

Maryland Tourism Monitor

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

Web Marketing

Web site visitation in Fiscal Year 2016 has decreased 43 percent compared to last year, according to Google Analytics. Increases in visitation for last July directly correlate to the Star Spangled Spectacular event held in Baltimore. In July, 2015 more than 117,600 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 1,400 requests for travel kits have been received via the web site. The online advertising budget for this month is 29 percent lower than last year, while overall advertising expenditures – online, print and broadcast – increased 99 percent.

Request Type	July 2015	July 2014	Change
Website unique visitors*	172,382	301,533	(42.8%)
Web advertising clicks	117,617	154,486	(23.9%)
Web travel kit requests	1,404	1,363	3.0%
Online advertising budget	\$48,543	\$68,801	(29.4%)

Newsletters

Consumer – More than 137,800 prospective visitors received the e-newsletter in July. The number of subscribers increased 3.3 percent from last year. Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 7,720 subscribers in July – 11.4 percent less than last year.

Social Media

The number of *TravelMD* Facebook fans has grown nearly 23 percent this year compared to July, 2014. OTD Twitter followers have grown 32 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed more than 2,550 visitors to click to *VisitMaryland.org* and 635 Twitter followers were driven to the site.

	July 2015	July 2014	Change
Facebook fans	25,960	21,132	22.8%
Twitter followers	31,443	23,780	32.2%

* 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.1812battles.mobi, www.fishandhuntmaryland.com.

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. In Fiscal Year 2016, OTD is continuing the annual "Maryland Minute" radio sponsorship and television ads also ran in July, 2015. To date, OTD has spent 46 percent less on print advertising than last year and there was a 9 percent decrease in advertising requests. Broadcast requests also decreased despite the increase in dollars allocated to broadcast. The top five lead-generating publications this month were: *Oprah*, *Southern Living*, *Better Homes and Gardens*, *AAA World* and *Family Circle*.

Request Type	July 2015	July 2014	Change
Print advertising requests	3,042	3,359	(9.4%)
Print ad budget	\$20,604	\$34,209	(39.8%)
Broadcast leads	343	636	(46.1%)
Broadcast ad budget	\$152,506	\$8,458	1,703%

Communications Efforts

In July, 2015 communications activities such as press outreach, familiarization tours and visiting journalists generated close to \$95,000 in advertising value for Maryland tourism products and services, a 91 percent decline from close to \$1 million the previous year.

Welcome Centers

OTD-operates 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. During July, 2015 nearly 34,400 travelers visited these welcome centers, an increase of 4 percent from last year.

Kiosks at the I-70 Welcome Centers recorded 177 sessions this month, 64 percent less than last July. Part of this decline can be attributed to problems with the kiosk's touch screens, which have now been corrected.

Amtrak

The Amtrak train system in Maryland recorded 74,400 non-commuter arrivals in Fiscal Year 2016—close to 5 percent less travelers than last year at this time.

BWI Airport

BWI served more than 1 million domestic passenger arrivals and more than 71,740 international arrivals in July, 2015. Total arrivals and international arrivals increased 9 and 57 percent respectively compared to last year.

Leisure and Hospitality Employment

In July, 2015 employment in Maryland's Leisure and Hospitality sector grew 6 percent compared to last year. At the national level, employment during the same month in these three industries saw an overall increase of 3 percent.

	July 2015	July 2014	Change
Arts, Entertainment, Recreation	60,900	53,200	14.5%
Accommodation	26,400	25,500	3.5%
Food Services	209,500	201,400	4.0%
Total	296,800	280,100	6.0%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in July, 2015 increased 2 percent, while room revenue increased 6 percent. At the national level, the number of rooms sold increased by nearly 4 percent and room revenue grew 10 percent.

Gaming Revenue (in millions)

In July, 2015 gaming facilities generated close to \$99 million in revenue, an increase of 30 percent compared to last year's \$76 million.

Gaming Facility	July 2015 (in millions)	July 2014 (in millions)	Change
Perryville, VLT	\$5.9	\$6.4	(7.1%)
Perryville, Table	\$1.0	\$1.1	(14.2%)
Maryland Live, VLT	\$36.7	\$36.7	(0.1%)
Maryland Live, Table	\$20.2	\$21.5	(5.8%)
Ocean Downs, VLT	\$6.4	\$6.1	4.8%
Rocky Gap, VLT	\$3.7	\$3.7	1.1%
Rocky Gap, Table	\$0.6	\$0.5	26.0%
Horseshoe VLT	\$13.6	-	-
Horseshoe Table	\$10.8	-	-
Combined Total	\$99.0	\$76.0	30.2%

Source: Maryland Lottery

Tourism Sales Tax Revenues

Sales and use tax data for the first month of Fiscal Year 2016 is now available. Tourism-related tax codes increased 12.4 percent while overall sales tax collections over the same time period grew 4.8 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller (\$42,862,649) – increased 4.2 percent.

TOTAL SALES TAX REVENUES (\$)				TOURISM TAX REVENUES (\$)			
Sales Tax Category	July 2015	July 2014	% Change	Factor	July 2015	July 2014	% Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	\$33,535,804	\$30,170,603	11.2%	33%	\$11,178,601	\$10,056,868	11.2%
111 Hotels, Motels Selling Food - W/BWL*	\$4,427,662	\$4,611,707	(4.0%)	100%	\$4,427,662	\$4,611,707	(4.0%)
112 Restaurants and Night Clubs - W/BWL*	\$23,307,161	\$23,504,101	(0.8%)	33%	\$7,769,053	\$7,834,700	(0.8%)
306 General Merchandise	\$20,952,205	\$13,236,952	58.3%	5%	\$1,047,610	\$661,848	58.3%
407 Automobile, Bus and Truck Rentals**	\$6,319,056	\$6,603,321	(4.3%)	90%	\$5,687,150	\$5,942,989	(4.3%)
706 Airlines - Commercial	\$34,326	\$40,123	(14.4%)	50%	\$17,163	\$20,062	(14.4%)
901 Hotels, Motels, Apartments, Cottages	\$12,280,054	\$11,706,199	4.90%	100%	\$12,280,054	\$11,706,199	4.9%
925 Recreation and Amusement Places	\$910,707	\$631,547	44.2%	50%	\$455,354	\$315,773	44.2%
Tourism Tax Categories Subtotal	\$101,766,975	\$90,504,553	12.44%	-	\$42,862,649	\$41,150,145	4.2%
All Sales Tax Categories Subtotal	\$379,822,559	\$362,589,274	4.8%				