

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through September decreased 27 percent compared to last fiscal year, according to Google Analytics. More than 118,925 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and over 5,400 requests for travel kits were received via the web site. The year's online advertising budget to date was 4 percent lower than last year.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
VisitMaryland.org unique visitors	399,524	548,575	(27.2%)
Mobile site users	14,141	21,284	(33.6%)
SS200.org	9,388	8,592	9.3%
SS200.com	6,529	11,963	(45.4%)
Web advertising clicks	118,928	162,765	(26.9%)
Web travel kit requests	5,457	8,505	(35.8%)
Online advertising budget	\$74,686	\$78,001	(4.2%)

Newsletters

Consumer – More than 126,970 prospective visitors received the e-newsletter in September 2013. The number of subscribers grew 39 percent compared to last September.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,400 subscribers in September – 12 percent fewer than last year.

Social Media

The number of *TravelMD* Facebook fans has grown almost 89 percent this year compared to last year. OTD Twitter followers have grown 74 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 638 visitors to click to *VisitMaryland.org* and 640 Twitter followers were driven to the site in September. Facebook sent an additional 170 clicks to the online calendar and Twitter sent 267 users to this page.

	FY 2014 YTD	FY 2013 YTD	Change
Facebook fans	34,045	18,011	89.0%
Twitter followers	34,834	20,032	73.9%

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. This fiscal year through September, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and television ads also ran in August. To date, OTD's print advertising budget was 23 percent lower than the previous year; there was an 8 percent decline in advertising requests. Broadcast requests also declined 5 percent with a budget that was 71 percent lower. The top five lead-generating publications in September were: *Southern Living*, *AAA Magazines*, *Civil War Traveler*, *Better Homes and Gardens*, and *Preservation*.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Print advertising requests	8,918	9,713	(8.2%)
Print advertising budget	\$81,260	\$106,112	(23.4%)
Broadcast leads	1,802	1,890	(4.7%)
Broadcast advertising budget	\$101,979	\$352,490	(71.1%)

Communications Efforts

This year through September 2013, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$ 3.5 million in advertising value for Maryland tourism products and services, a 57 percent decline from nearly \$ 8 million the previous year.

Welcome Centers

Close to 31,000 travelers visited OTD-operated Maryland Welcome Centers in September, a 6.5 percent decrease from the previous year. During this fiscal year, welcome centers have received 106,193 visitors, compared to 106,548 last year. These include two Welcome Centers on either side of I-70, open Thursday through Sunday, 8:30 am to 4:30 pm; two on I-95 south of Baltimore, open Wednesday through Sunday from 9:00 am to 5:00 pm; and the Mason Dixon Center in Emmitsburg, open Wednesday through Sunday from 9:00 am to 5:00 pm.

Kiosks at the I-70 Welcome Centers have recorded over 1,200 sessions this fiscal year, a 35 percent increase from last year.

Amtrak

The Amtrak train system in Maryland recorded 228,000 non-commuter arrivals this fiscal year through September – 1.9 percent fewer travelers than last year at this time.

BWI Airport

BWI served over one million domestic passenger arrivals and over 47,700 international arrivals in September 2013. During fiscal year 2014, total arrivals increased 5.6 percent compared to last year; while international arrivals saw a 36.5 percent increase.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 1.4 percent compared to last September. At the national level, September employment in these three industries also saw an overall increase of 3 percent

	FY 2014 YTD	FY 2013 YTD	Change
Arts, Entertainment, Recreation	136,100	132,700	2.6%
Accommodation	79,400	79,000	0.5%
Food Services	578,600	571,300	1.3%
Total	794,100	783,000	1.4%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in September 2013 declined 2 percent, while room revenue also saw a decrease of 2.8 percent. At the national level, the number of rooms sold increased slightly (0.9 percent) and room revenue grew 4.2 percent.

Gaming Revenue (in millions)

This fiscal year through September 2013, gaming facilities generated over \$ 203.1 million in revenue, an increase of 50 percent compared to last September. In the month of September alone, the combined revenue totaled \$ 65.3 million, an increase of 52 percent from last September's revenue of \$ 42.89 million.

Gaming Facility	FY 2014 YTD	FY 2013 YTD	Change
Perryville, VLT	\$ 18.3	\$ 19.4	(5.5%)
Perryville, Table	\$ 1.0	-	
Maryland Live, VLT	\$ 102.8	\$ 99.9	2.9%
Maryland Live, Table	\$ 53.5	-	
Ocean Downs, VLT	\$ 16.9	\$ 16.3	3.3%
Rocky Gap, VLT	\$ 9.2	-	
Rocky Gap, Table	\$ 1.4	-	
Combined Total	\$203.1	\$135.6	49.8%

Source: Maryland Lottery

Tourism Taxes

Sales and use tax data for the first two months of Fiscal Year 2014 is now available. Tourism-related codes increased 2.4 percent while overall sales tax collections over the same time period grew 1.7 percent. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller – also increased 1.6 percent.

Sales Tax Category	TOTAL SALES TAX REVENUES (\$)			Factor	TOURISM TAX REVENUES (\$)		
	FY 2014 YTD	FY 2013 YTD	Change		FY 2014 YTD	FY 2013 YTD	Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	\$57,142,188	\$55,058,978	3.8%	33%	\$19,047,396	\$18,352,993	3.8%
111 Hotels, Motels Selling Food - W/BWL*	\$8,742,390	\$8,918,384	(2.0%)	100%	\$8,742,390	\$8,918,384	(2.0%)
112 Restaurants and Night Clubs - W/BWL*	\$44,865,977	\$43,975,030	2.0%	33%	\$14,955,326	\$14,658,343	2.0%
306 General Merchandise	\$24,511,611	\$23,611,960	3.8%	5%	\$1,225,581	\$1,180,598	3.8%
407 Automobile, Bus and Truck Rentals**	\$12,055,717	\$12,405,623	(2.8%)	90%	\$10,850,145	\$11,165,060	(2.8%)
706 Airlines - Commercial	\$74,677	\$52,077	43.4%	50%	\$37,338	\$26,039	43.4%
901 Hotels, Motels, Apartments, Cottages	\$21,240,338	\$20,658,744	2.8%	100%	\$21,240,338	\$20,658,744	2.8%
925 Recreation and Amusement Places	\$1,282,975	\$1,194,570	7.4%	50%	\$641,487	\$597,285	7.4%
Tourism Tax Categories Subtotal	\$169,915,873	\$165,875,366	2.4%	-	\$76,740,001	\$75,557,446	1.6%
All Sales Tax Categories Subtotal	\$696,199,224	\$684,731,421	1.7%				