

Maryland Tourism Monitor

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

Web Marketing Results

This year's web site visitation through May is up 32 percent compared to last fiscal year, according to Google Analytics. More than 450,000 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and over 23,000 requests for travel kits were received via the web site. The year's online advertising budget to date remained relatively the same as last year's.

<u>Request Type</u>	<u>FY 2013 YTD</u>	<u>FY 2012 YTD</u>	<u>Change</u>
VisitMaryland.org unique visitors	1,484,352	1,297,476	14.4%
Mobile site users	32,086	24,605	30.4%
SS200.org	29,001	40,583	-28.5%
SS200.com	28,913	119,506	-75.8%
Web advertising clicks	459,102	528,927	-13.2%
Web travel kit requests	23,107	16,837	37.2%
Online advertising budget to date	\$347,205	\$345,535	0.5%

E-newsletters

Consumer – More than 88,370 prospective visitors received the e-newsletter in May. The number of subscribers grew 36 percent compared to last May. Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 9100 subscribers in May – 2 percent less than last year.

Social Media Dashboard

The number of *TravelMD* Facebook fans has grown 133 percent this year compared to last May. OTD Twitter followers have grown 94 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 882 visitors to click to *VisitMaryland.org* and 591 Twitter followers were driven to the site in May. Facebook sent an additional 204 clicks to the online calendar and Twitter sent 248 users to this page.

	<u>May FY 2013</u>	<u>May FY 2012</u>	<u>Change</u>
Facebook Fans	15,970	6,836	133.6%
Twitter followers	15,769	8,141	93.7%

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 television ads ran in August and in May. This year through May, OTD's print advertising budget was 20 percent greater than the previous year; there was a corresponding 27 percent increase in advertising requests. Broadcast requests were almost 2 percent higher; with a year-to-date budget that was 73 percent larger. The top five lead-generating publications in May were *AAA Magazines*, *Southern Living*, *Better Homes & Gardens*, *Family Circle*, and *Ladies' Home Journal*.

<u>Request Type</u>	<u>FY13 YTD</u>	<u>FY12 YTD</u>	<u>Change</u>
Print advertising requests	41,353	32,574	26.9%
Print advertising budget	\$370,115	\$309,275	19.7%
Broadcast leads	5,541	5,448	1.7%
Broadcast advertising budget	\$789,024	\$456,094	73.0%

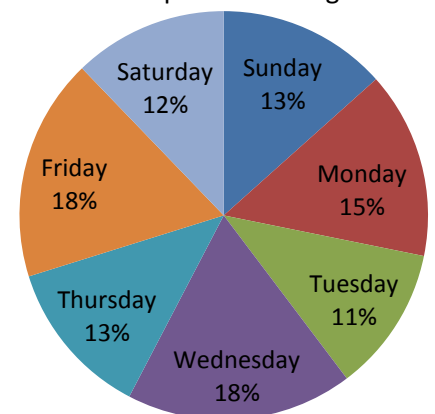
Welcome Centers

Nearly 298,450 travelers visited OTD-operated Maryland Welcome Centers this fiscal year through May. 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 Thursday through Sunday, 8:30 am to 4:30 pm. The I-95 Centers were open Wednesday through Sunday, 8:30 am to 4:30 pm and the Mason Dixon Center was open Wednesday through Sunday from 9:00 am to 5:00 pm.

Kiosk Use

Kiosks at the I-70 Welcome Centers have recorded over 2,700 sessions this year through May. 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



Maryland Tourism Monitor

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland during the first five months of 2013 declined almost 1 percent compared to a 2.8 percent increase across the US for the same time period. Maryland's lodging industry revenue remained relatively flat, (0.7 increase) while revenue from hotel rooms across the US increased by 7.1 percent.

Airports

BWI served over 9.8 million domestic passenger arrivals and over 350,000 international arrivals this fiscal year through May. Total arrivals declined slightly compared to last year while international arrivals saw a 19 percent increase.

Amtrak

The Amtrak train system in Maryland recorded 838,100 non-commuter arrivals this fiscal year through May – 1.2 percent more travelers than last year at this time.

Tourism Taxes

Preliminary sales and use tax data is now available for the first ten months of Fiscal Year 2013. According to the Maryland Comptroller's monthly tax collection reports, tourism-related codes grew 1.6 percent fiscal year to date, outperforming overall sales tax collections growth by more than 100 percent. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller – reflected a 1.2 percent growth, also outperforming overall collection gains.

TOTAL SALES TAX REVENUES (\$)				Tax Factor	TOURISM TAX REVENUES (\$)		
Sales Tax Category	FY 2013	FY 2012	% Change		FY 2013	FY 2012	% Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	264,937,432	256,529,637	3.3%	33%	88,312,477	85,509,879	3.3%
111 Hotels, Motels Selling Food - W/BWL*	34,381,177	34,001,278	1.1%	100%	34,381,177	34,001,278	1.1%
112 Restaurants and Night Clubs - W/BWL*	201,445,681	200,716,737	0.4%	33%	67,148,560	66,905,579	0.4%
306 General Merchandise	129,299,255	126,849,759	1.9%	5%	6,464,963	6,342,488	1.9%
407 Automobile, Bus and Truck Rentals**	51,007,548	53,131,798	-4.0%	90%	45,906,793	47,818,618	-4.0%
706 Airlines - Commercial	231,929	278,183	-16.6%	50%	115,964	139,091	-16.6%
901 Hotels, Motels, Apartments, Cottages	72,667,989	70,601,249	2.9%	100%	72,667,989	70,601,249	2.9%
925 Recreation and Amusement Places	4,696,102	4,816,561	-2.5%	50%	2,348,051	2,408,281	-2.5%
Tourism Tax Categories Subtotal	758,667,111	746,925,202	1.6%	-	317,345,974	313,726,463	1.2%
All Sales Tax Categories Subtotal	3,397,692,502	3,375,138,890	0.7%				

Leisure and Hospitality Employment

Maryland's leisure and hospitality sector employment grew by 3.6 percent compared to last May outperforming national growth trends, according to preliminary employment estimates from the U.S. Bureau of Labor Statistics. The industry saw the greatest gains in growth from the arts, entertainment and recreation sector which grew percent 5.6 percent; accommodations jobs declined slightly and food services jobs increased 3.8 percent. At the national level, the number of arts, entertainment and recreation jobs grew by 2.3 percent; accommodations jobs increased slightly and food services saw a 3.2 percent increase.

	MD Jobs (thousands)*			U.S. Jobs (thousands)*		
	May FY 2013	May FY 2012	Change	May FY 2013	May FY 2012	Change
Arts, Entertainment, Recreation	41.8	39.6	5.6%	2,160.1	2,110.9	2.3%
Accommodation	25.7	25.7	-0.3%	1,994.8	1,986.0	0.4%
Food Services	202.0	194.6	3.8%	11,093.8	10,741.7	3.2%
Total	269.6	260.0	3.6%	15,248.7	14,838.6	2.7%

* Employment figures not seasonally adjusted.

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