

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through November decreased 13 percent compared to last fiscal year, according to Google Analytics. More than 282,560 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and over 7,360 requests for travel kits were received via the web site. The year's online advertising budget to date was 2 percent greater than last year, but overall advertising expenditures were down 35.2 percent.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
VisitMaryland.org unique visitors	697,904	803,490	(13.1%)
Mobile site users	21,283	25,208	(15.6%)
SS200.org	16,343	13,601	20.2%
SS200.com	9,400	15,856	(40.7%)
Web advertising clicks	282,561	239,296	18.1%
Web travel kit requests	7,367	10,352	(28.8%)
Online advertising budget	\$190,629	\$186,752	2.1%

Newsletters

Consumer – More than 125,460 prospective visitors received the e-newsletter in November 2013. The number of subscribers grew 43 percent from last November. Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,320 subscribers in November – 11 percent fewer than last year.

Social Media

The number of *TravelMD* Facebook fans has grown almost 76 percent this year compared to last year. OTD Twitter followers have grown almost 70 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 278 visitors to click to *VisitMaryland.org* and 567 Twitter followers were driven to the site in November. Facebook sent an additional 53 clicks to the online calendar and Twitter sent 303 users to this page.

	FY 2014 YTD	FY 2013 YTD	Change
Facebook fans	34,711	19,783	75.5%
Twitter followers	36,020	21,255	69.5%

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. This fiscal year through November, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and television ads also ran in August. To date, OTD's print advertising budget was 9 percent greater than the previous year; there was a 7 percent decline in advertising requests. Broadcast requests also declined 10 percent with a budget that was 68 percent lower. The top five lead-generating publications in November were: *Southern Living*, *AAA Magazines*, *Civil War Traveler*, *Better Homes and Gardens*, and *Maryland Life*.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Print advertising requests	11,639	12,543	(7.2%)
Print advertising budget	\$122,714	\$112,374	9.2%
Broadcast leads	2,363	2,616	(9.7%)
Broadcast advertising budget	\$118,299	\$366,756	(67.7%)

Communications Efforts

This year through November 2013, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$ 4.1 million in advertising value for Maryland tourism products and services, a 51 percent decline YTD from nearly \$ 8.4 million the previous year.

Welcome Centers

Close to 18,900 travelers visited OTD-operated Maryland Welcome Centers in November, a 2 percent decrease from the previous year. During this fiscal year, welcome centers have received 155,338 visitors, compared to 158,018 last year. These include two Welcome Centers on either side of I-70, open Friday through Sunday, 8:30 am to 4:30 pm; two on I-95 south of Baltimore, open Thursday through Sunday from 9:00 am to 5:00 pm; and the Mason Dixon Center in Emmitsburg, open Thursday through Sunday from 9:00 am to 5:00 pm.

Kiosks at the I-70 Welcome Centers have recorded nearly 1,560 sessions this fiscal year, a 7.3 percent increase from last year.

Amtrak

The Amtrak train system in Maryland recorded 398,100 non-commuter arrivals this fiscal year through November – 5.5 percent more travelers than last year at this time.

BWI Airport

BWI served nearly 935,800 domestic passenger arrivals and over 34,400 international arrivals in November 2013. During fiscal year 2014, total arrivals have increased 3.2 percent compared to last year; while international arrivals saw a 26.5 percent increase.

Leisure and Hospitality Employment

Employment in Maryland’s Leisure and Hospitality sector grew almost 1 percent compared to last November. At the national level, employment through November in these three industries also saw an overall increase of 3.4 percent

	FY 2014 YTD	FY 2013 YTD	Change
Arts, Entertainment, Recreation	208,600	205,400	1.6%
Accommodation	126,000	125,400	0.5%
Food Services	944,800	939,100	0.6%
Total	1,279,400	1,269,900	0.7%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in November 2013 increased 4.1 percent, while room revenue saw an increase of 5.8 percent. At the national level, the number of rooms sold increased by 2.8 percent and room revenue grew 5.4 percent.

Gaming Revenue (in millions)

This fiscal year through November 2013, gaming facilities generated over \$ 338 million in revenue, an increase of 55 percent compared to last November. In the month of November alone, the combined revenue totaled \$66.8 million, an increase of 47.4 percent from last November’s revenue of \$46.4 million.

Gaming Facility	FY 2014 YTD	FY 2013 YTD	Change
Perryville, VLT	\$ 29.7	\$ 30.3	(1.9%)
Perryville, Table	\$ 5.6		
Maryland Live, VLT	\$ 170.4	\$ 164.8	3.4%
Maryland Live, Table	\$ 91.0		
Ocean Downs, VLT	\$ 24.6	\$ 23.1	6.3%
Rocky Gap, VLT	\$ 14.9		
Rocky Gap, Table	\$ 2.3		
Combined Total	\$ 338.8	\$ 218.3	55.2%

Source: Maryland Lottery

Tourism Taxes

Sales and use tax data for the first five months of Fiscal Year 2014 is now available. Tourism-related codes increased 1.5 percent while overall sales tax collections over the same time period declined 0.1 percent. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller – increased 1.7 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*	\$137,959,581	\$132,681,603	4.0%	33%	\$45,986,527	\$44,227,201	4.0%
111 Hotels, Motels Selling Food - W/BWL*	\$19,304,801	\$19,733,235	(2.2%)	100%	\$19,304,801	\$19,733,235	(2.2%)
112 Restaurants and Night Clubs - W/BWL*	\$103,209,353	\$101,070,315	2.1%	33%	\$34,403,118	\$33,690,105	2.1%
306 General Merchandise	\$60,044,941	\$62,056,255	(3.2%)	5%	\$3,002,247	\$3,102,813	(3.2%)
407 Automobile, Bus and Truck Rentals**	\$27,050,655	\$27,716,717	(2.4%)	90%	\$24,345,590	\$24,945,045	(2.4%)
706 Airlines - Commercial	\$146,531	\$98,717	48.4%	50%	\$73,266	\$49,359	48.4%
901 Hotels, Motels, Apartments, Cottages	\$43,738,166	\$42,326,765	3.3%	100%	\$43,738,166	\$42,326,765	3.3%
925 Recreation and Amusement Places	\$2,622,646	\$2,527,369	3.8%	50%	\$1,311,323	\$1,263,684	3.8%
Tourism Tax Categories Subtotal	\$394,076,674	\$388,210,976	1.5%	-	\$172,165,037	\$169,338,207	1.7%
All Sales Tax Categories Subtotal	\$1,692,263,415	\$1,693,685,398	(0.1%)				