

Maryland Tourism Monitor

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

Web Marketing Results

OTD increased its online advertising budget 17 percent to offset the expected decline in FY 2013 performance measures, after the high volumes driven by Sailabration. In FY 2013, the number of unique web visitors to VisitMaryland.org grew 9 percent according to Google Analytics; the overall decline in unique web visitors was driven by a reduction of 420,000 in traffic to War of 1812/Sailabration websites. More than 600,000 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and over 28,000 requests for travel kits were received via the website, an increase of 44 percent from FY 2012.

<u>Request Type</u>	<u>FY 2013</u>	<u>FY 2012</u>	<u>Change</u>
VisitMaryland.org unique visitors	1,665,713	1,527,389	9.0%
Mobile site users	45,762	118,486	(61.4%)
SS200.org	33,356	68,775	(51.5%)
SS200.com	34,143	426,494	(92.0%)
Web advertising clicks	611,631	654,057	(6.5%)
Web travel kit requests	28,649	19,904	43.9%
Online advertising budget	\$572,925	\$488,677	17.2%

E-newsletters

Consumer – More than 126,000 prospective visitors received the e-newsletter in June 2013. The number of subscribers grew 70 percent compared to last June. Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 9,000 subscribers in June – 4 percent fewer than last year.

Social Media Dashboard

The number of *TravelMD* Facebook fans grew 105 percent in FY 2013. OTD Twitter followers grew 79 percent.

	<u>FY 2013</u>	<u>FY 2012</u>	<u>Change</u>
Facebook Fans	16,665	8,122	105.1%
Twitter followers	16,846	9,404	79.1%

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio, and TV advertising. In FY 2013, OTD continued the annual "Maryland Minute" radio sponsorship and Scenic Byways, Civil War Trails and Chesapeake Campaign television ads ran in August, May and June. OTD's print advertising budget was 18 percent higher than the previous year; there was a corresponding 27 percent increase in advertising requests. Broadcast requests declined slightly, with a year-to-date budget that was 57 percent larger. More and more travelers now use the web to gather travel information, instead of requesting printed travel information, after exposure to advertising.

<u>Request Type</u>	<u>FY 2013</u>	<u>FY 2012</u>	<u>Change</u>
Print advertising requests	48,385	38,225	26.6%
Print advertising budget	\$398,061	\$337,011	18.1%
Broadcast leads	6,075	6,089	(0.2%)
Broadcast advertising budget	\$1,294,940	\$822,989	57.3%

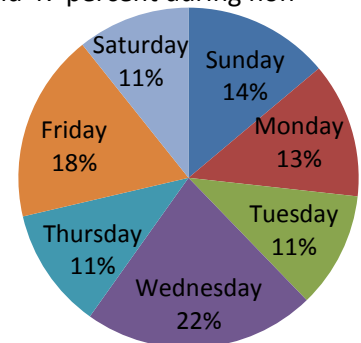
Welcome Centers

The Welcome Center program saw a 13 percent increase in the number of welcome center visitors in FY 2013, due in part to the Mason-Dixon Welcome Center being open for the entire fiscal year. In FY 2013, the five OTD-operated Maryland Welcome Centers (I-70 East, I-70 West, I-95 North, I-95 South and the Mason Dixon Center in Emmitsburg) received 332,500 visitors.

Kiosk Use

Kiosks at the I-70 Welcome Centers have recorded over 3,200 sessions this Fiscal Year. Usage occurred 53 percent of the time during business hours and 47 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 during the first six months of 2013 declined 1.6 percent compared to a 2.3 percent increase across the U.S. for the same time period. Maryland's lodging industry revenue remained relatively flat, while revenue from hotel rooms across the U.S. increased by 6.4 percent.

Airports

BWI served over 10.8 million domestic passenger arrivals and nearly 400,000 international arrivals this Fiscal Year. Total arrivals declined by 1.4 percent compared to last Fiscal Year while international arrivals saw a 20 percent increase.

Amtrak

The Amtrak train system in Maryland recorded a total of 925,400 non-commuter arrivals for Fiscal Year 2013. Compared to Fiscal Year 2012, the number of passengers grew 2 percent.

Tourism Taxes

The Bureau of Revenue Estimates recently reported actual tourism expenditures of \$392.0 million for Fiscal Year 2013; after adjusting for the sales tax increase on the sale of alcohol, these revenues totaled \$381.4 million. Adjusted tourism revenue increased 1 percent, outperforming the growth of overall sales tax categories.

Sales Tax Category	TOTAL SALES TAX REVENUES (\$)				Tax Factor	TOURISM TAX REVENUES (\$)		
	FY2013 With Alcohol Increase	FY 2013 Without Alcohol Increase	FY2012 With Alcohol Increase	FY 2012 Without Alcohol Increase		FY 2013 Without Alcohol Increase	FY 2012 Without Alcohol Increase	% Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	\$323.7	\$317.1	\$314.9	\$310.3	33%	\$105.7	\$103.4	2.2%
111 Hotels, Motels Selling Food - W/BWL*	\$42.8	\$41.9	\$43.5	\$42.4	100%	\$41.9	\$42.4	(1.3%)
112 Restaurants and Night Clubs - W/BWL*	\$247.0	\$227.4	\$245.9	\$222.3	33%	\$75.8	\$74.1	2.3%
306 General Merchandise	\$156.6	\$156.2	\$153.7	\$153.4	5%	\$7.8	\$7.7	1.8%
407 Automobile, Bus and Truck Rentals	\$62.4	\$62.4	\$64.4	\$64.4	90%	\$56.2	\$58.0	(3.2%)
706 Airlines - Commercial	\$0.3	\$0.3	\$0.3	\$0.3	50%	\$0.1	\$0.2	(14.3%)
901 Hotels, Motels, Apartments, Cottages	\$91.8	\$91.0	\$89.8	\$88.7	100%	\$91.0	\$88.7	2.5%
925 Recreation and Amusement Places	\$6.1	\$5.9	\$6.0	\$5.9	50%	\$3.0	\$2.9	1.1%
Tourism Tax Categories Subtotal	\$930.7	\$902.1	\$918.7	\$887.8		\$381.4	\$377.5	1%
All Sales Tax Categories Subtotal*		\$4,126.8		\$4,095.7				0.76%

*Figures for the overall Sales Tax categories for the entire state are provided by the Comptroller and not adjusted for the increase in the alcohol sales tax rate.

Leisure and Hospitality Employment

According to the U.S. Bureau of Labor Statistics, employment in Maryland's leisure and hospitality sector in June 2013 grew by 2.2 percent from June 2012. The industry saw the greatest employment gains in the arts, entertainment and recreation sector which grew 5 percent; accommodations jobs decreased 1 percent and food services jobs increased 2 percent. At the national level, the number of arts, entertainment and recreation jobs grew by 3.7 percent; accommodations jobs increased slightly and food services saw a 3.5 percent increase.

	MD Jobs (thousands)*			U.S. Jobs (thousands)*		
	June FY 2013	June FY 2012	Change	June FY 2013	June FY 2012	Change
Arts, Entertainment, Recreation	48.1	45.8	5.0%	2,294.9	2,211.1	3.7%
Accommodation	26.6	25.9	(1.1%)	1,933.3	1,916.8	.86%
Food Services	196.3	192.4	2.0%	10,545.0	10,183.0	3.5%
Total	271.0	265.1	2.2%	14,773.2	14,310.9	3.2%

* Employment figures not seasonally adjusted.

June 2013 figures are preliminary and subject to revision.