

# Maryland Tourism Monitor

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

## Web Marketing

This year's web site visitation through May decreased 1 percent compared to last fiscal year, according to Google Analytics. More than visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 19,370 requests for travel kits have been received via the web site. The year's online advertising budget to date is 17 percent greater than last year, but overall advertising expenditures were down 10 percent.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Website unique visitors*	1,537,384	1,558,331	(1.3%)
Web advertising clicks	479,672	463,168	3.6%
Web travel kit requests	19,365	23,107	(16.2%)
Online advertising budget	\$421,927	\$359,901	17.2%

## Newsletters

Consumer – More than 123,960 prospective visitors received the e-newsletter in May 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 8,520 subscribers in May – 6 percent fewer than last year.

## Social Media

The number of *TravelMD* Facebook fans has grown nearly 24 percent this year compared to last year. OTD Twitter followers have grown 45 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 820 visitors to click to *VisitMaryland.org* and 694 Twitter followers were driven to the site in May. Facebook sent an additional 284 clicks to the online calendar and Twitter sent 436 users to this page.

	FY 2014 YTD	FY 2013 YTD	Change
Facebook fans	19,759	15,970	23.7%
Twitter followers	22,942	15,769	45.4%

\* The performance measure includes the following web sites: [www.visitmaryland.org](http://www.visitmaryland.org), [www.SS200.com](http://www.SS200.com), [www.SS200.org](http://www.SS200.org), and [www.visitmd.mobi](http://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 May, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and television ads also ran in August 2013 and May 2014. To date, OTD's print advertising budget was 11 percent lower than the previous year; there was a 24 percent decline in advertising requests. Broadcast requests also declined 13 percent with a budget that was 21 percent lower. The top five lead-generating publications in May were: *Great Vacation Getaways*, *Oprah*, *Family Circle*, *AAA Horizons* and *Better Homes and Gardens*.

Request Type	FY 2014 YTD	FY 2013 YTD	Change
Print advertising requests	31,364	41,463	(24.3)
Print advertising budget	\$343,036	\$383,962	(10.7%)
Broadcast leads	4,845	5,541	(12.6%)
Broadcast advertising budget	\$620,844	\$789,025	(21.3%)

## Communications Efforts

This year through May 2014, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$ 5.5 million in advertising value for Maryland tourism products and services, a 58 percent decline from nearly \$ 13.2 million the previous year.

## Welcome Centers

Close to 37,230 travelers visited OTD-operated Maryland Welcome Centers in May, a 3 percent decrease from the previous year. During this fiscal year, Welcome Centers have received close to 263,280 visitors, compared to 298,890 last year. Starting May 1 2014, Welcome Centers including; two on either side of I-70, two on I-95 south of Baltimore and the Mason Dixon Center in Emmitsburg, operated eight hours a day, five days a week.

Kiosks at the I-70 Welcome Centers have recorded 2,315 sessions this fiscal year, 15 percent less than last year's 2,711.

## Amtrak

The Amtrak train system in Maryland recorded 835,200 non-commuter arrivals this fiscal year through May – 0.3 percent less travelers than last year at this time.

## BWI Airport

BWI served over 982,800 domestic passenger arrivals and over 39,900 international arrivals in May 2014. During fiscal year 2014, total arrivals have increased 0.1 percent compared to last year; while international arrivals have seen a 19 percent increase.

## Leisure and Hospitality Employment

Employment in Maryland’s Leisure and Hospitality sector grew 3 percent compared to last year. At the national level, employment though May in these three industries saw an overall increase of 3.0 percent.

	FY 2014 YTD	FY 2013 YTD	Change
Arts, Entertainment, Recreation	450,200	430,300	4.6%
Accommodation	268,300	263,700	1.7%
Food Services	2,083,000	2,029,600	2.6%
<b>Total</b>	<b>2,801,500</b>	<b>2,723,600</b>	<b>2.9%</b>

## Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in May 2014 increased 7 percent, while room revenue saw an increase of 11 percent. At the national level, the number of rooms sold increased by 6 percent and room revenue grew 11 percent.

## Gaming Revenue (in millions)

This fiscal year through May 2014, gaming facilities generated over \$ 691 million in revenue, an increase of 10 percent compared to last year. In the month of May alone, the combined revenue totaled nearly \$ 76 million, an increase of 10 percent from last May’s revenue of \$69 million.

Gaming Facility	FY 2014 YTD	FY 2013 YTD	Change
Perryville, VLT	\$69.8	\$64.9	(6.9%)
Perryville, Table	\$16.0	\$13.3	(16.5%)
Maryland Live, VLT	\$374.9	\$389.6	3.9%
Maryland Live, Table	\$175.6	\$205.5	17.0%
Ocean Downs, VLT	\$47.7	\$47.2	(1.1%)
Rocky Gap, VLT	\$6.5	\$32.8	406.3%
Rocky Gap, Table	\$1.3	\$4.9	282.0%
<b>Combined Total</b>	<b>\$691.8</b>	<b>\$758.3</b>	<b>9.6%</b>

Source: Maryland Lottery

## Tourism Taxes

Sales and use tax data for the first eleven months of Fiscal Year 2014 is now available. Tourism-related tax codes increased 3.0 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 2.3 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*	\$305,651,463	\$293,411,985	4.2%	33%	\$101,883,821	\$97,803,995	4.2%
111 Hotels, Motels Selling Food - W/BWL*	\$36,748,849	\$38,299,260	(4.0%)	100%	\$36,748,849	\$38,299,260	(4.0%)
112 Restaurants and Night Clubs - W/BWL*	\$225,791,614	\$223,835,205	0.9%	33%	\$75,263,871	\$74,611,735	0.9%
306 General Merchandise	\$148,920,500	\$141,362,178	5.3%	5%	\$7,446,025	\$7,068,109	5.3%
407 Automobile, Bus and Truck Rentals**	\$58,323,903	\$56,375,421	3.5%	90%	\$52,491,512	\$50,737,878	3.5%
706 Airlines - Commercial	\$337,271	\$256,086	31.7%	50%	\$168,635	\$128,043	31.7%
901 Hotels, Motels, Apartments, Cottages	\$83,534,017	\$81,000,285	3.1%	100%	\$83,534,017	\$81,000,285	3.1%
925 Recreation and Amusement Places	\$5,457,285	\$5,159,270	5.8%	50%	\$2,728,643	\$2,579,635	5.8%
<b>Tourism Tax Categories Subtotal</b>	<b>\$864,764,902</b>	<b>\$839,699,690</b>	<b>3.0%</b>	<b>-</b>	<b>\$360,265,374</b>	<b>\$352,228,941</b>	<b>2.3%</b>
<b>All Sales Tax Categories Subtotal</b>	<b>\$3,811,190,726</b>	<b>\$3,739,685,192</b>	<b>1.9%</b>				