

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through December increased 80 percent compared to last year, according to Google Analytics. More than 500,000 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 10,950 requests for travel kits have been received via the web site. The year's online advertising budget to date is 19 percent greater than last year's, while overall advertising expenditures – online, print and broadcast – increased 14 percent.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Website unique visitors*	1,667,923	922,300	80.0%
Web advertising clicks	500,609	313,636	59.6%
Web travel kit requests	10,949	8,190	33.7%
Online advertising budget	\$234,587	\$196,551	19.4%

Newsletters

Consumer – Nearly 142,700 prospective visitors received the e-newsletter in December. 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 8,260 subscribers in December – 7 percent more than last year.

Social Media

The number of *TravelMD* Facebook fans has grown 29 percent this fiscal year compared to last. OTD Twitter followers have grown 38 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 930 visitors to click to *VisitMaryland.org* and 399 Twitter followers were driven to the site in December. Facebook sent an additional 169 clicks to the online calendar and Twitter sent 128 users to this page.

	FY 2015 YTD	FY 2014 YTD	Change
Facebook fans	23,595	18,342	28.6%
Twitter followers	26,562	19,319	37.5%

* 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 November, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and television ads also ran in August, September and October. To date, OTD spent 63 percent less on print advertising than last year and there was a 6 percent decline in advertising requests. Broadcast requests also decreased 3 percent with a budget that was 43 percent higher – understandable as most TV spots drove viewers to the Star-Spangled website. The top five lead-generating publications in December were: *Southern Living*, *AAA Horizons*, *Better Homes and Gardens*, *Maryland Life and Preservation*.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Print advertising requests	11,624	12,421	(6.4%)
Print ad budget	\$58,802	\$158,471	(62.9%)
Broadcast leads	2,551	2,624	(2.8%)
Broadcast ad budget	\$535,866	\$375,672	42.6%

Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated close to \$7.2 million in advertising value for Maryland tourism products and services, a 75 percent increase from \$4.1 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 December, 16,830 travelers visited these welcome centers, a 20 percent increase from the previous year. During this fiscal year, welcome centers have received close to 168,230 visitors, a decrease of 0.7 percent from last year.

Kiosks at the I-70 Welcome Centers have recorded more than 1,850 sessions this fiscal year, 6 percent more than last year.

Amtrak

The Amtrak train system in Maryland recorded 481,800 non-commuter arrivals this fiscal year, an increase of 0.3 percent more travelers than last year at this time.

BWI Airport

BWI served more than 900,000 domestic passenger arrivals and close to 910,700 international arrivals in December 2014. This fiscal year, total arrivals have increased 0.5 percent compared to last year with international arrivals seeing a 4.2 percent decrease.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 4.3 percent in December compared to last year. At the national level, employment in these three industries also saw an overall increase of 3.2 percent.

	December 2014	December 2013	Change
Arts, Entertainment, Recreation	37,200	34,000	9.4%
Accommodation	23,600	22,300	5.8%
Food Services	189,200	183,500	3.1%
Total	250,000	239,800	4.3%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in December 2014 increased 7.8 percent, while room revenue increased 12.8 percent. At the national level, the number of rooms sold increased by 5.8 percent and room revenue grew 10.4 percent.

Gaming Revenue (in millions)

This year fiscal year through December, gaming facilities generated more than \$502 million in revenue, an increase of 24 percent compared to last year's \$404 million.

Gaming Facility	FY 2015 YTD (In millions)	FY 2014 YTD (In millions)	Change
Hollywood, VLT	\$33.2	\$35.1	(5.4%)
Hollywood, Table	\$5.9	\$6.7	(12.1%)
Ocean Downs, VLT	\$27.8	\$28.0	(0.6%)
Maryland Live, VLT	\$198.1	\$202.8	(2.3%)
Maryland Live, Table	\$117.3	\$111.3	5.4%
Rocky Gap, VLT	\$19.3	\$17.2	12.4%
Rocky Gap, Table	\$3.1	\$2.8	11.6%
Horseshoe, VLT	\$55.0	\$0.0	-
Horseshoe, Table	\$41.9	\$0.0	-
Combined Total	\$501.7	\$403.9	24.2%

Source: Maryland Lottery

Tourism Sales Tax Revenues

Sales and use tax data for the first six months of Fiscal Year 2015 is now available. Tourism-related tax codes increased 10.8 percent while overall sales tax collections over the same time period grew 5.4 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller – increased 7.6 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*	\$179,082,703	\$167,694,368	6.8%	33%	\$59,694,234	\$55,898,123	6.8%
111 Hotels, Motels Selling Food - W/BWL*	\$22,993,498	\$21,504,220	6.9%	100%	\$22,993,498	\$21,504,220	6.9%
112 Restaurants and Night Clubs - W/BWL*	\$130,844,981	\$123,449,270	6.0%	33%	\$43,614,994	\$41,149,757	6.0%
306 General Merchandise	\$110,333,689	\$85,670,627	28.8%	5%	\$5,516,684	\$4,283,531	28.8%
407 Automobile, Bus and Truck Rentals**	\$34,809,858	\$32,284,473	7.8%	90%	\$31,328,873	\$29,056,026	7.8%
706 Airlines - Commercial	\$262,519	\$199,605	31.5%	50%	\$131,260	\$99,803	31.5%
901 Hotels, Motels, Apartments, Cottages	\$52,298,861	\$48,854,027	7.1%	100%	\$52,298,861	\$48,854,027	7.1%
925 Recreation and Amusement Places	\$4,366,926	\$3,146,304	38.8%	50%	\$2,183,463	\$1,573,152	38.8%
Tourism Tax Categories Subtotal	\$534,993,036	\$482,802,895	10.8%	-	\$217,761,867	\$202,418,638	7.6%
All Sales Tax Categories Subtotal	\$2,265,571,000	\$2,149,842,664	5.4%				