

Maryland Tourism Monitor

Recap of Maryland's travel & tourism trends, monitored by the Office of Tourism Development (Data through January 2014)

Web Marketing

This year's web site visitation through January decreased 10 percent compared to last fiscal year, according to Google Analytics. More than 341,700 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and over 9,870 requests for travel kits were received via the web site. The year's online advertising budget to date was 3 percent greater than last year, but overall advertising expenditures were down 35 percent.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
VisitMaryland.org unique visitors	883,496	983,262	(10.1%)
Mobile site users	27,407	28,460	(3.7%)
SS200.org	24,760	18,494	33.9%
SS200.com	15,918	19,694	(19.2%)
Web advertising clicks	341,750	280,119	22.0%
Web travel kit requests	9,878	12,806	(22.9%)
Online advertising budget	\$213,307	\$206,391	3.4%

Newsletters

Consumer – More than 124,600 prospective visitors received the e-newsletter in January 2014. The number of subscribers grew almost 40 percent from last January. Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,240 subscribers in January – 9 percent fewer than last year.

Social Media

The number of *TravelMD* Facebook fans has grown almost 65 percent this year compared to last year. OTD Twitter followers have grown almost 64 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 233 visitors to click to *VisitMaryland.org* and 549 Twitter followers were driven to the site in January. Facebook sent an additional 71 clicks to the online calendar and Twitter sent 186 users to this page.

	FY 2014 YTD	FY 2013 YTD	Change
Facebook fans	35,289	21,454	64.5%
Twitter followers	36,948	22,554	63.8%

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. This fiscal year through January, 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 19 percent lower than the previous year; there was a 10 percent decline in advertising requests. Broadcast requests also declined 9 percent with a budget that was 63 percent lower. The top five lead-generating publications in January were: *Southern Living*, *AAA World*, *Civil War Traveler*, *AAA Journey* and *Better Homes and Gardens*.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Print advertising requests	14,098	15,364	(10.2%)
Print advertising budget	\$137,177	\$168,303	(18.5%)
Broadcast leads	3,035	3,324	(8.7%)
Broadcast advertising budget	\$141,319	\$382,584	(63.1%)

Communications Efforts

This year through January 2014, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$ 5.1 million in advertising value for Maryland tourism products and services, a 51 percent decline from nearly \$ 10.6 million the previous year.

Welcome Centers

Close to 7,065 travelers visited OTD-operated Maryland Welcome Centers in January, a 58 percent decrease from the previous year. During this fiscal year, welcome centers have received 176,454 visitors, compared to 191,838 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 1,712 sessions this fiscal year, on par with last year's 1,715.

Amtrak

The Amtrak train system in Maryland recorded 543,700 non-commuter arrivals this fiscal year through January – 4 percent more travelers than last year at this time.

BWI Airport

BWI served over 716,180 domestic passenger arrivals and over 31,200 international arrivals in January 2014. During fiscal year 2014, total arrivals have increased 3 percent compared to last year; while international arrivals have seen a 24 percent increase.

Leisure and Hospitality Employment

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

	FY 2014 YTD	FY 2013 YTD	Change
Arts, Entertainment, Recreation	277,400	272,400	1.8%
Accommodation	170,300	168,000	1.4%
Food Services	1,308,100	1,295,900	0.9%
Total	1,755,800	1,736,300	1.1%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in January 2014 decreased 1.2 percent, while room revenue saw a decrease of 7.7 percent. At the national level, the number of rooms sold increased by 3.3 percent and room revenue grew 6.3 percent.

Gaming Revenue (in millions)

This fiscal year through January 2014, gaming facilities generated over \$ 470 million in revenue, an increase of 53 percent compared to last year. In the month of January alone, the combined revenue totaled \$66 million, an increase of 50 percent from last January’s revenue of \$44.3 million.

Gaming Facility	FY 2014 YTD	FY 2013 YTD	Change
Perryville, VLT	\$ 40.4	\$ 41.7	(3.0%)
Perryville, Table	\$ 7.7		
Maryland Live, VLT	\$ 235.6	\$ 236.7	(0.5%)
Maryland Live, Table	\$ 132.2		
Ocean Downs, VLT	\$ 31.2	\$ 29.4	5.9%
Rocky Gap, VLT	\$ 19.6		
Rocky Gap, Table	\$ 3.4		
Combined Total	\$ 470.1	\$ 307.8	52.7%

Source: Maryland Lottery

Tourism Taxes

Sales and use tax data for the first seven months of Fiscal Year 2014 is now available. Tourism-related codes increased 2.1 percent while overall sales tax collections over the same time increased 1.6 percent. Adjusted tourism codes – the amount deemed attributable to tourism by the Comptroller –increased 0.7 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*	\$192,190,862	\$185,131,497	3.8%	33%	\$64,063,621	\$61,710,499	3.8%
111 Hotels, Motels Selling Food - W/BWL*	\$23,525,162	\$25,089,413	(6.2%)	100%	\$23,525,162	\$25,089,413	(6.2%)
112 Restaurants and Night Clubs - W/BWL*	\$140,115,677	\$139,355,442	0.5%	33%	\$46,705,226	\$46,451,814	0.5%
306 General Merchandise	\$96,854,613	\$92,369,645	4.9%	5%	\$4,842,731	\$4,618,482	4.9%
407 Automobile, Bus and Truck Rentals**	\$37,082,373	\$37,516,028	(1.2%)	90%	\$33,374,136	\$33,764,425	(1.2%)
706 Airlines - Commercial	\$226,310	\$156,451	44.7%	50%	\$113,155	\$78,226	44.7%
901 Hotels, Motels, Apartments, Cottages	\$53,964,171	\$53,447,853	1.0%	100%	\$53,964,171	\$53,447,853	1.0%
925 Recreation and Amusement Places	\$3,543,183	\$3,428,421	3.3%	50%	\$1,771,592	\$1,714,211	3.3%
Tourism Tax Categories Subtotal	\$547,502,351	\$536,494,750	2.1%	-	\$228,359,792	\$226,874,922	0.7%
All Sales Tax Categories Subtotal	2,443,000,815	2,405,100,476	1.6%				