

# Maryland Tourism Monitor

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

## Web Marketing

This year's web site visitation through November increased 108 percent compared to last year, according to Google Analytics. More than 471,640 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 9,900 requests for travel kits have been received via the web site. The year's online advertising budget to date is 17 percent greater than last year's, while overall advertising expenditures – online, print and broadcast – increased 21 percent.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Website unique visitors*	1,549,821	744,930	108.0%
Web advertising clicks	471,647	245,979	91.7%
Web travel kit requests	9,913	7,367	34.6%
Online advertising budget	\$218,946	186,752	17.2%

## Newsletters

Consumer – Nearly 131,500 prospective visitors received the e-newsletter in November 2014. The number of subscribers increased 3 percent from last year.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,890 subscribers in November – 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 644 visitors to click to *VisitMaryland.org* and 496 Twitter followers were driven to the site in November. Facebook sent an additional 339 clicks to the online calendar and Twitter sent 329 users to this page.

	FY 2015 YTD	FY 2014 YTD	Change
Facebook fans	23,288	18,056	29.0%
Twitter followers	26,032	18,898	37.8%

\* The performance measure includes the following web sites: [www.visitmaryland.org](http://www.visitmaryland.org), [www.visitmd.mobi](http://www.visitmd.mobi), [www.SS200.com](http://www.SS200.com), [www.SS200.org](http://www.SS200.org), [www.keycam.com](http://www.keycam.com), [www.1821battles.com](http://www.1821battles.com), [www.1812battles.mobi](http://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 48 percent less on print advertising than last year and there was a 7 percent decline in advertising requests. Broadcast requests also decreased 9 percent with a budget that was 44 percent higher – understandable as most TV spots drove viewers to the Star-Spangled website. The top five lead-generating publications in November were: *Southern Living*, *Better Homes and Gardens*, *Civil War Traveler*, *Preservation* and *AAA New York Car and Travel*.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Print advertising requests	10,877	11,639	(6.5%)
Print ad budget	\$58,595	\$112,373	(47.9%)
Broadcast leads	2,143	2,363	(9.3%)
Broadcast ad budget	\$527,323	\$366,756	43.8%

## Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated more than \$6.9 million in advertising value for Maryland tourism products and services, a 106 percent increase from \$3.4 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 November, close to 21,865 travelers visited these welcome centers, a 16 percent increase from the previous year. During this fiscal year, welcome centers have received close to 151,400 visitors, a decrease of 2.6 percent from last year.

Kiosks at the I-70 Welcome Centers have recorded more than 1,800 sessions this fiscal year, 7.5 percent more than last year.

## Amtrak

The Amtrak train system in Maryland recorded 401,800 non-commuter arrivals this fiscal year— 1 percent more travelers than last year at this time.

## BWI Airport

BWI served nearly 843,900 domestic passenger arrivals and more than 36,490 international arrivals in November 2014. This fiscal year, total arrivals have increased 1 percent compared to last year with international arrivals seeing a 4.7 percent decrease.

## Leisure and Hospitality Employment

Employment in Maryland’s Leisure and Hospitality sector grew 4.9 percent in November compared to last year. At the national level, employment in these three industries also saw an overall increase of 2.6 percent.

	November 2014	November 2013	Change
Arts, Entertainment, Recreation	38,100	35,000	8.9%
Accommodation	24,300	22,700	7.0%
Food Services	187,900	180,900	3.9%
<b>Total</b>	<b>250,300</b>	<b>238,600</b>	<b>4.9%</b>

## Tourism Sales Tax Revenues

Sales and use tax data for the first five months of Fiscal Year 2015 is now available. Tourism-related tax codes increased 10.4 percent while overall sales tax collections over the same time period grew 7.6 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller –increased 7.8 percent, slightly outperforming overall sales tax collections.

## Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in November 2014 increased 5.7 percent, while room revenue increased 9.4 percent. At the national level, the number of rooms sold increased by 3.4 percent and room revenue grew 8.1 percent.

## Gaming Revenue (in millions)

This year fiscal year through November, gaming facilities generated more than \$416 million in revenue, an increase of 23 percent compared to last year’s \$338.8 million.

Gaming Facility	FY 2015 YTD (In millions)	FY 2014 YTD (In millions)	Change
Hollywood, VLT	\$28.0	\$29.7	(5.7%)
Hollywood, Table	\$5.1	\$5.6	(10.0%)
Ocean Downs, VLT	\$24.4	\$24.6	(0.6%)
Maryland Live, VLT	\$166.5	\$170.5	(2.3%)
Maryland Live, Table	\$98.7	\$91.1	8.3%
Rocky Gap, VLT	\$16.7	\$15.0	11.7%
Rocky Gap, Table	\$2.6	\$2.4	10.7%
Horseshoe, VLT	\$43.2		
Horseshoe, Table	\$30.8		
<b>Combined Total</b>	<b>\$416.0</b>	<b>\$338.8</b>	<b>22.8%</b>

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*	\$148,956,691	\$137,959,581	8.0%	33%	\$49,652,230	\$45,986,527	8.0%
111 Hotels, Motels Selling Food - W/BWL*	\$20,603,923	\$19,304,801	6.7%	100%	\$20,603,923	\$19,304,801	6.7%
112 Restaurants and Night Clubs - W/BWL*	\$109,676,357	\$103,209,353	6.3%	33%	\$36,558,786	\$34,403,118	6.3%
306 General Merchandise	\$76,173,027	\$60,044,941	26.9%	5%	\$3,808,651	\$3,002,247	26.9%
407 Automobile, Bus and Truck Rentals**	\$29,247,151	\$27,050,655	8.1%	90%	\$26,322,436	\$24,345,590	8.1%
706 Airlines - Commercial	\$227,344	\$146,531	55.2%	50%	\$113,672	\$73,266	55.2%
901 Hotels, Motels, Apartments, Cottages	\$46,639,294	\$43,738,166	6.6%	100%	\$46,639,294	\$43,738,166	6.6%
925 Recreation and Amusement Places	\$3,709,089	\$2,622,646	41.4%	50%	\$1,854,545	\$1,311,323	41.4%
<b>Tourism Tax Categories Subtotal</b>	<b>\$435,232,877</b>	<b>\$394,076,674</b>	<b>10.4%</b>	-	<b>\$185,553,537</b>	<b>\$172,165,037</b>	<b>7.8%</b>
All Sales Tax Categories Subtotal	\$1,820,061,181	\$1,692,263,415	7.6%				