

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through April increased 71 percent compared to last year, according to Google Analytics. More than 610,820 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 19,045 requests for travel kits have been received via the web site. The year's online advertising budget to date is 13 percent greater than last year's, while overall advertising expenditures – online, print and broadcast – increased 8 percent.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Website unique visitors*	2,235,632	1,309,662	70.7%
Web advertising clicks	610,823	479,672	27.3%
Web travel kit requests	19,041	15,149	25.7%
Online advertising budget	\$293,464	\$259,116	13.3%

Newsletters

Consumer – Nearly 139,500 prospective visitors received the e-newsletter in April. The number of subscribers increased 13 percent from last year.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 7,785 subscribers in April – 8 percent less 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 33 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 600 visitors to click to *VisitMaryland.org* and 444 Twitter followers were driven to the site in April. Facebook sent an additional 272 clicks to the online calendar and Twitter sent 185 users to this page.

	FY 2015 YTD	FY 2014 YTD	Change
Facebook fans	24,860	19,440	27.9%
Twitter followers	29,893	22,410	33.4%

* 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 April, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and television ads also ran in August, September and October. To date, OTD spent 45 percent less on print advertising than last year and there was a 3 percent decline in advertising requests. Broadcast requests increased 13 percent with a budget that was 40 percent higher. The top five lead-generating publications in April were: *Oprah*, *Better Homes and Gardens*, *Southern Living*, *Great Vacation Getaways* and *AAA World*.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Print advertising requests	21,833	22,506	(2.9%)
Print ad budget	\$146,621	\$268,001	(45.3%)
Broadcast leads	4,387	3,877	13.2%
Broadcast ad budget	\$567,326	\$405,546	39.9%

Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated close to \$8.6 million in advertising value for Maryland tourism products and services, a 75 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. During April, 29,778 travelers visited these welcome centers, a 60 percent increase from the previous year. During this fiscal year, welcome centers have received close to 249,800 visitors, an increase of 13 percent from last year.

Kiosks at the I-70 Welcome Centers have recorded close to 2,260 sessions this fiscal year, 9 percent more than last year.

Amtrak

The Amtrak train system in Maryland recorded 762,600 non-commuter arrivals this fiscal year, an increase of 1.2 percent more travelers than last year.

BWI Airport

BWI served more than 968,110 domestic passenger arrivals and close to 51,170 international arrivals in April 2015. This fiscal year, total arrivals have increased 1.5 percent compared to last with international arrivals seeing a 6.7 percent increase.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 3 percent in April compared to last year. At the national level, employment in these three industries also saw an overall increase of 3.6 percent.

	April 2015	April 2014	Change
Arts, Entertainment, Recreation	47,600	40,600	17.2%
Accommodation	22,300	24,100	(7.5%)
Food Services	192,500	190,200	1.2%
Total	262,400	254,900	2.9%

Tourism Sales Tax Revenues

Sales and use tax data for the first ten months of Fiscal Year 2015 is now available. Tourism-related tax codes increased 11.2 percent while overall sales tax collections over the same time period grew 5.3 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller – increased 6.9 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	\$294,656,335	\$274,787,666	7.2%	33%	\$98,218,778	\$91,595,889	7.2%
111 Hotels, Motels Selling Food - W/BWL	\$33,863,257	\$32,640,659	3.7%	100%	\$33,863,257	\$32,640,659	3.7%
112 Restaurants and Night Clubs - W/BWL	\$212,217,587	\$202,236,335	4.9%	33%	\$70,739,196	\$67,412,112	4.9%
306 General Merchandise	\$180,551,437	\$135,120,852	33.6%	5%	\$9,027,572	\$6,756,043	33.6%
407 Automobile, Bus and Truck Rentals	\$55,354,760	\$52,317,034	5.8%	90%	\$49,819,284	\$47,085,331	5.8%
706 Airlines - Commercial	\$414,552	\$307,377	34.9%	50%	\$207,276	\$153,688	34.9%
901 Hotels, Motels, Apartments, Cottages	\$79,221,917	\$74,070,678	7.0%	100%	\$79,221,917	\$74,070,678	7.0%
925 Recreation and Amusement Places	\$6,908,110	\$4,909,594	40.7%	50%	\$3,454,055	\$2,454,797	40.7%
Tourism Tax Categories Subtotal	\$863,187,955	\$776,390,193	11.2%	-	\$344,551,335	\$322,169,195	6.9%
All Sales Tax Categories Subtotal	\$3,625,751,203	\$3,443,855,777	5.3%				

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in April 2015 increased 4.8 percent, while room revenue increased 7.9 percent. This fiscal year, the number of rooms sold increased by 5.0 percent and room revenue grew 7.2 percent.

Gaming Revenue (in millions)

This year fiscal year through April, gaming facilities generated more than \$849 million in revenue, an increase of 24 percent compared to last year's \$685 million.

Gaming Facility	FY 2015 YTD (In millions)	FY 2014 YTD (In millions)	Change
Hollywood, VLT	\$54.6	\$59.6	(8.4%)
Hollywood, Table	\$10.0	\$11.2	(11.3%)
Ocean Downs, VLT	\$42.9	\$42.5	(0.9%)
Maryland Live, VLT	\$322.0	\$344.0	(6.4%)
Maryland Live, Table	\$192.7	\$194.4	(0.9%)
Rocky Gap, VLT	\$31.3	\$28.8	8.6%
Rocky Gap, Table	\$5.4	\$4.9	9.2%
Horseshoe, VLT	\$107.2	-	-
Horseshoe, Table	\$83.5	-	-
Combined Total	\$849.4	\$685.4	23.9%

Source: Maryland Lottery