

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through August decreased 33 percent compared to last fiscal year, according to Google Analytics. More than 64,750 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and over 4,150 requests for travel kits were received via the web site. The year's online advertising budget to date was 20 percent lower than last year.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
VisitMaryland.org unique visitors	261,565	391,444	(33.2%)
Mobile site users	9,764	16,085	(39.3%)
SS200.org	5,717	5,797	(1.4%)
SS200.com	4,297	9,009	(52.3%)
Web advertising clicks	64,751	114,030	(43.2%)
Web travel kit requests	4,153	6,792	(38.9%)
Online advertising budget	\$ 42,711	\$ 54,024	(20.9%)

Newsletters

Consumer – More than 127,620 prospective visitors received the e-newsletter in August 2013. The number of subscribers grew 39 percent compared to last August. Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,500 subscribers in August – 10 percent fewer than last year.

Social Media

The number of *TravelMD* Facebook fans has grown almost 92 percent this year compared to last August. OTD Twitter followers have grown 76 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 519 visitors to click to *VisitMaryland.org* and 791 Twitter followers were driven to the site in August. Facebook sent an additional 117 clicks to the online calendar and Twitter sent 399 users to this page.

	August FY 2013	August FY 2012	Change
Facebook fans	33,717	17,588	91.7%
Twitter followers	34,338	19,477	76.3%

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. This fiscal year through August, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and television ads also ran. To date, OTD's print advertising budget was 12 percent lower than the previous year; there was a 1 percent decline in advertising requests. Broadcast requests increased 8 percent with a budget that was 73 percent lower. The top five lead-generating publications in August were: *Oprah*, *Southern Living*, *AAA Magazines*, *Civil War Traveler*, *Better Homes and Gardens*.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Print advertising requests	6,826	6,894	(1.0%)
Print advertising budget	\$ 34,209	\$ 39,022	(12.3%)
Broadcast leads	1,470	1,356	8.4%
Broadcast advertising budget	\$ 92,629	\$ 343,628	(73.0%)

Public Relations

This year through August 2013, public relations activities-press outreach, familiarization tours and visiting journalists- generated more than 2 million in advertising value for Maryland tourism products and services, a 70 percent decline from nearly 5.7 million last year.

Welcome Centers

Nearly 37,850 travelers visited OTD-operated Maryland Welcome Centers in August alone, a 3.6 percent increase from the previous year. During this fiscal year, welcome centers have received 75,146 visitors, an increase of 2.5 percent from last year. 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.

Kiosks at the I-70 Welcome Centers have recorded over 1027 sessions this fiscal year.

Amtrak

The Amtrak train system in Maryland recorded 152,100 non-commuter arrivals this fiscal year through August -2 percent more travelers than last year at this time.

BWI Airport

BWI served over one million domestic passenger arrivals and over 47,700 international arrivals in August 2013. During fiscal year 2014, total arrivals declined 2.3 percent compared to last year; while international arrivals saw a 28 percent increase.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 2 percent compared to last August. At the national level, August employment in these three industries also saw an overall increase of 3 percent

	August 2013	August 2012	Change
Arts, Entertainment, Recreation	47,000	45,500	3.3%
Accommodation	27,200	26,800	1.5%
Food Services	195,800	192,200	1.9%
Total	270,400	264,500	2.1%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in August 2013 declined slightly (0.6 percent), while room revenue saw a slight increase of 0.2 percent. At the national level, the number of rooms sold increased 3.1 percent and room revenue grew 7.6 percent.

Gaming Revenue (in millions)

This fiscal year through August 2013, gaming facilities generated over 101 million, a 9.6 percent increase from last year at this time. In the month of August alone, revenues reached \$71 million, an increase of 59 percent from last August's revenue of 44.63 million.

Casino	August FY 2014	August FY 2013	Change
Perryville, VLT	\$ 12.7	\$ 13.4	(-5.2%)
Perryville, Table	\$ 2.5	-	
Maryland Live, VLT	\$ 70.6	\$ 67.9	4.0%
Maryland Live, Table	\$ 35.3	-	
Ocean Downs, VLT	\$ 11.8	\$ 11.4	3.3%
Rocky Gap, VLT	\$ 6.5	-	
Rocky Gap, Table	\$ 0.9	-	
Combined Total	\$101.6	\$92.7	9.6%

Source: Maryland Lottery

Tourism Taxes

Sales and use tax data for the second month of Fiscal Year 2014 is now available. Tourism-related codes declined slightly while overall sales tax collections over the same time period grew 5.2 percent. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller also declined by 1.8 percent.

TOTAL SALES TAX REVENUES (\$)				TOURISM TAX REVENUES (\$)			
Sales Tax Category	August 2013	August 2012	Change	Factor	August 2013	August 2012	Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	\$ 28,413,900	\$ 27,625,629	2.9%	33%	\$ 9,471,300	\$ 9,208,543	2.9%
111 Hotels, Motels Selling Food - W/BWL*	\$ 4,462,692	\$ 4,482,140	(0.4)%	100%	\$ 4,462,692	\$ 4,482,140	(0.4)%
112 Restaurants and Night Clubs - W/BWL*	\$ 21,929,386	\$ 22,143,332	(1.0)%	33%	\$ 7,309,795	\$ 7,381,111	(1.0)%
306 General Merchandise	\$ 12,187,777	\$ 11,914,701	2.3%	5%	\$ 609,389	\$ 595,735	2.3%
407 Automobile, Bus and Truck Rentals**	\$ 5,203,827	\$ 6,089,611	(14.5)%	90%	\$ 4,683,444	\$ 5,480,650	(14.5)%
706 Airlines - Commercial	\$ 37,460	\$ 27,957	34.0%	50%	\$ 18,730	\$ 13,979	34.0%
901 Hotels, Motels, Apartments, Cottages	\$ 10,775,171	\$ 10,895,306	(1.1)%	100%	\$10,775,171	\$ 10,895,306	(1.1)%
925 Recreation and Amusement Places	\$ 661,731	\$ 654,930	1.0%	50%	\$ 330,865	\$ 327,465	1.0%
Tourism Tax Categories Subtotal	\$ 83,671,942	\$ 83,833,605	(0.2)%	-	\$ 37,661,386	\$ 38,384,927	(1.8)%
All Sales Tax Categories Subtotal	\$ 54,173,125	\$ 51,507,350	5.2%				

