

Maryland Tourism Monitor

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

Web Marketing

This year's web site visitation through June increased 45 percent compared to last year, according to Google Analytics. More than 1,051,800 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 21,600 requests for travel kits have been received via the web site. The year's online advertising budget to date is 19 percent less than last year's, while overall advertising expenditures – online, print and broadcast – decreased 18 percent.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Website unique visitors*	2,622,498	1,810,817	44.8%
Web advertising clicks	1,051,810	790,252	33.1%
Web travel kit requests	21,670	22,242	(2.6%)
Online advertising budget	461,152	572,255	(19.5%)

Newsletters

Consumer – Nearly 137,830 prospective visitors received the e-newsletter in June. The number of subscribers increased 11 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 June – 11 percent less than last year.

Social Media

The number of *TravelMD* Facebook fans has grown 24 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 1,556 visitors to click to *VisitMaryland.org* and 713 Twitter followers were driven to the site in June.

	FY 2015 YTD	FY 2014 YTD	Change
Facebook fans	25,541	20,662	23.6%
Twitter followers	30,821	23,128	33.2%

* 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 June, OTD is continuing the annual "*Maryland Minute*" radio sponsorship and television ads also ran in August, September and October. To date, OTD spent 35 percent less on print advertising than last year and there was a 6 percent decrease in advertising requests. Broadcast requests increased 1 percent with a budget that was 12 percent lower. The top five lead-generating publications in June were: *Family Circle*, *Great Vacation Getaways*, *Oprah*, *Better Homes and Gardens* and *Southern Living*.

Request Type	FY 2015 YTD	FY 2014 YTD	Change
Print advertising requests	36,481	38,793	(5.9%)
Print ad budget	264,636	409,478	(35.4%)
Broadcast leads	4,877	4,839	0.8%
Broadcast ad budget	\$1,138,823	\$1,294,940	(12.1%)

Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated close to \$9.5 million in advertising value for Maryland tourism products and services, a 1 percent decrease from \$6.1 million the previous fiscal year.

Welcome Centers

Starting June 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 June, 37,900 travelers visited these welcome centers. During this fiscal year, welcome centers have received close to 287,700 visitors, an increase of 21 percent from last year.

Kiosks at the I-70 Welcome Centers have recorded close to 2,625 sessions this fiscal year, 5 percent less than last year. Part of this decline can be attributed to problems with the kiosk's touch screens.

Amtrak

The Amtrak train system in Maryland recorded 906,000 non-commuter arrivals this fiscal year, nearly 1 percent less travelers than last year.

BWI Airport

BWI served more than 1,023,840 domestic passenger arrivals and close to 56,650 international arrivals in June 2015. This fiscal year, total arrivals have increased 2 percent compared to last with international arrivals seeing a 12 percent increase.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 3 percent in June compared to last year. At the national level, employment in these three industries also saw an overall increase of 3.3 percent.

	June 2015	June 2014	Change
Arts, Entertainment, Recreation	58,100	50,400	15.3%
Accommodation	25,900	27,800	(6.8%)
Food Services	210,800	207,000	1.8%
Total	294,800	285,200	3.4%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in June 2015 increased 1.2 percent, while room revenue increased 4.4 percent. This fiscal year, the number of rooms sold increased by 3.3 percent and room revenue grew 5.7 percent.

Gaming Revenue (in millions)

This year fiscal year through June, gaming facilities generated more than 1 billion dollars in revenue, an increase of 25 percent from last year's \$833 million.

Gaming Facility	FY 2015 YTD (In millions)	FY 2014 YTD (In millions)	Change
Hollywood, VLT	\$66.1	\$72.1	(8.2%)
Hollywood, Table	\$11.9	\$13.6	(12.0%)
Ocean Downs, VLT	\$53.1	\$52.0	2.2%
Maryland Live, VLT	\$391.8	\$419.0	(6.5%)
Maryland Live, Table	\$233.8	\$235.4	(0.7%)
Rocky Gap, VLT	\$38.0	\$35.3	7.5%
Rocky Gap, Table	\$6.6	\$5.9	12.0%
Horseshoe, VLT	\$131.7	\$0.0	
Horseshoe, Table	\$104.0	\$0.0	
Combined Total	\$1,037.2	\$833.3	24.5%

Source: Maryland Lottery

Tourism Sales Tax Revenues

Sales and use tax figures for the complete 2015 Fiscal Year are now available. Tourism-related tax codes increased 10.7 percent while overall sales tax collections over the same time period grew 4.9 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller – increased 6.1 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	\$360,202,612	\$337,203,331	6.8%	33%	\$120,067,537	\$112,401,110	6.8%
111 Hotels, Motels Selling Food - W/BWL	\$42,189,903	\$41,484,586	1.7%	100%	\$42,189,903	\$41,484,586	1.7%
112 Restaurants and Night Clubs - W/BWL	\$261,540,255	\$249,811,837	4.7%	33%	\$87,180,085	\$83,270,612	4.7%
306 General Merchandise	\$221,347,376	\$165,179,844	34.0%	5%	\$11,067,369	\$8,258,992	34.0%
407 Automobile, Bus and Truck Rentals	\$67,171,249	\$64,601,874	4.0%	90%	\$60,454,124	\$58,141,687	4.0%
706 Airlines - Commercial	\$478,441	\$366,942	30.4%	50%	\$239,221	\$183,471	30.4%
901 Hotels, Motels, Apartments, Cottages	\$100,431,618	\$94,373,554	6.4%	100%	\$100,431,618	\$94,373,554	6.4%
925 Recreation and Amusement Places	\$8,605,180	\$6,439,195	33.6%	50%	\$4,302,590	\$3,219,598	33.6%
Tourism Tax Categories Subtotal	\$1,061,966,635	\$959,461,162	10.7%		\$425,932,447	\$401,333,609	6.1%
All Sales Tax Categories Subtotal	\$4,414,484,394	\$4,206,621,352	4.9%				