

# Maryland Tourism Monitor

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

## Web Marketing

Web site visitation in Fiscal Year 2016 has decreased 40 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, however the percent decline improved nearly 4 percent from the previous month. In FY16, more than 246,025 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 2,400 requests for travel kits have been received via the website. The online advertising budget for FY2016 through August 2015 is 31 percent lower than last year, while overall advertising expenditures – online, print and broadcast – increased 3 percent through August 2015.

Request Type	FY 2016 YTD	FY 2015 YTD	Change
Website unique visitors*	362,378	603,602	(39.9%)
Web advertising clicks	246,025	300,684	(18.2%)
Web travel kit requests	2,391	3,969	(39.8%)
Online advertising budget	\$80,312	\$116,703	(31.1%)

## Newsletters

Consumer – More than 136,836 prospective visitors received the e-newsletter in August 2016. The number of subscribers increased 2.7 percent from last year. Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 7,732 subscribers in August 2016 – 12 percent less than last year.

## Social Media

The number of *TravelMD* Facebook fans has grown 22 percent this year compared to FY2015. 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 almost 3,400 visitors to click to *VisitMaryland.org* and 1,147 Twitter followers were driven to the site.

	FY2016 YTD	FY2015 YTD	Change
Facebook fans	26,261	21,521	22.0%
Twitter followers	32,015	24,291	31.8%

\* 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), [www.fishandhuntmaryland.com](http://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 39.8 percent less on print advertising than last year and there was a 8.3 percent decrease in advertising requests. Broadcast requests also decreased despite the increase in dollars allocated to broadcast. The top five lead-generating publications during the Month of August were: Oprah, Southern Living, AAA/Rand Combined, Better Homes and Gardens, & Family Circle.

Request Type	FY2016 YTD	FY2015 YTD	Change
Print advertising requests	5,624	6,136	(8.3%)
Print ad budget	\$20,604	\$34,209	(39.8%)
Broadcast leads	701	1,142	(38.6%)
Broadcast ad budget	\$330,880	\$268,643	23.2%

## Communications Efforts

Thus far in FY2016, communications activities such as press outreach, familiarization tours and visiting journalists generated \$193,278 in advertising value for Maryland tourism products and services, a decline of approximately \$2.2mm year over year – which can be correlated to last year's Star Spangled events.

## Welcome Centers

Governor Hogan has re-opened two welcome centers to help foster the Maryland tourism industry. The numbers from the re-opening of Sideling Hill and Youghioghney Overlook will be reflected in future monitors; current welcome centers: two on either side of I-70, two on I-95 south of Baltimore and the Mason-Dixon Center in Emmitsburg, saw nearly 66,660 travelers visit, a decrease of 1.7% from last year.

Kiosks at the I-70 Welcome Centers recorded 339 sessions this FY16, 62.5 percent less than last year. Part of this decline can be attributed to problems with the kiosk's touch screens which have been remedied.

## Amtrak

The Amtrak train system in Maryland recorded 147,640 non-commuter arrivals in Fiscal Year 2016— close to 5.5 percent less travelers than last year at this time.

## BWI Airport

BWI served more than 2.15mm domestic passenger arrivals and more than 127,000 international arrivals in FY2016 through August 31. Total arrivals and international arrivals increased 5.6 and 46.3 percent respectively compared to last year.

## Leisure and Hospitality Employment

In August, 2015 employment in Maryland’s Leisure and Hospitality sector increased nearly 3 percent compared to last year. At the national level, employment during the same month in these three industries saw an overall increase of 3.6 percent.

	August 2015	August 2014	Change
Arts, Entertainment, Recreation	57,600	49,500	16.3%
Accommodation	26,300	28,600	(8%)
Food Services	206,900	204,600	1.1%
<b>Total</b>	<b>290,800</b>	<b>282,700</b>	<b>2.9%</b>

## Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in August, 2015 increased 0.4 percent, while room revenue increased 2.7 percent. At the national level, the number of rooms sold decreased by 0.3 percent and room revenue grew 3.3 percent.

## Gaming Revenue (in millions)

FY2016 has yielded close to \$197 million in revenue, an increase of 24.4 percent compared to last year’s \$158.5 million through August 31.

Gaming Facility	FY2016 YTD (in millions)	FY2015 TYD (in millions)	Change
Perryville, VLT	\$11.5	\$12.7	(9.5%)
Perryville, Table	\$1.9	\$2.2	(13.6%)
Maryland Live, VLT	\$71.8	\$76.7	(6.4%)
Maryland Live, Table	\$37.2	\$40.8	(8.9%)
Ocean Downs, VLT	\$12.5	\$12	4.1%
Rocky Gap, VLT	\$7.5	\$7.3	2.7%
Rocky Gap, Table	\$1.2	\$1.1	9%
Horseshoe VLT	\$26.7	\$4.4	506.8%
Horseshoe Table	\$25.2	\$1.3	1838.5%
<b>Combined Total</b>	<b>\$196.6</b>	<b>\$158.5</b>	<b>24.4%</b>

Source: Maryland Lottery

## Tourism Sales Tax Revenues

Tourism-related tax codes increased 12.4 percent while overall sales tax collections over the same time period grew 5.4 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller (\$86,070,706) – increased 5.4 as well.

Sales Tax Category	TOTAL SALES TAX REVENUES (\$)			Factor	TOURISM TAX REVENUES (\$)		
	FY2016 YTD	FY2015 YTD	% Change		FY2016 YTD	FY2015 YTD	% Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	\$67,362,662	\$61,022,413	10.3%	33%	\$22,454,220	\$20,340,804	10.3%
111 Hotels, Motels Selling Food - W/BWL*	\$8,730,480	\$9,232,508	(5.4%)	100%	\$8,730,480	\$9,232,507	(5.4%)
112 Restaurants and Night Clubs - W/BWL*	\$48,415,160	\$48,037,947	0.8%	33%	\$16,138,386	\$16,012,648	0.8%
306 General Merchandise	\$41,720,870	\$27,435,828	52.1%	5%	\$2,086,043	\$1,371,791	52.1%
407 Automobile, Bus and Truck Rentals**	\$12,846,103	\$12,892,160	(0.4%)	90%	\$11,561,493	\$11,602,943	(0.3%)
706 Airlines - Commercial	\$167,383	\$102,428	63.4%	50%	\$83,691	\$51,214	63.4%
901 Hotels, Motels, Apartments, Cottages	\$24,071,645	\$22,363,253	7.6%	100%	\$24,071,645	\$22,363,253	7.6%
925 Recreation and Amusement Places	\$1,889,488	\$1,429,944	32.1%	50%	\$944,744	\$714,972	32.1%
<b>Tourism Tax Categories Subtotal</b>	<b>\$205,203,795</b>	<b>\$182,516,480</b>	<b>12.4%</b>	<b>-</b>	<b>\$86,070,706</b>	<b>\$81,690,135</b>	<b>5.4%</b>
All Sales Tax Categories Subtotal	\$763,317,994	\$724,122,929	5.4%				