

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through April decreased 5 percent compared to last fiscal year, according to Google Analytics. More than 479,600 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 15,150 requests for travel kits have been received via the web site. The year's online advertising budget to date is 53 percent greater than last year, but overall advertising expenditures were down 15 percent.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Website unique visitors*	1,309,683	1,376,636	(4.9%)
Web advertising clicks	479,672	366,799	30.8%
Web travel kit requests	15,149	19,076	(20.6%)
Online advertising budget	\$384,778	\$251,785	52.8%

Newsletters

Consumer – More than 123,450 prospective visitors received the e-newsletter in April 2014. The number of subscribers grew almost 40 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 April – 6 percent fewer than last year.

Social Media

The number of *TravelMD* Facebook fans has grown nearly 53 percent this year compared to last year. OTD Twitter followers have grown 60 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 856 visitors to click to *VisitMaryland.org* and 683 Twitter followers were driven to the site in April. Facebook sent an additional 215 clicks to the online calendar and Twitter sent 388 users to this page.

	FY 2014 YTD	FY 2013 YTD	Change
Facebook fans	36,052	23,641	52.5%
Twitter followers	39,047	24,476	59.5%

* 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 April, 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 14 percent lower than the previous year; there was a 30 percent decline in advertising requests. Broadcast requests also declined 12 percent with a budget that was 58 percent lower. The top five lead-generating publications in April were: *America's Best Vacation*, *Southern Living*, *Great Vacation Getaways*, *Oprah*, and *Better Homes and Gardens*.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Print advertising requests	22,448	32,278	(30.4)
Print advertising budget	\$229,407	\$268,002	(14.4%)
Broadcast leads	4,341	4,937	(12.1%)
Broadcast advertising budget	\$169,454	\$405,546	(58.2%)

Communications Efforts

This year through April 2014, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$ 5.9 million in advertising value for Maryland tourism products and services, a 48 percent decline from nearly \$ 11.3 million the previous year.

Welcome Centers

Close to 18,660 travelers visited OTD-operated Maryland Welcome Centers in April, a 37 percent decrease from the previous year. During this fiscal year, Welcome Centers have received close to 221,500 visitors, compared to 260,220 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 2,003 sessions this fiscal year, 12 percent less than last year's 2,285.

Amtrak

The Amtrak train system in Maryland recorded 753,200 non-commuter arrivals this fiscal year through April – 0.4 percent more travelers than last year at this time.

BWI Airport

BWI served over 914,700 domestic passenger arrivals and over 40,830 international arrivals in April 2014. During fiscal year 2014, total arrivals have increased 0.7 percent compared to last year; while international arrivals have seen a 22 percent increase.

Leisure and Hospitality Employment

Employment in Maryland’s Leisure and Hospitality sector grew 2.2 percent compared to last April. At the national level, employment through April in these three industries saw an overall increase of 3.0 percent.

	FY 2014 YTD	FY 2013 YTD	Change
Arts, Entertainment, Recreation	389,000	377,400	3.1%
Accommodation	239,500	233,300	2.7%
Food Services	1,868,100	1,832,400	1.9%
Total	2,496,600	2,443,100	2.2%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in April 2014 increased 6.2 percent, while room revenue saw an increase of 5.4 percent. At the national level, the number of rooms sold increased by 4.0 percent and room revenue grew 8.2 percent.

Gaming Revenue (in millions)

This fiscal year through April 2014, gaming facilities generated over \$ 685.3 million in revenue, an increase of 45 percent compared to last year. In the month of April alone, the combined revenue totaled nearly \$ 71 million, an increase of 20 percent from last April’s revenue of \$59 million.

Gaming Facility	FY 2014 YTD	FY 2013 YTD	Change
Perryville, VLT	\$ 59.5	\$ 62.5	(4.8%)
Perryville, Table	\$ 11.2	\$ 3.0	270.5%
Maryland Live, VLT	\$ 343.9	\$ 357.8	(3.9%)
Maryland Live, Table	\$ 194.4	\$ 8.4	2213.7%
Ocean Downs, VLT	\$ 42.4	\$ 40.8	5.4%
Rocky Gap, VLT	\$ 28.8		
Rocky Gap, Table	\$ 4.9		
Combined Total	\$ 685.3	\$472.6	45.0%

Source: Maryland Lottery

Tourism Taxes

Sales and use tax data for the first ten 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 1.5 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*	\$274,787,666	\$264,937,432	3.7%	33%	\$91,595,889	\$88,312,477	3.7%
111 Hotels, Motels Selling Food - W/BWL*	\$32,640,659	\$34,381,177	(5.1%)	100%	\$32,640,659	\$34,381,177	(5.1%)
112 Restaurants and Night Clubs - W/BWL*	\$202,236,335	\$201,445,681	0.4%	33%	\$67,412,112	\$67,148,560	0.4%
306 General Merchandise	\$135,120,852	\$129,299,255	4.5%	5%	\$6,756,043	\$6,464,963	4.5%
407 Automobile, Bus and Truck Rentals**	\$52,317,034	\$51,007,548	2.6%	90%	\$47,085,331	\$45,906,793	2.6%
706 Airlines - Commercial	\$307,377	\$231,929	32.5%	50%	\$153,688	\$115,964	32.5%
901 Hotels, Motels, Apartments, Cottages	\$74,070,678	\$72,667,989	1.9%	100%	\$74,070,678	\$72,667,989	1.9%
925 Recreation and Amusement Places	\$4,909,594	\$4,696,102	4.5%	50%	\$2,454,797	\$2,348,051	4.5%
Tourism Tax Categories Subtotal	\$776,390,193	\$758,667,111	2.3%	-	\$322,169,195	\$317,345,974	1.5%
All Sales Tax Categories Subtotal	\$3,443,855,777	\$3,391,294,900	1.5%				