

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through October decreased 18 percent compared to last fiscal year, according to Google Analytics. More than 195,970 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and over 6,580 requests for travel kits were received via the web site. The year's online advertising budget to date was 1.4 percent greater than last year.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
VisitMaryland.org unique visitors	574,269	701,709	(18.2%)
Mobile site users	18,094	23,608	(23.4%)
SS200.org	13,262	11,274	17.6%
SS200.com	8,002	14,184	(43.6%)
Web advertising clicks	195,975	213,304	(8.1%)
Web travel kit requests	6,581	9,638	(31.7%)
Online advertising budget	\$163,720	\$ 161,499	1.4%

Newsletters

Consumer – More than 126,140 prospective visitors received the e-newsletter in October 2013. The number of subscribers grew 40 percent compared to last October. Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,300 subscribers in October – 12 percent fewer than last year.

Social Media

The number of *TravelMD* Facebook fans has grown almost 82 percent this year compared to last year. OTD Twitter followers have grown almost 71 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 719 visitors to click to *VisitMaryland.org* and 917 Twitter followers were driven to the site in October. Facebook sent an additional 221 clicks to the online calendar and Twitter sent 671 users to this page.

	FY 2014 YTD	FY 2013 YTD	Change
Facebook fans	34,407	18,919	81.9%
Twitter followers	35,335	20,717	70.6%

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. This fiscal year through October, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and television ads also ran in August. To date, OTD's print advertising budget was 17 percent lower than the previous year; there was a 6 percent decline in advertising requests. Broadcast requests also declined 10 percent with a budget that was 69 percent lower. The top five lead-generating publications in October were: *Southern Living*, *AAA Magazines*, *Civil War Traveler*, *Preservation*, and *Better Homes and Gardens*.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Print advertising requests	10,447	11,077	(5.7%)
Print advertising budget	\$ 88,410	\$ 106,372	(17.2%)
Broadcast leads	2,111	2,335	(9.6%)
Broadcast advertising budget	\$ 110,649	\$ 359,623	(69.2%)

Communications Efforts

This year through October 2013, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$ 3.7 million in advertising value for Maryland tourism products and services, a 53 percent decline from nearly \$ 8 million the previous year.

Welcome Centers

Close to 30,200 travelers visited OTD-operated Maryland Welcome Centers in October, a 3.5 percent decrease from the previous year. During this fiscal year, welcome centers have received 136,448 visitors, compared to 137,938 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 nearly 1,500 sessions this fiscal year, a 20 percent increase from last year.

Amtrak

The Amtrak train system in Maryland recorded 311,500 non-commuter arrivals this fiscal year through October – 2.8 percent more travelers than last year at this time.

BWI Airport

BWI served nearly 916,220 domestic passenger arrivals and over 35,000 international arrivals in October 2013. During fiscal year 2014, total arrivals have increased 5 percent compared to last year, while international arrivals saw a 29 percent increase.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 1 percent compared to last October. At the national level, employment through October in these three industries also saw an overall increase of 3 percent

	FY 2014 YTD	FY 2013 YTD	Change
Arts, Entertainment, Recreation	173,600	170,600	1.8%
Accommodation	103,300	102,800	0.5%
Food Services	763,900	756,800	0.9%
Total	1,040,600	1,030,200	1.0%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in October 2013 declined 2.7 percent, while room revenue saw a decrease of 4.3 percent. At the national level, the number of rooms sold increased slightly by 1.5 percent and room revenue grew 4.8 percent.

Gaming Revenue (in millions)

This fiscal year through October 2013, gaming facilities generated over \$ 272 million in revenue, an increase of 55 percent compared to last October. In the month of October alone, the combined revenue totaled \$66.4 million, an increase of 68 percent from last October's revenue of \$40 million.

Gaming Facility	FY 2014 YTD	FY 2013 YTD	Change
Perryville, VLT	\$ 24.2	\$ 24.9	(2.7%)
Perryville, Table	\$ 4.5		
Maryland Live, VLT	\$ 136.2	\$ 130.5	4.4%
Maryland Live, Table	\$ 71.9		
Ocean Downs, VLT	\$ 21.1	\$ 19.8	6.5%
Rocky Gap, VLT	\$ 12.1		
Rocky Gap, Table	\$ 1.9		
Combined Total	\$ 272.0	\$ 175.2	55.2%

Source: Maryland Lottery

Tourism Taxes

Sales and use tax data for the first four months of Fiscal Year 2014 is now available. Tourism-related codes increased 2.7 percent while overall sales tax collections over the same time period grew 2 percent. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller – increased 1.6 percent

Sales Tax Category	TOTAL SALES TAX REVENUES (\$)			Factor	TOURISM TAX REVENUES (\$)		
	FY2014 YTD	FY2013 YTD	Change		FY2014 YTD	FY2013 YTD	Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	\$112,839,483	\$108,497,235	4.0%	33%	\$37,613,161	\$36,165,745	4.0%
111 Hotels, Motels Selling Food - W/BWL*	\$16,372,792	\$16,831,793	(2.7%)	100%	\$16,372,792	\$16,831,793	(2.7%)
112 Restaurants and Night Clubs - W/BWL*	\$84,934,994	\$84,043,195	1.1%	33%	\$28,311,665	\$28,014,398	1.1%
306 General Merchandise	\$50,493,876	\$47,618,390	6.0%	5%	\$2,524,694	\$2,380,919	6.0%
407 Automobile, Bus and Truck Rentals**	\$22,441,470	\$22,653,004	(0.9%)	90%	\$20,197,323	\$20,387,704	(0.9%)
706 Airlines - Commercial	\$128,999	\$79,021	63.2%	50%	\$64,499	\$39,511	63.2%
901 Hotels, Motels, Apartments, Cottages	\$37,970,195	\$36,946,384	2.8%	100%	\$37,970,195	\$36,946,384	2.8%
925 Recreation and Amusement Places	\$2,259,596	\$2,212,532	2.1%	50%	\$1,129,798	\$1,106,266	2.1%
Tourism Tax Categories Subtotal	\$327,441,406	\$318,881,553	2.7%	-	\$144,184,128	\$141,872,720	1.6%
All Sales Tax Categories Subtotal	\$1,393,389,591	\$1,366,095,110	2.0%				