

# Maryland Tourism Monitor

Recap of Maryland's travel & tourism trends, monitored by the Office of Tourism Development (Data for FY2016 through Nov. 30)

## Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. To date, OTD has spent 18.7 percent less on print advertising than last year and there was a 2.3 percent decrease in advertising requests.

Broadcast requests also decreased with the decrease in dollars allocated to broadcast advertising. The top lead generating publications through November are: *AAA World, Rand, & Southern Living*.

Request Type	FY2016 YTD	FY2015 YTD	Change
Print advertising requests	10,507	10,755	(2.3%)
Print ad budget	\$48,403	\$59,529	(18.7%)
Broadcast leads	1,255	2,143	(70.8%)
Broadcast ad budget	\$444,147	\$527,323	(15.8%)

## Website Visitation

Over 4,000 requests for travel kits have been received via the website. Website visitation due to advertising has increased 12 percent while the online advertising budget for FY2016 through November 2015 is just under 20 percent lower than last year; overall advertising expenditures – online, print and broadcast – also decreased approximately 16 percent. Total traffic has decreased approximately 49% year over year. This trend has been identified as a result of OTD's prior website counting traffic between both the calendar of events and main site; additionally, there has been no traffic to sites associated with the Star-Spangled Celebration.

Request Type	FY 2016 YTD	FY 2015 YTD	Change
Website unique visitors*	795,702	1,549,821	(48.7%)
Web advertising clicks	527,678	471,647	11.9%
Online advertising budget	\$176,537	\$218,946	(19.4%)
Web travel kit requests	4,193	9,913	(57.7%)

## Communications Efforts

Thus far in FY2016, communications activities such as press outreach, familiarization tours and visiting journalists generated \$1,296,265 in advertising value for Maryland tourism, film, & the fine arts products and services. Although this is a decrease year over year, it is difficult to compare to FY15 due to the Star Spangled events.

## Social Media

The number of *TravelMD* Facebook fans has grown 17.7 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 over 6,000 visitors to click to *VisitMaryland.org* and about 2,000 Twitter followers were driven to the site.

	FY2016 YTD	FY2015 YTD	Change
Facebook fans	27,424	23,288	17.7%
Twitter followers	33,419	26,032	28.4%

## Newsletters

Consumer – 135,212 prospective visitors received the e-newsletter in November 2016. The number of subscribers increased 2.8 percent from last year.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to 7,949 subscribers in November 2016 – 10.6 percent less than last year.

## Welcome Centers

Various Welcome Centers across the state continue to attract a near static number of visitors thus far through FY16 when compared to FY15. There have been 152,255 visitors to the welcome centers through the end of November versus 151,398 the previous year. This is about a 0.5 percent change. The Sideling Hill and Youghiogheny centers are now reflected in this FY16 number.

\* 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 384,700 non-commuter arrivals in Fiscal Year 2016. This represents a 4.3 percent decrease year over year.

## BWI Airport

BWI served more than 5 million domestic passenger arrivals and more than 250,000 international arrivals in FY2016 through November 30. Total arrivals and international arrivals increased 8.2 and 33.1 percent respectively compared to last year.

## Leisure and Hospitality Employment

In November, 2015 employment in Maryland's Leisure and Hospitality sector increased nearly 3.8 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.

	Nov 2015	Nov 2014	Change
Arts, Entertainment, Recreation	44,000	38,100	15.6%
Accommodation	21,800	24,300	(10.3%)
Food Services	193,700	187,900	3.1%
<b>Total</b>	<b>259,500</b>	<b>250,300</b>	<b>3.8%</b>

## Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in November, 2015 increased 2.6 percent, while room revenue increased 5.8 percent. At the national level, the number of rooms sold increased by 2.5 percent and room revenue grew 2.8 percent.

## Gaming Revenue (in millions)

FY2016 has yielded over \$467 million in revenue, an increase of 12.4 percent compared to last year's \$416 million through November 30.

Gaming Facility	FY2016 YTD (in millions)	FY2015 TYD (in millions)	Change
Perryville, VLT	\$27.0	\$28.0	(3.7%)
Perryville, Table	\$5.0	\$5.1	(1.7%)
Maryland Live, VLT	\$172.5	\$166.5	3.6%
Maryland Live, Table	\$92.8	\$98.7	(6.0%)
Ocean Downs, VLT	\$26.7	\$24.4	9.2%
Rocky Gap, VLT	\$17.7	\$16.7	5.5%
Rocky Gap, Table	\$2.7	\$2.6	3.9%
Horseshoe VLT	\$66.9	\$43.2	54.7%
Horseshoe Table	\$56.1	\$30.8	83.7%
<b>Combined Total</b>	<b>\$467.7</b>	<b>\$416.0</b>	<b>12.4%</b>

Source: Maryland Lottery

## Tourism Sales Tax Revenues

Tourism-related tax codes increased 14.7 percent while overall sales tax collections over the same time period grew 4 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller grew nearly \$20 million 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*	\$164,980,272	\$148,956,691	10.8%	33%	\$54,885,738	\$49,652,230	10.8%
111 Hotels, Motels Selling Food - W/BWL*	\$20,624,791	\$20,603,923	0.1%	100%	\$20,624,831	\$20,603,923	0.1%
112 Restaurants and Night Clubs - W/BWL*	\$117,119,654	\$109,676,357	6.8%	33%	\$38,969,135	\$36,558,786	6.8%
306 General Merchandise	\$104,798,951	\$76,173,027	37.6%	5%	\$5,239,947	\$3,808,651	37.6%
407 Automobile, Bus and Truck Rentals**	\$32,101,097	\$29,247,151	9.6%	90%	\$27,719,686	\$26,322,436	9.6%
706 Airlines - Commercial	\$363,607	\$227,344	59.9%	50%	\$181,803	\$113,672	59.9%
901 Hotels, Motels, Apartments, Cottages	\$54,743,198	\$46,639,294	17.4%	100%	\$54,743,198	\$46,639,294	17.4%
925 Recreation and Amusement Places	\$4,335,049	\$3,709,089	16.9%	50%	\$2,167,524	\$1,854,545	16.9%
<b>Tourism Tax Categories Subtotal</b>	<b>\$499,066,622</b>	<b>\$435,232,877</b>	<b>14.7%</b>	<b>-</b>	<b>\$204,531,866</b>	<b>\$185,553,537</b>	<b>10.2%</b>
All Sales Tax Categories Subtotal	\$1,892,157,334	\$1,820,061,181	4.0%				

