

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through June increased 2 percent compared to last fiscal year, according to Google Analytics. More than 790,250 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 22,245 requests for travel kits have been received via the web site. The year's online advertising budget to date is 26 percent greater than last year, while overall advertising expenditures – online, print, outdoor and broadcast – were only up 3 percent.

Request Type	FY 2014	FY 2013	Change
Website unique visitors*	1,808,708	1,778,974	1.7%
Web advertising clicks	790,252	611,631	29.2%
Web travel kit requests	22,242	28,649	(22.4%)
Online advertising budget	\$719,438	\$569,861	26.2%

Newsletters

Consumer – More than 123,900 prospective visitors received the e-newsletter in June 2014. The number of subscribers declined 2 percent from last year.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,660 subscribers in June – 4 percent fewer than last year.

Social Media

The number of *TravelMD* Facebook fans has grown nearly 26 percent this year compared to last year. OTD Twitter followers have grown 41 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 2,629 visitors to click to *VisitMaryland.org* and 751 Twitter followers were driven to the site in June. Facebook sent an additional 218 clicks to the online calendar and Twitter sent 302 users to this page.

	FY 2014	FY 2013	Change
Facebook fans	20,667	16,456	25.6%
Twitter followers	23,128	16,366	41.3%

* 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, outdoor, radio and TV advertising. This fiscal year, OTD continued the annual "*Maryland Minute*" radio sponsorship and television ads ran in August 2013 and April, May and June 2014. OTD's print advertising budget was 2 percent lower than the previous year; there was a 20 percent decline in advertising requests. OTD returned to outdoor advertising with its D.C. Station Domination campaign in June that drove viewers to the Star-Spangled 200.com website. Broadcast requests declined 13 percent with a budget that was 16 percent lower. The top five lead-generating publications in June were: *Oprah*, *Great Vacation Getaways*, *Better Homes and Gardens*, *Southern Living* and *Family Circle*.

Request Type	FY 2014	FY 2013	Change
Print advertising requests	38,735	48,385	(19.9)
Print ad budget	\$400,065	\$409,478	(2.3%)
Outdoor ad budget	\$131,000	\$0	--
Broadcast leads	5,303	6,075	(12.7%)
Broadcast ad budget	\$1,086,166	\$1,294,940	(16.1%)

Communications Efforts

This year, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$ 9.6 million in advertising value for Maryland tourism products and services, a 44 percent decline from nearly \$ 13.8 million the previous year. This directly correlates to \$4 million placement about *Sailabration* that ran in July 2012.

Welcome Centers

Close to 32,200 travelers visited OTD-operated Maryland Welcome Centers in June, a 6 percent decline from the previous year. During this fiscal year, Welcome Centers have received close to 295,485 visitors, compared to 333,000 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, began to operate eight hours a day, five days a week.

Kiosks at the I-70 Welcome Centers have recorded 2,665 sessions this fiscal year, 17 percent less than last year.

Amtrak

The Amtrak train system in Maryland recorded 914,400 non-commuter arrivals this fiscal year— 1.2 percent fewer travelers than last year at this time.

BWI Airport

BWI served more than 991,200 domestic passenger arrivals and more than 37,250 international arrivals in June 2014. During fiscal year 2014, total arrivals increased 0.8 percent compared to last year; while international arrivals saw a 16 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 June in these three industries saw an overall increase of 3.2 percent.

	FY 2014	FY 2013	Change
Arts, Entertainment, Recreation	500,600	480,100	4.3%
Accommodation	296,100	290,100	2.1%
Food Services	2,290,000	2,228,000	2.8%
Total	3,086,700	2,998,200	3.0%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in June 2014 increased 5 percent, while room revenue increased 7 percent. At the national level, the number of rooms sold increased by 4 percent and room revenue grew 8 percent.

Gaming Revenue (in millions)

This fiscal year, gaming facilities generated more than \$833 million in revenue, an increase of 37 percent compared to last year. In the month of June alone, the combined revenue totaled nearly \$ 72 million, an increase of 9 percent from last June.

Gaming Facility	FY 2014 (in millions)	FY 2013 (in millions)	Change
Perryville, VLT	\$72.1	\$76.0	(5.1%)
Perryville, Table	\$13.6	\$6.0	127.7%
Maryland Live, VLT	\$419.0	\$431.1	(2.8%)
Maryland Live, Table	\$235.4	\$41.6	465.6%
Ocean Downs, VLT	\$52.0	\$50.4	3.2%
Rocky Gap, VLT	\$35.3	\$2.8	1160.7%
Rocky Gap, Table	\$5.9	\$0.5	1080.8%
Combined Total	\$833.3	\$608.3	37.0%

Source: Maryland Lottery

Tourism Sales Tax Revenues

The Bureau of Revenue Estimates reported actual tourism expenditures of \$401.3 million for FY 2014, an increase of 2.4 percent over FY 2013. Seven of eight performance measures saw increases in FY 2014, with only Hotels, Motels Selling Food (with beer, wine and liquor license) declining 3.1 percent. This decline correlates to the government shutdown in October 2013. Adjusted tourism revenue grew 2.4 percent, outperforming overall sales tax growth by 14 percent.

Sales Tax Category	TOTAL SALES TAX REVENUES (\$ in Millions)			Factor	ADJUSTED TOURISM TAXES (\$ in Millions)		
	FY2013 Actual	FY2014 Actual	Growth		FY2013 Adjusted	FY2014 Adjusted	Growth
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL	\$323.7	\$337.2	4.2%	33%	\$107.9	\$112.4	4.2%
111 Hotels, Motels Selling Food - W/BWL	\$42.8	\$41.5	(3.1%)	100%	\$42.8	\$41.5	(3.1%)
112 Restaurants and Night Clubs - W/BWL	\$247.0	\$249.8	1.1%	33%	\$82.3	\$83.3	1.1%
306 General Merchandise	\$156.6	\$165.2	5.5%	5%	\$7.8	\$8.3	5.5%
407 Automobile, Bus and Truck Rentals	\$62.4	\$64.6	3.5%	90%	\$56.2	\$58.1	3.5%
706 Airlines - Commercial	\$0.3	\$0.4	28.4%	50%	\$0.1	\$0.2	28.4%
901 Hotels, Motels, Apartments, Cottages	\$91.8	\$94.4	2.9%	100%	\$91.8	\$94.4	2.9%
925 Recreation and Amusement Places	\$6.1	\$6.4	5.2%	50%	\$3.1	\$3.2	5.2%
Tourism Tax Categories Subtotal	\$930.7	\$959.5	3.1%	-	\$392.0	\$401.3	2.4%
All Sales Tax Categories Subtotal	\$4,120.0	\$4,207.0	2.1%				