

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through March decreased 7 percent compared to last fiscal year, according to Google Analytics. More than 420,800 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 13,000 requests for travel kits have been received via the web site. The year's online advertising budget to date is 10 percent greater than last year, but overall advertising expenditures were down 29 percent.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Website unique visitors*	1,165,463	1,254,513	(7.0%)
Web advertising clicks	420,804	330,303	27.4%
Web travel kit requests	12,912	16,780	(23.1%)
Online advertising budget	\$ 248,766	\$ 225,864	10.1%

Newsletters

Consumer – More than 123,800 prospective visitors received the e-newsletter in March 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 8,300 subscribers in March – 11 percent fewer than last year.

Social Media

The number of *TravelMD* Facebook fans has grown over 54 percent this year compared to last year. OTD Twitter followers have grown 61 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 418 visitors to click to *VisitMaryland.org* and 722 Twitter followers were driven to the site in March. Facebook sent an additional 123 clicks to the online calendar and Twitter sent 416 users to this page.

	FY 2014 YTD	FY 2013 YTD	Change
Facebook fans	35,822	23,251	54.1%
Twitter followers	38,419	23,851	61.1%

* The performance measure includes the following web sites: www.visitmaryland.org, www.SS200.com, www.SS200.org, and www.visitmd.mobi.

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. This fiscal year through March, 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 9 percent lower than the previous year; there was a 26 percent decline in advertising requests. Broadcast requests also declined 12 percent with a budget that was 62 percent lower. The top five lead-generating publications in March were: *Southern Living*, *Civil War Traveler*, *AAA Home and Away*, *AAA New York Car and Travel* and *Coastal Living*.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Print advertising requests	17,806	24,054	(25.9%)
Print advertising budget	\$ 197,226	\$ 217,667	(9.4%)
Broadcast leads	3,890	4,434	(12.3%)
Broadcast advertising budget	\$ 152,157	\$ 398,412	(61.8%)

Communications Efforts

This year through March 2014, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$ 5.7 million in advertising value for Maryland tourism products and services, a 48 percent decline from nearly \$ 10.9 million the previous year.

Welcome Centers

Close to 18,160 travelers visited OTD-operated Maryland Welcome Centers in March, a 23 percent decrease from the previous year. During this fiscal year, Welcome Centers have received close to 202,850 visitors, compared to 230,830 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 1,836 sessions this fiscal year, 8 percent less than last year's 2,004.

Amtrak

The Amtrak train system in Maryland recorded 678,900 non-commuter arrivals this fiscal year through March – 1.7 percent more travelers than last year at this time.

BWI Airport

BWI served over 889,100 domestic passenger arrivals and over 39,180 international arrivals in March 2014. During fiscal year 2014, total arrivals have increased 0.7 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 1.9 percent compared to last March. At the national level, employment through March in these three industries also saw an overall increase of 3.2 percent.

	FY 2014 YTD	FY 2013 YTD	Change
Arts, Entertainment, Recreation	348,700	339,500	2.7%
Accommodation	215,400	210,600	2.3%
Food Services	1,678,100	1,650,900	1.6%
Total	2,242,200	2,201,000	1.9%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in March 2014 increased 2.0 percent, while room revenue saw an increase of 3.2 percent. At the national level, the number of rooms sold increased by 3.8 percent and room revenue grew 8.1 percent.

Gaming Revenue (in millions)

This fiscal year through March 2014, gaming facilities generated over \$ 613.9 million in revenue, an increase of 48 percent compared to last year. In the month of March alone, the combined revenue totaled nearly \$ 78 million, an increase of 34 percent from last March’s revenue of \$58 million.

Gaming Facility	FY 2014 YTD	FY 2013 YTD	Change
Perryville, VLT	\$ 53.1	\$ 55.6	(4.6%)
Perryville, Table	\$ 9.9	\$ 1.4	581.0%
Maryland Live, VLT	\$ 307.7	\$ 319.6	(3.7%)
Maryland Live, Table	\$ 174.1		
Ocean Downs, VLT	\$ 38.8	\$ 36.8	5.4%
Rocky Gap, VLT	\$ 25.6		
Rocky Gap, Table	\$ 4.4		
Combined Total	\$ 613.9	\$ 413.6	48.4%

Source: Maryland Lottery

Tourism Taxes

Sales and use tax data for the first nine months of Fiscal Year 2014 is now available. Tourism-related tax codes increased 2.3 percent while overall sales tax collections over the same time period grew 1.5 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller – increased 1.2 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*	\$245,774,321	\$236,247,142	4.0%	33%	\$81,924,774	\$78,749,047	4.0%
111 Hotels, Motels Selling Food - W/BWL*	\$29,038,408	\$30,777,074	(5.6%)	100%	\$29,038,408	\$30,777,074	(5.6%)
112 Restaurants and Night Clubs - W/BWL*	\$179,757,343	\$178,885,756	0.5%	33%	\$59,919,114	\$59,628,585	0.5%
306 General Merchandise	\$122,471,368	\$117,202,225	4.5%	5%	\$6,123,568	\$5,860,111	4.5%
407 Automobile, Bus and Truck Rentals**	\$46,937,354	\$46,290,642	1.4%	90%	\$42,243,619	\$41,661,578	1.4%
706 Airlines - Commercial	\$276,394	\$203,010	36.1%	50%	\$138,197	\$101,505	36.1%
901 Hotels, Motels, Apartments, Cottages	\$65,916,332	\$65,284,665	1.0%	100%	\$65,916,332	\$65,284,665	1.0%
925 Recreation and Amusement Places	\$4,467,552	\$4,276,791	4.5%	50%	\$2,233,776	\$2,138,395	4.5%
Tourism Tax Categories Subtotal	\$694,639,071	\$679,167,306	2.3%	-	\$287,537,787	\$284,200,962	1.2%
All Sales Tax Categories Subtotal	\$3,090,858,755	\$3,043,687,198	1.5%				