

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through December decreased 10 percent compared to last fiscal year, according to Google Analytics. More than 313,600 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and over 8,100 requests for travel kits were received via the web site. The year's online advertising budget to date was 4 percent greater than last year, but overall advertising expenditures were down 37 percent.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
VisitMaryland.org unique visitors	803,903	894,305	(10.1%)
Mobile site users	23,916	26,589	(10.1%)
SS200.org	19,360	15,711	23.2%
SS200.com	11,140	17,999	(38.1%)
Web advertising clicks	313,636	256,608	22.2%
Web travel kit requests	8,190	10,955	(25.2%)
Online advertising budget	\$203,565	\$196,551	3.6%

Newsletters

Consumer – More than 125,200 prospective visitors received the e-newsletter in December 2013. The number of subscribers grew 40 percent from last December. Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,200 subscribers in December– 13 percent fewer than last year.

Social Media

The number of *TravelMD* Facebook fans has grown almost 71 percent this year compared to last year. OTD Twitter followers have grown almost 67 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 427 visitors to click to *VisitMaryland.org* and 598 Twitter followers were driven to the site in December. Facebook sent an additional 111 clicks to the online calendar and Twitter sent 342 users to this page.

	FY 2014 YTD	FY 2013 YTD	Change
Facebook fans	34,987	20,476	70.9%
Twitter followers	36,431	21,828	66.9%

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. This fiscal year through December, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and television ads also ran in August 2013. To date, OTD's print advertising budget was 20 percent lower than the previous year; there was a 7 percent decline in advertising requests. Broadcast requests also declined 10 percent with a budget that was 65 percent lower. The top five lead-generating publications in December were: *Southern Living*, *Civil War Traveler*, *Better Homes and Gardens*, *New York Car and Travel*, and *Maryland Life*.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Print advertising requests	12,421	13,320	(6.7%)
Print advertising budget	\$127,436	\$158,471	(19.6%)
Broadcast leads	2,624	2,926	(10.3%)
Broadcast advertising budget	\$132,692	\$375,672	(64.7%)

Communications Efforts

This year through December 2013, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$ 4.8 million in advertising value for Maryland tourism products and services, a 44 percent decline from nearly \$ 8.5 million the previous year.

Welcome Centers

Close to 14,050 travelers visited OTD-operated Maryland Welcome Centers in December, an 18 percent decrease from the previous year. During this fiscal year, welcome centers have received 169,386 visitors, compared to 175,070 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 1,654 sessions this fiscal year, on par with last year's 1,658.

Amtrak

The Amtrak train system in Maryland recorded 480,400 non-commuter arrivals this fiscal year through December—almost 6 percent more travelers than last year at this time.

BWI Airport

BWI served over 875,400 domestic passenger arrivals and over 36,300 international arrivals in December 2013. During fiscal year 2014, total arrivals have increased almost 4 percent compared to last year; while international arrivals saw a 26 percent increase.

Leisure and Hospitality Employment

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

	FY 2014 YTD	FY 2013 YTD	Change
Arts, Entertainment, Recreation	242,600	239,400	1.3%
Accommodation	148,300	147,200	0.7%
Food Services	1,128,300	1,120,100	0.7%
Total	1,519,200	1,506,700	0.8%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in December 2013 increased 0.1 percent, while room revenue saw a decrease of 0.9 percent. At the national level, the number of rooms sold increased by 3.6 percent and room revenue grew 7.6 percent.

Gaming Revenue (in millions)

This fiscal year through December 2013, gaming facilities generated over \$ 403 million in revenue, an increase of 53 percent compared to last year. In the month of December alone, the combined revenue totaled \$65 million, an increase of 44 percent from last December’s revenue of \$45.2 million.

Gaming Facility	FY 2014 YTD	FY 2013 YTD	Change
Perryville, VLT	\$ 35.1	\$ 36.2	(3.1%)
Perryville, Table	\$ 6.7		
Maryland Live, VLT	\$ 202.8	\$ 200.8	1.0%
Maryland Live, Table	\$ 111.3		
Ocean Downs, VLT	\$ 28.0	\$ 26.4	5.7%
Rocky Gap, VLT	\$ 17.2		
Rocky Gap, Table	\$ 2.8		
Combined Total	\$ 403.8	\$ 263.5	53.2%

Source: Maryland Lottery

Tourism Taxes

Sales and use tax data for the first six months of Fiscal Year 2014 is now available. Tourism-related codes increased 2.6 percent while overall sales tax collections over the same time period grew 2.4 percent. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller –increased 1 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*	\$167,694,368	\$160,263,901	4.6%	33%	\$55,898,123	\$53,421,300	4.6%
111 Hotels, Motels Selling Food - W/BWL*	\$21,504,220	\$22,788,275	(5.6%)	100%	\$21,504,220	\$22,788,275	(5.6%)
112 Restaurants and Night Clubs - W/BWL*	\$123,449,270	\$121,934,819	1.2%	33%	\$41,149,757	\$40,644,940	1.2%
306 General Merchandise	\$85,670,627	\$81,376,556	5.3%	5%	\$4,283,531	\$4,068,828	5.3%
407 Automobile, Bus and Truck Rentals**	\$32,284,473	\$32,892,457	(1.8%)	90%	\$29,056,026	\$29,603,211	(1.8%)
706 Airlines - Commercial	\$199,605	\$126,416	57.9%	50%	\$99,803	\$63,208	57.9%
901 Hotels, Motels, Apartments, Cottages	\$48,854,027	\$48,237,578	1.3%	100%	\$48,854,027	\$48,237,578	1.3%
925 Recreation and Amusement Places	\$3,146,304	\$2,980,451	5.6%	50%	\$1,573,152	\$1,490,225	5.6%
Tourism Tax Categories Subtotal	\$482,802,895	\$470,600,454	2.6%	-	\$202,418,638	\$200,317,566	1.0%
All Sales Tax Categories Subtotal	\$2,149,842,664	\$2,099,156,877	2.4%				