

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through August increased 115 percent compared to last year, according to Google Analytics. More than 300,600 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 4,000 requests for travel kits have been received via the web site. The year's online advertising budget to date is 167 percent greater than last year's, while overall advertising expenditures – online, print and broadcast – increased 146 percent.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Website unique visitors*	603,602	281,343	114.5%
Web advertising clicks	300,684	64,244	368%
Web travel kit requests	3,969	4,153	(4.4%)
Online advertising budget	\$111,003	\$41,602	166.8%

Newsletters

Consumer – More than 133,000 prospective visitors received the e-newsletter in August 2014. The number of subscribers increased 4 percent from last year.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,790 subscribers in August – 2 percent more than last year.

Social Media

The number of *TravelMD* Facebook fans has grown 26 percent this fiscal year compared to last. 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 838 visitors to click to *VisitMaryland.org* and 695 Twitter followers were driven to the site in August. Facebook sent an additional 238 clicks to the online calendar and Twitter sent 343 users to this page.

	FY 2015 YTD	FY 2014 YTD	Change
Facebook fans	21,521	17,052	26.2%
Twitter followers	24,615	17,492	40.7%

* 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 August, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and television ads also ran. To date OTD spent the same amount on print advertising as last year and there was an 8 percent decline in advertising requests. Broadcast requests also decreased 22 percent with a budget that was 190 percent higher – understandable as most TV spots drove viewers to the Star-Spangled website. The top five lead-generating publications in August were: *Southern Living*, *Oprah*, *Better Homes and Gardens*, *Civil War Traveler*, and *Family Circle*.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Print advertising requests	6,271	6,828	(8.2%)
Print ad budget	\$34,209	\$34,209	0.0%
Broadcast leads	1,142	1,470	(22.3%)
Broadcast ad budget	\$268,643	\$92,629	190.0%

Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated more than \$2.4 million in advertising value for Maryland tourism products and services, a 37 percent increase from \$1.7 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 August, close to 34,700 travelers visited these welcome centers, an 8 percent decline from the previous year. During this fiscal year, welcome centers have received more than 67,800 visitors, a decrease of 10 percent from last year.

Kiosks at the I-70 Welcome Centers have recorded nearly 1,000 sessions this fiscal year, 2 percent fewer than last year.

Amtrak

The Amtrak train system in Maryland recorded 156,500 non-commuter arrivals this fiscal year— close to 3 percent more travelers than last year at this time.

BWI Airport

BWI served more than 1 million domestic passenger arrivals and more than 40,000 international arrivals in August 2014. This fiscal year, total arrivals have increased 0.2 percent compared to last year; while international arrivals saw an 8 percent decrease.

Leisure and Hospitality Employment

Employment in Maryland’s Leisure and Hospitality sector grew 3 percent compared to last year. At the national level, employment through August in these three industries saw an overall increase of 2.4 percent.

	August 2014	August 2013	Change
Arts, Entertainment, Recreation	49,500	50,100	(1.2%)
Accommodation	28,600	27,300	4.8%
Food Services	204,600	196,200	4.3%
Total	282,700	273,600	3.3%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in August 2014 increased 7 percent, while room revenue increased 9.6 percent. At the national level, the number of rooms sold increased by nearly 4.8 percent and room revenue grew 10.4 percent.

Gaming Revenue (in millions)

This year fiscal year through August, gaming facilities generated more than \$156.7 million in revenue, an increase of 11.7 percent compared to last year’s \$140 million.

Gaming Facility	FY 2015 YTD (In millions)	FY 2014 YTD (In millions)	Change
Hollywood, VLT	\$12.7	\$12.7	0%
Hollywood, Table	\$2.2	\$2.5	(12%)
Ocean Downs, VLT	\$12.0	\$11.8	1.7%
Maryland Live, VLT	\$74.7	\$70.5	6.0%
Maryland Live, Table	\$40.9	\$35.3	15.9%
Rocky Gap, VLT	\$7.3	\$6.5	12.3%
Rocky Gap, Table	\$1.1	\$.94	17.0%
Horseshoe, VLT	\$4.4		
Horseshoe, Table	\$1.4		
Combined Total	\$156.7	\$140.2	11.7%

Source: Maryland Lottery

Tourism Sales Tax Revenues

Sales and use tax data for the second month of Fiscal Year 2015 is now available. Tourism-related tax codes increased 7.4 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 6.5 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*	61,022,413	57,142,188	6.8%	33%	20,340,804	19,047,396	6.8%
111 Hotels, Motels Selling Food - W/BWL*	9,232,508	8,742,390	5.6%	100%	9,232,508	8,742,390	5.6%
112 Restaurants and Night Clubs - W/BWL*	48,037,947	44,865,977	7.1%	33%	16,012,649	14,955,326	7.1%
306 General Merchandise	27,435,828	24,511,611	11.9%	5%	1,371,791	1,225,581	11.9%
407 Automobile, Bus and Truck Rentals**	12,892,160	12,055,717	6.9%	90%	11,602,944	10,850,145	6.9%
706 Airlines - Commercial	102,428	74,677	37.2%	50%	51,214	37,338	37.2%
901 Hotels, Motels, Apartments, Cottages	22,363,253	21,240,338	5.3%	100%	22,363,253	21,240,338	5.3%
925 Recreation and Amusement Places	1,429,944	1,282,975	11.5%	50%	714,972	641,487	11.5%
Tourism Tax Categories Subtotal	182,516,480	169,915,873	7.4%	-	81,690,135	76,740,001	6.5%
All Sales Tax Categories Subtotal	724,122,929	696,199,224	4.0%				