

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through February increased 88 percent compared to last year, according to Google Analytics. More than 540,520 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 15,330 requests for travel kits have been received via the web site. The year's online advertising budget to date is 16 percent greater than last year's, while overall advertising expenditures – online, print and broadcast – increased 18 percent.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Website unique visitors*	1,953,84	1,039,96	87.9%
Web advertising clicks	540,525	369,857	46.1%
Web travel kit requests	15,326	11,189	37.0%
Online advertising budget	\$250,536	\$216,047	16.0%

Newsletters

Consumer – Nearly 140,960 prospective visitors received the e-newsletter in February. 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 February – 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 37 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 322 visitors to click to *VisitMaryland.org* and 396 Twitter followers were driven to the site in February. Facebook sent an additional 120 clicks to the online calendar and Twitter sent 214 users to this page.

	FY 2015 YTD	FY 2014 YTD	Change
Facebook fans	24,332	18,894	28.8%
Twitter followers	28,119	20,517	37.1%

* 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.1821battles.mobi

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. This fiscal year through February, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and television ads also ran in August, September and October. To date, OTD spent 38 percent less on print advertising than last year and there was a 9 percent decline in advertising requests. Broadcast requests also decreased 0.9 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 February were: *Civil War Traveler*, *Southern Living*, *AAA World*, *Better Homes and Gardens* and *Preservation*.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Print advertising requests	14,439	15,608	(9.2%)
Print ad budget	\$105,535	\$168,975	(37.5%)
Broadcast leads	3,442	3,411	(0.9%)
Broadcast ad budget	\$556,839	\$389,496	43.0%

Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated close to \$7.9 million in advertising value for Maryland tourism products and services, a 61 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. In February, 13,932 travelers visited these welcome centers, a 69 percent increase from the previous year. During this fiscal year, welcome centers have received close to 198,840 visitors, an increase of 8 percent from last year.

Kiosks at the I-70 Welcome Centers have recorded close to 2,000 sessions this fiscal year, 8 percent more than last year.

Amtrak

The Amtrak train system in Maryland recorded 608,700 non-commuter arrivals this fiscal year, an increase of 0.7 percent more travelers than last year.

BWI Airport

BWI served more than 662,180 domestic passenger arrivals and close to 36,580 international arrivals in February 2015. This fiscal year, total arrivals have increased 0.8 percent compared to last with international arrivals seeing a 2.7 percent increase.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 1.5 percent in February compared to last year. At the national level, employment in these three industries also saw an overall increase of 3.7 percent.

	February 2015	February 2014	Change
Arts, Entertainment, Recreation	40,000	35,300	13.3%
Accommodation	20,400	21,500	(5.1%)
Food Services	183,500	180,600	1.6%
Total	243,900	240,200	1.5%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in February 2015 increased 6.4 percent, while room revenue increased 4.9 percent. This fiscal year, the number of rooms sold increased by 4.3 percent and room revenue grew 6.7 percent.

Gaming Revenue (in millions)

This year fiscal year through February, gaming facilities generated more than \$669 million in revenue, an increase of 25 percent compared to last year's \$536 million.

Gaming Facility	FY 2015 YTD (In millions)	FY 2014 YTD (In millions)	Change
Hollywood, VLT	\$43.3	\$46.4	(6.6%)
Hollywood, Table	\$7.8	\$8.8	(11.7%)
Ocean Downs, VLT	\$34.5	\$34.7	(0.4%)
Maryland Live, VLT	\$258.4	\$269.6	(4.2%)
Maryland Live, Table	\$153.4	\$150.5	1.9%
Rocky Gap, VLT	\$24.7	\$22.3	10.9%
Rocky Gap, Table	\$4.2	\$3.8	8.9%
Horseshoe, VLT	\$80.7	-	-
Horseshoe, Table	\$62.3	-	-
Combined Total	\$669.4	\$536.1	24.9%

Source: Maryland Lottery

Tourism Sales Tax Revenues

Sales and use tax data for the first eight 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 5.2 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller – increased 7.5 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	\$232,680,637	\$216,584,866	7.4%	33%	\$77,560,212	\$72,194,955	7.4%
111 Hotels, Motels Selling Food - W/BWL	\$27,192,942	\$25,776,489	5.5%	100%	\$27,192,942	\$25,776,489	5.5%
112 Restaurants and Night Clubs - W/BWL	\$167,112,612	\$157,970,275	5.8%	33%	\$55,704,204	\$52,656,758	5.8%
306 General Merchandise	\$142,357,298	\$108,211,068	31.6%	5%	\$7,117,865	\$5,410,553	31.6%
407 Automobile, Bus and Truck Rentals	\$44,177,969	\$41,491,420	6.5%	90%	\$39,760,172	\$37,342,278	6.5%
706 Airlines - Commercial	\$330,465	\$241,674	36.7%	50%	\$165,232	\$120,837	36.7%
901 Hotels, Motels, Apartments, Cottages	\$63,286,875	\$59,156,218	7.0%	100%	\$63,286,875	\$59,156,218	7.0%
925 Recreation and Amusement Places	\$5,663,325	\$3,954,964	43.2%	50%	\$2,831,662	\$1,977,482	43.2%
Tourism Tax Categories Subtotal	\$682,802,124	\$613,386,975	11.3%	-	\$273,619,166	\$254,635,571	7.5%
All Sales Tax Categories Subtotal	\$2,881,632,475	\$2,740,127,148	5.2%				