

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through October increased 130 percent compared to last year, according to Google Analytics. More than 449,690 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 8,600 requests for travel kits have been received via the web site. The year's online advertising budget to date is 25 percent greater than last year's, while overall advertising expenditures – online, print and broadcast – increased 24 percent.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Website unique visitors*	1,409,884	613,627	129.8%
Web advertising clicks	449,697	195,468	130.1%
Web travel kit requests	8,614	6,581	30.9%
Online advertising budget	\$202,743	\$161,499	25.5%

Newsletters

Consumer – Nearly 132,500 prospective visitors received the e-newsletter in October 2014. The number of subscribers increased 5 percent from last year.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,130 subscribers in October– 3 percent fewer than last year.

Social Media

The number of *TravelMD* Facebook fans has grown 22 percent this fiscal year compared to last. OTD Twitter followers have grown 47 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 1,231 visitors to click to *VisitMaryland.org* and 639 Twitter followers were driven to the site in October. Facebook sent an additional 550 clicks to the online calendar and Twitter sent 263 users to this page.

	FY 2015 YTD	FY 2014 YTD	Change
Facebook fans	22,933	18,798	22.0%
Twitter followers	26,131	17,728	47.4%

* The performance measure includes the following web sites: www.visitmaryland.org, www.visitmd.mobi, www.SS200.com, www.SS200.org, www.keycam.com, www.1821battles.com, www.1812battles.mobi

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. This fiscal year through October, OTD is continuing the annual “*Maryland Minute*” radio sponsorship and television ads also ran in August, September and October. To date, OTD spent 47 percent less on print advertising than last year and there was a 4 percent decline in advertising requests. Broadcast requests also decreased 9.6 percent with a budget that was 44 percent higher – understandable as most TV spots drove viewers to the Star-Spangled website. The top five lead-generating publications in October were: *AAA Horizon*, *Southern Living*, *Better Homes and Gardens*, *Preservation*, and *Civil War Traveler*.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Print advertising requests	9,984	10,447	(4.4%)
Print ad budget	\$56,392	\$106,805	(47.2%)
Broadcast leads	1,909	2,111	(9.6%)
Broadcast ad budget	\$516,273	\$359,623	43.6%

Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated more than \$6.2 million in advertising value for Maryland tourism products and services, a 109 percent increase from \$3 million the previous fiscal year.

Welcome Centers

Starting May 1, 2014, OTD-operated Maryland 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. In October, close to 30,550 travelers visited these welcome centers, a 1 percent increase from the previous year. During this fiscal year, welcome centers have received more than 129,530 visitors, a decrease of 5.1 percent from last year.

Kiosks at the I-70 Welcome Centers have recorded nearly 1,690 sessions this fiscal year, 6 percent more than last year.

Amtrak

The Amtrak train system in Maryland recorded 318,800 non-commuter arrivals this fiscal year— 2.3 percent more travelers than last year at this time.

BWI Airport

BWI served nearly 924,170 domestic passenger arrivals and more than 30,700 international arrivals in October 2014. This fiscal year, total arrivals have increased 1 percent compared to last year with international arrivals seeing a 7 percent decrease.

Leisure and Hospitality Employment

Employment in Maryland’s Leisure and Hospitality sector grew 4.7 percent compared to last year. At the national level October employment in these three industries saw an overall increase of 4 percent.

	October 2014	October 2013	Change
Arts, Entertainment, Recreation	41,500	37,500	10.7%
Accommodation	25,700	23,900	7.5%
Food Services	191,100	185,300	3.1%
Total	258,300	246,700	4.7%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in October 2014 increased 9.8 percent, while room revenue increased 12 percent. At the national level, the number of rooms sold increased by 6.3 percent and room revenue grew 11.2 percent.

Gaming Revenue (in millions)

This year fiscal year through October, gaming facilities generated more than \$326 million in revenue, an increase of 20 percent compared to last year’s \$272 million.

Gaming Facility	FY 2015 YTD (In millions)	FY 2014 YTD (In millions)	Change
Hollywood, VLT	\$22.8	\$24.2	(5.8%)
Hollywood, Table	\$4.1	\$4.5	(8.9%)
Ocean Downs, VLT	\$21.2	\$21.1	0.5%
Maryland Live, VLT	\$134.0	\$136.2	(1.6%)
Maryland Live, Table	\$77.4	\$72.0	7.5%
Rocky Gap, VLT	\$13.8	\$12.1	14.0%
Rocky Gap, Table	\$2.0	\$1.9	5.3%
Horseshoe, VLT	\$30.3		
Horseshoe, Table	\$20.3		
Combined Total	\$326.0	\$272.0	19.8%

Source: Maryland Lottery

Tourism Sales Tax Revenues

Sales and use tax data for the first four months of Fiscal Year 2015 is now available. Tourism-related tax codes increased 7.3 percent while overall sales tax collections over the same time period grew 4 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller – increased 6.7 percent, outperforming overall sales tax collections.

Sales Tax Category	TOTAL SALES TAX REVENUES (\$)			Factor	TOURISM TAX REVENUES (\$)		
	FY 2015 YTD	FY 2014 YTD	% Change		FY 2015 YTD	FY 2014 YTD	% Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	\$120,130,069	\$112,839,483	6.5%	33%	\$40,043,356	\$37,613,161	6.5%
111 Hotels, Motels Selling Food - W/BWL*	\$17,554,918	\$16,372,792	7.2%	100%	\$17,554,918	\$16,372,792	7.2%
112 Restaurants and Night Clubs - W/BWL*	\$90,126,484	\$84,934,994	6.1%	33%	\$30,042,161	\$28,311,665	6.1%
306 General Merchandise	\$56,230,088	\$50,493,876	11.4%	5%	\$2,811,504	\$2,524,694	11.4%
407 Automobile, Bus and Truck Rentals**	\$24,380,108	\$22,441,470	8.6%	90%	\$21,942,097	\$20,197,323	8.6%
706 Airlines - Commercial	\$189,629	\$128,999	47.0%	50%	\$94,814	\$64,499	47.0%
901 Hotels, Motels, Apartments, Cottages	\$39,803,018	\$37,970,195	4.8%	100%	\$39,803,018	\$37,970,195	4.8%
925 Recreation and Amusement Places	\$3,072,648	\$2,259,596	36.0%	50%	\$1,536,324	\$1,129,798	36.0%
Tourism Tax Categories Subtotal	\$351,486,961	\$327,441,406	7.3%	-	\$153,828,193	\$144,184,128	6.7%
All Sales Tax Categories Subtotal	\$1,450,469,625	\$1,393,389,591	4.1%				