

# Maryland Tourism Monitor

Recap of Maryland's travel & tourism trends, monitored by the Office of Tourism Development (Data for FY2016 through October 31)

## Web Marketing

Web site visitation in Fiscal Year 2016 has decreased a little over 50% percent compared to last year, according to Google Analytics. Increases in visitation for FY15 directly correlate to the Star Spangled Spectacular event held in Baltimore. Over 3,500 requests for travel kits have been received via the website. The online advertising budget for FY2016 through October 2015 is just over 20 percent lower than last year, while overall advertising expenditures – online, print and broadcast – also decreased approximately 17 percent.

Request Type	FY 2016 YTD	FY 2015 YTD	Change
Website unique visitors*	689,197	1,410,139	(51.1%)
Web advertising clicks	494,286	449,697	9.9%
Web travel kit requests	3,766	8,614	(56.3%)
Online advertising budget	\$161,826	\$202,743	(20.2%)

## Newsletters

Consumer – 135,591 prospective visitors received the e-newsletter in October 2016. The number of subscribers increased 2.3 percent from last year.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to 7,830 subscribers in October 2016 – 8.7 percent less than last year.

## Social Media

The number of *TravelMD* Facebook fans has grown 18 percent this year compared to FY2015. OTD Twitter followers have grown almost 30 percent

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed almost 35,300 visitors to click to *VisitMaryland.org* and 2,212 Twitter followers were driven to the site.

	FY2016 YTD	FY2015 YTD	Change
Facebook fans	27,068	22,933	18.0%
Twitter followers	32,960	24,415	29.7%

## Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. To date, OTD has spent 15 percent less on print advertising than last year and there was a 3.8 percent decrease in advertising requests. Broadcast requests also decreased with the decrease in dollars allocated to broadcast advertising. The top lead generating publications through FY16 remain the AAA/Rand related publications.

Request Type	FY2016 YTD	FY2015 YTD	Change
Print advertising requests	9,484	9,862	(3.8%)
Print ad budget	\$47,908	\$56,392	(15.0%)
Broadcast leads	1,104	1,909	(42.2%)
Broadcast ad budget	\$431,387	\$516,273	(16.4%)

## Communications Efforts

Thus far in FY2016, communications activities such as press outreach, familiarization tours and visiting journalists generated \$761,477 in advertising value for Maryland tourism products and services. Although this is a decrease year over year, it is difficult to compare to FY15 due to the Star Spangled events.

## Welcome Centers

Various Welcome Centers across the state continue to hold their ground in regards to attracting a near static number of visitors thus far through FY16 when compared to FY15. There have been 129,004 visitors to the welcome centers through the end of October versus 129,536 the previous year. This is less than a 0.5 percent change.

\* 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), [www.fishandhuntmaryland.com](http://www.fishandhuntmaryland.com).

## Amtrak

The Amtrak train system in Maryland recorded 303,200 non-commuter arrivals in Fiscal Year 2016— close to 5.0 percent less travelers than last year at this time.

## BWI Airport

BWI served more than 4 million domestic passenger arrivals and more than 208,000 international arrivals in FY2016 through October 31. Total arrivals and international arrivals increased 6.7 and 37.1 percent respectively compared to last year.

## Leisure and Hospitality Employment

In October, 2015 employment in Maryland’s Leisure and Hospitality sector increased nearly 4.2 percent compared to last year. At the national level, employment during the same month in these three industries saw an overall increase of 3.7 percent.

	August 2015	August 2014	Change
Arts, Entertainment, Recreation	47,900	41,500	15.4%
Accommodation	23,000	25,700	(10.5%)
Food Services	198,200	191,100	3.7%
<b>Total</b>	<b>269,100</b>	<b>258,300</b>	<b>4.1%</b>

## Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in October, 2015 increased 5.1 percent, while room revenue increased 8.7 percent. At the national level, the number of rooms sold increased by 2.9 percent and room revenue grew 7.9 percent.

## Gaming Revenue (in millions)

FY2016 has yielded close to \$378 million in revenue, an increase of 16 percent compared to last year’s \$325.9 million through October 31.

Gaming Facility	FY2016 YTD (in millions)	FY2015 TYD (in millions)	Change
Perryville, VLT	\$21.9	\$22.8	(3.7%)
Perryville, Table	\$3.9	\$4.1	(4.4%)
Maryland Live, VLT	\$138.3	\$134.0	3.2%
Maryland Live, Table	\$75.3	\$77.4	(2.6%)
Ocean Downs, VLT	\$22.8	\$21.1	8.2%
Rocky Gap, VLT	\$14.6	\$13.8	5.6%
Rocky Gap, Table	\$2.2	\$2.0	9.1%
Horseshoe VLT	\$53.6	\$30.3	76.8%
Horseshoe Table	\$45.2	\$20.3	122.6%
<b>Combined Total</b>	<b>\$378.0</b>	<b>\$325.9</b>	<b>16%</b>

Source: Maryland Lottery

## Tourism Sales Tax Revenues

Tourism-related tax codes increased 15.8 4 percent while overall sales tax collections over the same time period grew 5.1 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller grew just shy of \$15mm year over year.

Sales Tax Category	TOTAL SALES TAX REVENUES (\$)			Factor	TOURISM TAX REVENUES (\$)		
	FY2016 YTD	FY 2015 YTD	% Change		FY2016 YTD	FY 2015 YTD	% Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	\$132,674,719	\$120,130,069	10.4%	33%	\$44,224,906	\$40,043,356	10.4%
111 Hotels, Motels Selling Food - W/BWL*	\$17,326,572	\$17,554,918	(1.3%)	100%	\$17,326,612	\$17,554,918	(1.3%)
112 Restaurants and Night Clubs - W/BWL*	\$95,894,896	\$90,126,484	6.4%	33%	\$31,964,965	\$30,042,161	6.4%
306 General Merchandise	\$84,750,874	\$56,230,088	50.7%	5%	\$4,237,543	\$2,811,504	50.7%
407 Automobile, Bus and Truck Rentals**	\$26,150,592	\$24,380,108	7.3%	90%	\$22,364,232	\$21,942,097	7.3%
706 Airlines - Commercial	\$216,843	\$189,629	14.4%	50%	\$108,421	\$94,814	14.4%
901 Hotels, Motels, Apartments, Cottages	\$46,344,830	\$39,803,018	16.4%	100%	\$46,344,830	\$39,803,018	16.4%
925 Recreation and Amusement Places	\$3,632,615	\$3,072,648	18.2%	50%	\$1,816,307	\$1,536,324	18.2%
<b>Tourism Tax Categories Subtotal</b>	<b>\$406,991,944</b>	<b>\$351,486,961</b>	<b>15.8%</b>	<b>-</b>	<b>\$168,387,820</b>	<b>\$153,828,193</b>	<b>15.8%</b>
All Sales Tax Categories Subtotal	\$1,523,735,432	\$1,450,469,625	5.1%				

