

# Maryland Tourism Monitor

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

## Web Marketing

This year's web site visitation through September increased 181 percent compared to last year, according to Google Analytics. More than 393,580 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 6,690 requests for travel kits have been received via the web site. The year's online advertising budget to date is 114 percent greater than last year's, while overall advertising expenditures – online, print and broadcast – increased 26 percent.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Website unique visitors*	1,205,016	429,582	180.5%
Web advertising clicks	393,588	118,421	232.4%
Web travel kit requests	6,688	5,457	22.6%
Online advertising budget	\$166,684	\$78,001	113.7%

## Newsletters

Consumer – More than 132,600 prospective visitors received the e-newsletter in September 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 8,840 subscribers in September – 5 percent more than last year.

## Social Media

The number of *TravelMD* Facebook fans has grown 28 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 821 visitors to click to *VisitMaryland.org* and 450 Twitter followers were driven to the site in September. Facebook sent an additional 374 clicks to the online calendar and Twitter sent 275 users to this page.

	FY 2015 YTD	FY 2014 YTD	Change
Facebook fans	22,297	17,380	28.3%
Twitter followers	25,294	17,963	40.8%

\* The performance measure includes the following web sites: [www.visitmaryland.org](http://www.visitmaryland.org), [www.visitmd.mobi](http://www.visitmd.mobi), [www.SS200.com](http://www.SS200.com), [www.SS200.org](http://www.SS200.org), [www.keycam.com](http://www.keycam.com), [www.1821battles.com](http://www.1821battles.com), [www.1812battles.mobi](http://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 September, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and television ads also ran. To date OTD spent 65 percent less on print advertising than last year and there was a 9 percent decline in advertising requests. Broadcast requests also decreased 14 percent with a budget that was 34 percent higher – understandable as most TV spots drove viewers to the Star-Spangled website. The top five lead-generating publications in September were: *Southern Living*, *AAA World, Better Homes and Gardens*, *Civil War Traveler*, and *AAA Car and Travel (NY)*.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Print advertising requests	8,084	8,920	(9.4%)
Print ad budget	\$37,242	\$106,544	(65%)
Broadcast leads	1,544	1,802	(14.3%)
Broadcast ad budget	\$472,648	\$352,490	34.1%

## Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated more than \$5.8 million in advertising value for Maryland tourism products and services, a 98 percent increase from \$2.9 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 September, close to 31,150 travelers visited these welcome centers, a 0.3 percent increase from the previous year. During this fiscal year, welcome centers have received more than 98,980 visitors, a decrease of 6.8 percent from last year.

Kiosks at the I-70 Welcome Centers have recorded nearly 1,435 sessions this fiscal year, 16 percent more than last year.

## Amtrak

The Amtrak train system in Maryland recorded 234,800 non-commuter arrivals this fiscal year— close to 3 percent more travelers than last year at this time.

## BWI Airport

BWI served nearly 875,400 domestic passenger arrivals and more than 33,900 international arrivals in September 2014. This fiscal year, total arrivals have increased 1 percent compared to last year with international arrivals seeing a 6 percent decrease.

## Leisure and Hospitality Employment

Employment in Maryland’s Leisure and Hospitality sector grew 1.5 percent compared to last year. At the national level September employment in these three industries saw an overall increase of 2.6 percent.

	September 2014	September 2013	Change
Arts, Entertainment, Recreation	43,600	44,100	(1.1%)
Accommodation	26,900	25,800	4.3%
Food Services	194,600	191,400	1.7%
<b>Total</b>	<b>265,100</b>	<b>261,300</b>	<b>1.5%</b>

## Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in September 2014 increased 5.9 percent, while room revenue increased 9.5 percent. At the national level, the number of rooms sold increased by nearly 4.9 percent and room revenue grew 10.5 percent.

## Gaming Revenue (in millions)

This year fiscal year through September, gaming facilities generated more than \$239 million in revenue, an increase of 16 percent compared to last year’s \$206 million.

Gaming Facility	FY 2015 YTD (In millions)	FY 2014 YTD (In millions)	Change
Hollywood, VLT	\$17.7	\$18.3	(3.3%)
Hollywood, Table	\$3.1	\$3.5	(11.4%)
Ocean Downs, VLT	\$17.0	\$17.0	0.0%
Maryland Live, VLT	\$102.5	\$103.0	(0.5%)
Maryland Live, Table	\$58.6	\$53.4	9.7%
Rocky Gap, VLT	\$10.5	\$9.2	14.1%
Rocky Gap, Table	\$1.5	\$1.4	7.1%
Horseshoe, VLT	\$18.0		
Horseshoe, Table	\$10.4		
<b>Combined Total</b>	<b>\$239.3</b>	<b>\$205.6</b>	<b>16.4%</b>

Source: Maryland Lottery

## Tourism Sales Tax Revenues

Sales and use tax data for the third 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 6.7 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*	90,872,557	85,505,460	6.3%	33%	30,290,852	28,501,820	6.3%
111 Hotels, Motels Selling Food - W/BWL*	13,639,374	12,719,452	7.2%	100%	13,639,374	12,719,452	7.2%
112 Restaurants and Night Clubs - W/BWL*	70,121,193	65,745,838	6.7%	33%	23,373,731	21,915,279	6.7%
306 General Merchandise	42,692,882	38,320,401	11.4%	5%	2,134,644	1,916,020	11.4%
407 Automobile, Bus and Truck Rentals**	18,611,107	17,189,094	8.3%	90%	16,749,996	15,470,185	8.3%
706 Airlines - Commercial	133,733	98,406	35.9%	50%	66,867	49,203	35.9%
901 Hotels, Motels, Apartments, Cottages	31,622,663	30,054,641	5.2%	100%	31,622,663	30,054,641	5.2%
925 Recreation and Amusement Places	2,370,976	1,847,068	28.4%	50%	1,185,488	923,534	28.4%
<b>Tourism Tax Categories Subtotal</b>	<b>270,064,485</b>	<b>251,480,360</b>	<b>7.4%</b>	-	<b>119,063,615</b>	<b>111,550,133</b>	<b>6.7%</b>
All Sales Tax Categories Subtotal	1,097,172,378	1,055,294,086	4.0%				