

Maryland Tourism Monitor

Recap of Maryland's travel & tourism trends, monitored by the Office of Tourism Development (Data through March 2015)

Web Marketing

This year's web site visitation through March increased 79 percent compared to last year, according to Google Analytics. More than 571,680 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 17,230 requests for travel kits have been received via the web site. The year's online advertising budget to date is 23 percent greater than last year's, while overall advertising expenditures – online, print and broadcast – increased 12 percent.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Website unique visitors*	2,088,670	1,167,517	78.9%
Web advertising clicks	571,685	420,804	35.9%
Web travel kit requests	17,225	12,912	33.4%
Online advertising budget	\$277,509	\$225,864	22.9%

Newsletters

Consumer – Nearly 140,545 prospective visitors received the e-newsletter in March. The number of subscribers increased 14 percent from last year.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 7,750 subscribers in March – 7 percent less than last year.

Social Media

The number of *TravelMD* Facebook fans has grown 27 percent this fiscal year compared to last. OTD Twitter followers have grown 36 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 427 visitors to click to *VisitMaryland.org* and 600 Twitter followers were driven to the site in March. Facebook sent an additional 246 clicks to the online calendar and Twitter sent 351 users to this page.

	FY 2015 YTD	FY 2014 YTD	Change
Facebook fans	24,390	19,198	27.0%
Twitter followers	28,924	21,354	35.5%

* 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 March, OTD is continuing the annual “*Maryland Minute*” radio sponsorship and television ads also ran in August, September and October. To date, OTD spent 49 percent less on print advertising than last year and there was an 8 percent decline in advertising requests. Broadcast requests increased 14 percent with a budget that was 40 percent higher. The top five lead-generating publications in March were: *Southern Living*, *Better Homes and Gardens*, *AAA World*, *Civil War Traveler*, and *AAA NY Car and Travel*.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Print advertising requests	16,429	17,938	(8.4%)
Print ad budget	\$110,412	\$217,666	(49.3%)
Broadcast leads	3,909	3,426	14.1%
Broadcast ad budget	\$556,839	\$398,412	39.8%

Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated close to \$8.1 million in advertising value for Maryland tourism products and services, a 65 percent increase from \$4.9 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. 21,195 travelers visited these welcome centers in March, a 17 percent increase from the previous year. During this fiscal year, welcome centers have received close to 220,030 visitors, an increase of 8 percent from last year.

Kiosks at the I-70 Welcome Centers have recorded close to 2,100 sessions this fiscal year, 10 percent more than last year.

Amtrak

The Amtrak train system in Maryland recorded 686,700 non-commuter arrivals this fiscal year, an increase of 1.1 percent more travelers than last year.

BWI Airport

BWI served more than 903,560 domestic passenger arrivals and close to 45,910 international arrivals in March 2015. This fiscal year, total arrivals have increased 0.9 percent compared to last with international arrivals seeing a 4.4 percent increase.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 2 percent in March compared to last year.

At the national level, employment in these three industries also saw an overall increase of 3.6 percent.

	March 2015	March 2014	Change
Arts, Entertainment, Recreation	\$43,700	\$36,000	21.4%
Accommodation	\$20,700	\$22,800	(9.2%)
Food Services	\$185,500	\$186,200	(0.4%)
Total	\$249,900	\$245,000	2.0%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in March 2015 increased 5.7 percent, while room revenue increased 7.7 percent. This fiscal year, the number of rooms sold increased by 5.2 percent and room revenue grew 6.5 percent.

Gaming Revenue (in millions)

This year fiscal year through March, gaming facilities generated more than \$760 million in revenue, an increase of 24 percent compared to last year's \$614 million.

Gaming Facility	FY 2015 YTD (In millions)	FY 2014 YTD (In millions)	Change
Hollywood, VLT	\$48.8	\$53.1	(8.1%)
Hollywood, Table	\$8.8	\$10.0	(11.5%)
Ocean Downs, VLT	\$38.6	\$38.8	(0.7%)
Maryland Live, VLT	\$290.2	\$307.7	(5.7%)
Maryland Live, Table	\$173.5	\$174.2	(0.4%)
Rocky Gap, VLT	\$28.0	\$25.7	9.0%
Rocky Gap, Table	\$4.7	\$4.4	7.2%
Horseshoe, VLT	\$95.0	-	-
Horseshoe, Table	\$72.7	-	-
Combined Total	\$760.4	\$614.0	23.9%

Source: Maryland Lottery

Tourism Sales Tax Revenues

Sales and use tax data for the first nine months of Fiscal Year 2015 is now available. Tourism-related tax codes increased 11.3 percent while overall sales tax collections over the same time period grew 5.5 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller – increased 7.3 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	\$263,510,909	\$245,774,321	7.2%	33%	\$87,836,970	\$81,924,774	7.2%
111 Hotels, Motels Selling Food - W/BWL	\$30,205,867	\$29,038,408	4.0%	100%	\$30,205,867	\$29,038,408	4.0%
112 Restaurants and Night Clubs - W/BWL	\$189,775,408	\$179,757,343	5.6%	33%	\$63,258,469	\$59,919,114	5.6%
306 General Merchandise	\$162,298,195	\$122,471,368	32.5%	5%	\$8,114,910	\$6,123,568	32.5%
407 Automobile, Bus and Truck Rentals	\$49,802,714	\$46,937,355	6.1%	90%	\$44,822,442	\$42,243,619	6.1%
706 Airlines - Commercial	\$377,948	\$276,395	36.7%	50%	\$188,974	\$138,197	36.7%
901 Hotels, Motels, Apartments, Cottages	\$70,958,269	\$65,916,332	7.6%	100%	\$70,958,269	\$65,916,332	7.6%
925 Recreation and Amusement Places	\$6,333,978	\$4,467,552	41.8%	50%	\$3,166,989	\$2,233,776	41.8%
Tourism Tax Categories Subtotal	\$773,263,288	\$694,639,072	11.3%	-	\$308,552,890	\$287,537,788	7.3%
All Sales Tax Categories Subtotal	\$3,262,355,232	\$3,090,858,754	5.5%				