

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through February decreased 11 percent compared to last fiscal year, according to Google Analytics. More than 369,850 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and over 11,180 requests for travel kits have been received via the web site. The year's online advertising budget to date is 3 percent greater than last year, but overall advertising expenditures were down 36 percent.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
VisitMaryland.org unique visitors	959,438	1,073,223	(10.6%)
Mobile site users	30,540	30,280	0.9%
SS200.org	29,842	21,008	42.1%
SS200.com	19,379	21,716	(10.8%)
Web advertising clicks	369,857	305,370	21.1%
Web travel kit requests	11,189	14,682	(23.8%)
Online advertising budget	\$ 223,271	\$ 216,047	3.3%

Newsletters

Consumer – More than 124,140 prospective visitors received the e-newsletter in February 2014. The number of subscribers grew almost 42 percent from last year.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,200 subscribers in February – 11 percent fewer than last year.

Social Media

The number of *TravelMD* Facebook fans has grown almost 59 percent this year compared to last year. OTD Twitter followers have grown almost 62 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 127 visitors to click to *VisitMaryland.org* and 471 Twitter followers were driven to the site in February. Facebook sent an additional 178 clicks to the online calendar and Twitter sent 346 users to this page.

	FY 2014 YTD	FY 2013 YTD	Change
Facebook fans	35,526	22,411	58.5%
Twitter followers	37,605	23,230	61.9%

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. This fiscal year through February, 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 25 percent lower than the previous year; there was a 12 percent decline in advertising requests. Broadcast requests also declined 7 percent with a budget that was 64 percent lower. The top five lead-generating publications in February were: *Southern Living*, *Civil War Traveler*, *AAA Horizons*, *Better Homes and Gardens* and *Preservation*.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Print advertising requests	15,608	17,807	(12.3%)
Print advertising budget	\$ 127,436	\$ 168,976	(24.6%)
Broadcast leads	3,411	3,684	(7.4%)
Broadcast advertising budget	\$ 141,319	\$ 389,496	(63.7%)

Communications Efforts

This year through February 2014, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$ 5.4 million in advertising value for Maryland tourism products and services, a 49 percent decline from nearly \$ 10.7 million the previous year.

Welcome Centers

Close to 8,240 travelers visited OTD-operated Maryland Welcome Centers in February, a 46 percent decrease from the previous year. During this fiscal year, Welcome Centers have received 184,698 visitors, compared to 207,175 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 1,761 sessions this fiscal year, 4 percent less than last year's 1,842.

Amtrak

The Amtrak train system in Maryland recorded 604,500 non-commuter arrivals this fiscal year through February – 3.3 percent more travelers than last year at this time.

BWI Airport

BWI served over 646,850 domestic passenger arrivals and over 28,270 international arrivals in February 2014. During fiscal year 2014, total arrivals have increased 2 percent compared to last year; while international arrivals have seen a 23 percent increase.

Leisure and Hospitality Employment

Employment in Maryland’s Leisure and Hospitality sector grew 1.6 percent compared to last February. At the national level, employment though February in these three industries also saw an overall increase of 3 percent.

	FY 2014 YTD	FY 2013 YTD	Change
Arts, Entertainment, Recreation	312,400	305,300	2.3%
Accommodation	192,600	189,000	1.9%
Food Services	1,491,700	1,471,700	1.4%
Total	1,996,700	1,966,000	1.6%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in February 2014 increased 6.3 percent, while room revenue saw an increase of 5.7 percent. At the national level, the number of rooms sold increased by 4.2 percent and room revenue grew 8.2 percent.

Gaming Revenue (in millions)

This fiscal year through February 2014, gaming facilities generated over \$ 536 million in revenue, an increase of 51 percent compared to last year. In the month of February alone, the combined revenue totaled \$ 66 million, an increase of 38 percent from last February’s revenue of \$ 48 million.

Gaming Facility	FY 2014 YTD	FY 2013 YTD	Change
Perryville, VLT	\$ 46.3	\$ 47.6	(2.8%)
Perryville, Table	\$ 8.8		
Maryland Live, VLT	\$ 269.6	\$ 275.1	(2.0%)
Maryland Live, Table	\$ 150.5		
Ocean Downs, VLT	\$ 34.6	\$ 32.8	5.4%
Rocky Gap, VLT	\$ 22.3		
Rocky Gap, Table	\$ 3.8		
Combined Total	\$ 536.1	\$ 355.6	50.7%

Source: Maryland Lottery

Tourism Taxes

Sales and use tax data for the first eight months of Fiscal Year 2014 is now available. Tourism-related tax codes increased 2.1 percent while overall sales tax collections over the same time period grew 1.9 percent. Adjusted tourism tax 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*	\$216,584,866	\$209,034,714	3.6%	33%	\$72,194,955	\$69,678,238	3.6%
111 Hotels, Motels Selling Food - W/BWL*	\$25,776,489	\$27,565,715	(6.5%)	100%	\$25,776,489	\$27,565,715	(6.5%)
112 Restaurants and Night Clubs - W/BWL*	\$157,970,275	\$157,647,178	0.2%	33%	\$52,656,758	\$52,549,059	0.2%
306 General Merchandise	\$108,211,068	\$103,450,626	4.6%	5%	\$5,410,553	\$5,172,531	4.6%
407 Automobile, Bus and Truck Rentals**	\$41,491,420	\$41,652,163	(0.4%)	90%	\$37,342,278	\$37,486,947	(0.4%)
706 Airlines - Commercial	\$241,674	\$173,181	39.5%	50%	\$120,837	\$86,591	39.5%
901 Hotels, Motels, Apartments, Cottages	\$59,156,218	\$58,468,567	1.2%	100%	\$59,156,218	\$58,468,567	1.2%
925 Recreation and Amusement Places	\$3,954,964	\$3,818,813	3.6%	50%	\$1,977,482	\$1,909,407	3.6%
Tourism Tax Categories Subtotal	\$547,502,351	\$536,494,750	2.1%	-	\$254,635,571	\$252,917,055	0.7%
All Sales Tax Categories Subtotal	\$613,386,975	\$601,810,957	1.9%				