

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through January increased 95 percent compared to last year, according to Google Analytics. More than 527,730 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 13,670 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 13 percent.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Website unique visitors*	1,852,455	951,581	94.7%
Web advertising clicks	525,737	341,750	53.8%
Web travel kit requests	13,668	9,878	38.4%
Online advertising budget	\$245,065	\$206,390	18.7%

Newsletters

Consumer – Nearly 142,600 prospective visitors received the e-newsletter in January. 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 7,700 subscribers in January – 6 percent less 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 238 visitors to click to *VisitMaryland.org* and 595 Twitter followers were driven to the site in January. Facebook sent an additional 97 clicks to the online calendar and Twitter sent 321 users to this page.

	FY 2015 YTD	FY 2014 YTD	Change
Facebook fans	24,007	18,649	28.7%
Twitter followers	27,343	19,839	37.8%

* 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 January, OTD is continuing the annual “*Maryland Minute*” radio sponsorship and television ads also ran in August, September and October. To date, OTD spent 62 percent less on print advertising than last year and there was an 8 percent decline in advertising requests. Broadcast requests also decreased 0.6 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 January were: *Southern Living*, *AAA World*, *Civil War Traveler*, *Better Homes and Gardens* and *Preservation*.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Print advertising requests	13,004	14,098	(7.7%)
Print ad budget	\$64,178	\$168,302	(61.8%)
Broadcast leads	3,018	3,035	(0.6%)
Broadcast ad budget	\$546,353	\$382,584	42.8%

Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated close to \$7.3 million in advertising value for Maryland tourism products and services, a 52 percent increase from \$4.8 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 January, 16,672 travelers visited these welcome centers, a 134 percent increase from the previous year. During this fiscal year, welcome centers have received close to 184,900 visitors, an increase of 5 percent from last year.

Kiosks at the I-70 Welcome Centers have recorded more than 1,935 sessions this fiscal year, 7 percent more than last year.

Amtrak

The Amtrak train system in Maryland recorded nearly half a million non-commuter arrivals this fiscal year, an increase of 0.2 percent more travelers than last year.

BWI Airport

BWI served more than 718,000 domestic passenger arrivals and close to 40,500 international arrivals in January 2015. This fiscal year, total arrivals have increased 0.6 percent compared to last fiscal year with international arrivals seeing a 0.2 percent decrease.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 2.1 percent in January compared to last year. At the national level, employment in these three industries also saw an overall increase of 3.3 percent.

	January 2015	January 2014	Change
Arts, Entertainment, Recreation	40,000	35,100	14.0%
Accommodation	20,200	21,500	(6.0%)
Food Services	181,800	180,400	0.8%
Total	242,000	237,000	2.1%

Tourism Sales Tax Revenues

Sales and use tax data for the first seven 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 5.4 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller – increased 7.5 percent, outperforming overall sales tax collections.

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in January 2015 increased 3.5 percent, while room revenue increased 4.4 percent. At the national level, the number of rooms sold increased by 5.2 percent and room revenue grew 9.7 percent.

Gaming Revenue (in millions)

This year fiscal year through January, gaming facilities generated more than \$586 million in revenue, an increase of 25 percent compared to last year's \$470 million.

Gaming Facility	FY 2015 YTD (In millions)	FY 2014 YTD (In millions)	Change
Hollywood, VLT	\$38.3	\$40.4	(5.2%)
Hollywood, Table	\$6.8	\$7.7	(11.7%)
Ocean Downs, VLT	\$31.2	\$31.1	0.3%
Maryland Live, VLT	\$229.4	\$235.6	(2.6%)
Maryland Live, Table	\$135.5	\$132.2	2.5%
Rocky Gap, VLT	\$19.3	\$19.6	(1.5%)
Rocky Gap, Table	\$3.6	\$3.4	5.9%
Horseshoe, VLT	\$67.6	-	-
Horseshoe, Table	\$52.4	-	-
Combined Total	\$586.6	\$470.1	24.8%

Source: Maryland Lottery

TOTAL SALES TAX REVENUES (\$)				Factor	TOURISM TAX REVENUES (\$)		
Sales Tax Category	FY 2015 YTD	FY 2014 YTD	% Change		FY 2015 YTD	FY 2014 YTD	% Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	\$205,964,124	\$192,190,862	7.2%	33%	\$68,654,708	\$64,063,621	7.2%
111 Hotels, Motels Selling Food - W/BWL*	\$25,009,328	\$23,525,162	6.3%	100%	\$25,009,328	\$23,525,162	6.3%
112 Restaurants and Night Clubs - W/BWL*	\$148,941,958	\$140,115,677	6.3%	33%	\$49,647,319	\$46,705,226	6.3%
306 General Merchandise	\$126,511,862	\$96,854,613	30.6%	5%	\$6,325,593	\$4,842,731	30.6%
407 Automobile, Bus and Truck Rentals**	\$39,666,520	\$37,082,373	7.0%	90%	\$35,699,868	\$33,374,136	7.0%
706 Airlines - Commercial	\$298,303	\$226,310	31.8%	50%	\$149,151	\$113,155	31.8%
901 Hotels, Motels, Apartments, Cottages	\$57,498,659	\$53,964,171	6.5%	100%	\$57,498,659	\$53,964,171	6.5%
925 Recreation and Amusement Places	\$5,026,342	\$3,543,183	41.9%	50%	\$2,513,171	\$1,771,592	41.9%
Tourism Tax Categories Subtotal	\$608,917,095	\$547,502,351	11.2%	-	\$245,497,797	\$228,359,792	7.5%
All Sales Tax Categories Subtotal	\$2,574,274,748	\$2,443,000,815	5.4%				