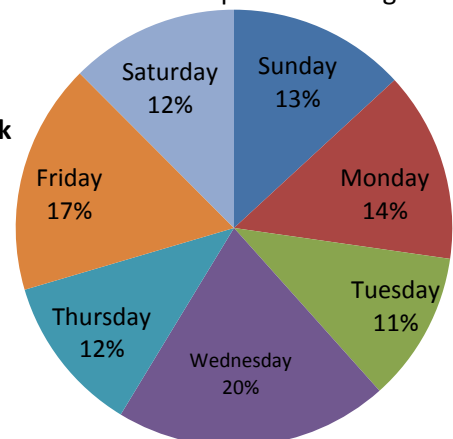
Welcome Centers

Nearly 260,200 travelers visited OTD-operated Maryland Welcome Centers this fiscal year through April. 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 2,200 sessions this year through April. Usage occurred 50 percent of the time during business hours and 50 percent during non-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., the number of rooms sold in Maryland remained relatively flat compared to a 3 percent increase across the US for the same time period. Maryland's lodging industry saw an increase in room revenue of 2.3 percent this calendar year to date compared to last year. Revenue from hotel rooms across the US increased by 7.5 percent.

Airports

BWI served nearly 8.8 million domestic passenger arrivals and nearly 300,000 international arrivals this fiscal year through April. Total arrivals were steady compared to last year while international arrivals saw a 19 percent increase.

Amtrak

The Amtrak train system in Maryland recorded 749,900 non-commuter arrivals this fiscal year through April –0.9 percent more travelers than last year at this time.

Leisure and Hospitality Employment

Maryland's leisure and hospitality sector employment grew by 1.5 percent compared to last April, 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 1.9 percent; accommodations jobs remained mostly unchanged and food services jobs increased 1.5 percent. At the national level, the number of arts, entertainment and recreation jobs grew by 3.2 percent; accommodations jobs also remained mostly unchanged and food services saw a 3.7 percent increase.

	MD Jobs (thousands)*			U.S. Jobs (thousands)*		
	April FY 2013	April FY 2012	Change	April FY 2013	April FY 2012	Change
Arts, Entertainment, Recreation	34.71	34.06	1.9%	1,947.5	1,886.4	3.2%
Accommodation	23.32	23.21	0.5%	1,811.1	1,796.4	0.8%
Food Services	177.6	174.9	1.5%	10,048	9,687.3	3.7%
Total	235.6	232.2	1.5%	13,644.6	13,370.3	3.3%

* Employment figures not seasonally adjusted.

April 2012 figures for Maryland and the U.S. have been revised since the April 2012 Maryland Tourism Monitor was originally published last year.

Tourism Taxes

Preliminary sales and use tax data is now available for the first nine months of Fiscal Year 2013. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes grew 1.27 percent fiscal year to date, outperforming overall sales tax collections. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller – reflected a 1 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*	236,247,142	229,086,636	3.13%	33%	78,748,968	76,362,135	3.13%
111 Hotels, Motels Selling Food - W/BWL*	30,777,074	30,452,382	1.07%	100%	30,777,074	30,452,382	1.07%
112 Restaurants and Night Clubs - W/BWL*	178,885,756	179,202,723	-0.18%	33%	59,628,525	59,734,181	-0.18%
306 General Merchandise	117,202,225	115,842,868	1.17%	5%	5,860,111	5,792,143	1.17%
407 Automobile, Bus and Truck Rentals**	46,290,642	48,053,610	-3.67%	90%	41,661,578	43,248,249	-3.67%
706 Airlines - Commercial	203,010	256,085	-20.72%	50%	101,505	128,042	-20.73%
901 Hotels, Motels, Apartments, Cottages	65,284,665	63,394,473	2.98%	100%	65,284,665	63,394,473	2.98%
925 Recreation and Amusement Places	4,276,791	4,346,729	-1.61%	50%	2,138,395	2,173,364	-1.61%
Tourism Tax Categories Subtotal	679,167,306	670,635,509	1.27%	-	284,200,823	281,284,973	1.04%
All Sales Tax Categories Subtotal	3,049,609,073	3,043,871,310	0.19%				