

Maryland Tourism Monitor

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

Web Marketing

Web site visitation in Fiscal Year 2016 has 55.5 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. In FY16, visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 3,200 requests for travel kits have been received via the web site. Although the online advertising budget for FY2016 thus far is 25.7 percent lower than 2015, aside from Star Spangled traffic, significant regular traffic and social traffic increases continue to be experienced.

Request Type	FY 2016 YTD	FY 2015 YTD	Change
Website unique visitors*	535,864	1,205,271	(55.5%)
Web advertising clicks	479,899	393,588	21.9%
Web travel kit requests	3,160	6,688	(52.8)
Online advertising budget	\$131,174	\$176,537	(25.7%)

Newsletters

Consumer – More than 136,077 prospective visitors received the e-newsletter so far in FY2016. The number of subscribers increased 2.6 percent from last year.
Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 7,830 subscribers in FY2016 – 11.8 percent less than last year.

Social Media

The number of *TravelMD* Facebook fans has grown nearly 20 percent this year compared to FY2015. OTD Twitter followers have grown an astounding 31 percent year over year.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed almost 4,700 visitors to click to *VisitMaryland.org* and 1,600 Twitter followers were driven to the site.

	FY2016 YTD	FY2015 YTD	Change
Facebook fans	26,598	22,297	19.3%
Twitter followers	32,499	24,807	31%

* 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 15 percent less on print advertising than last year and there was a 3.9 percent decrease in advertising requests. The top five lead-generating publications this month were: *Oprah*, *Southern Living*, *Better Homes and Gardens*, *AAA World* and *Family Circle*.

Request Type	FY2016 YTD	FY2015 YTD	Change
Print advertising requests	7,652	7,962	(3.9%)
Print ad budget	\$47,908	\$56,392	(15%)
Broadcast leads	902	1,544	(41.6%)
Broadcast ad budget	\$420,815	\$472,648	(11%)

Communications Efforts

Through September 30th, 2015, communications activities such as press outreach, familiarization tours and visiting journalists generated \$667,542 in advertising value for Maryland tourism products and services. A pace which currently eclipses past YTD totals aside from FY15 given the influx of media for the Star Spangled events.

Welcome Centers

Maryland 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 93,970 travelers visit, a decrease of approximately 5% from last year.

Kiosks at the I-70 Welcome Centers recorded 511 sessions thus far YTD in FY16. This number has been hampered by touch screen difficulties which have been remedied and the percentage divergence has been shrinking since repairs were completed.

Amtrak

The Amtrak train system in Maryland recorded 221,800 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 950k total travelers in September and YTD more than 3.1mm domestic passenger arrivals and over 150k international arrivals in FY2016 through August 31. This represents significant year over year positive increases of over 5 and 40 percent for domestic and international respectively.

Leisure and Hospitality Employment

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

	August 2015	August 2014	Change
Arts, Entertainment, Recreation	49,500	43,600	13.5%
Accommodation	24,400	26,900	(9.2%)
Food Services	199,100	194,600	2.3%
Total	273,000	265,100	3%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in September, 2015 increased 3 percent, while room revenue increased 23.8 percent. At the national level, the number of rooms sold increased by 4.6 percent and room revenue grew 9.3 percent.

Gaming Revenue (in millions)

FY2016 has yielded over \$283 million in revenue, an increase of 18.5% percent compared to last year's \$239 million through September 30.

Gaming Facility	FY2016 YTD (in millions)	FY2015 YTD (in millions)	Change
Perryville, VLT	\$16.7	\$17.7	(5.6%)
Perryville, Table	\$2.9	\$3.1	(6.4%)
Maryland Live, VLT	\$104	\$102.5	1.4%
Maryland Live, Table	\$54.6	\$58.6	(6.8%)
Ocean Downs, VLT	\$18.1	\$17	6.5%
Rocky Gap, VLT	\$10.9	\$10.5	3.8%
Rocky Gap, Table	\$1.7	\$1.5	13.3%
Horseshoe VLT	\$39.8	\$17.7	124.9%
Horseshoe Table	\$34.3	\$10.4	229.9%
Combined Total	\$283.1	\$239	18.5%

Source: Maryland Lottery

Tourism Sales Tax Revenues

Tourism-related tax codes increased 12 percent while overall sales tax collections over the same time period grew 4.5 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller (\$124,656,590) – increased 4.7 percent.

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*	\$99,548,922	\$90,872,557	9.5%	33%	\$33,182,740	30,290,852	9.5%
111 Hotels, Motels Selling Food - W/BWL*	\$12,441,991	\$13,639,374	(8.7%)	100%	\$12,442,031	13,639,374	(8.8%)
112 Restaurants and Night Clubs - W/BWL*	\$70,768,041	\$70,121,193	0.9%	33%	\$23,589,347	23,373,731	0.9%
306 General Merchandise	\$62,856,755	\$42,692,882	47.2%	5%	\$3,142,837	2,134,644	47.2%
407 Automobile, Bus and Truck Rentals**	\$19,720,054	\$18,611,107	5.6%	90%	\$16,576,748	16,749,996	(1%)
706 Airlines - Commercial	\$192,095	\$133,733	43.6%	50%	\$96,047	66,867	43.6%
901 Hotels, Motels, Apartments, Cottages	\$34,285,876	\$31,622,663	8.4%	100%	\$34,285,876	31,622,663	8.4%
925 Recreation and Amusement Places	\$2,681,921	\$2,370,976	13.1%	50%	\$1,340,960	1,185,488	13.1%
Tourism Tax Categories Subtotal	\$302,494,957	\$270,064,485	12%	-	\$124,656,590	\$119,063,615	4.7%
All Sales Tax Categories Subtotal	\$1,146,222,280	\$1,097,172,378	4.5%				