

# Maryland Tourism Monitor

Recap of Maryland's travel & tourism trends, monitored by the Office of Tourism Development (Data through January 2016)

## Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. To date, OTD spent 18.4 percent less on print advertising than last year and there was a 1.2 percent decline in advertising requests. Broadcast requests decreased 47.7 percent with a budget that was 14.6 percent lower. The top lead-generating publications in January were: *Travel Information (AAA/Rand Combined)*, *Southern Living*, *AAA World*, and *Civil War Traveler*.

Request Type	FY 2016 YTD	FY 2015 YTD	Change
Print advertising requests	12,845	13,004	(1.2%)
Print ad budget	\$52,345	\$64,178	(18.4%)
Broadcast leads	1,578	3,018	(47.7%)
Broadcast ad budget	\$466,319	\$546,353	(14.6%)

## Website Visitation

More than one million visits to OTD associated websites through January 2016 can be attributed, in part, to almost 585,000 internet advertising clicks. Although the year's online advertising budget to date is nearly 19 percent less than last year's, there has been an 11.1 percent increase in total web advertising clicks and over 5,000 online web travel kit requests. As a new metric, the MD Tourism Monitor will now report total outbound traffic to our partner sites from VisitMaryland.org. During January 2016, more than 11,500 outbound links were clicked to event and partner websites.

Request Type	FY 2016 YTD	FY 2015 YTD	Change
Website unique visitors*	1,005,311	1,852,455	(45.7%)
Web advertising clicks	584,195	525,737	11.1%
Web travel kit requests	5,232	13,668	(61.7%)
Online advertising budget	\$199,252	\$245,065	(18.7)

\* 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), 1812 battles websites, [fishandhuntmaryland.com](http://fishandhuntmaryland.com), and [industry.visitmaryland.org](http://industry.visitmaryland.org).

## Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated just over \$3 million in advertising value for Maryland tourism products and services, a 58 percent decrease from approximately \$7.3 million the previous fiscal year.

## Social Media

The number of *TravelMD* Facebook fans has grown 18 percent this fiscal year compared to last. OTD Twitter followers have grown 26 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 435 visitors to click to *VisitMaryland.org* and 339 Twitter followers were driven to the site in January. Through FY2016 – there has been a total of 13,423 sessions referred via all social media outlets.\*\*

The top referring social media websites continue to be: Facebook, Twitter, TripAdvisor, and Pinterest.

	FY 2016 YTD	FY 2015 YTD	Change
Facebook fans	28,327	24,007	18.0%
Twitter followers	34,456	27,343	26.0%

\*\*All social media outlets includes, but is not limited to: Facebook, Twitter, TripAdvisor, Pinterest, Weebly, Google+, Meetup, Foursquare, and LinkedIn.

## Newsletters

Consumer – 135,322 prospective visitors received the e-newsletter in January. The number of subscribers decreased 5 percent from the previous year.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to 8,171 subscribers in January – 5.7 percent more than the previous year.

## Welcome Centers

In January, 14,419 travelers visited these welcome centers, a 13.5 percent decrease from the previous year. During this fiscal year, welcome centers have received close to 183,000 visitors, a decrease of 0.3% percent from last year.

Kiosks at the I-70 Welcome Centers have recorded more than 1,000 sessions this fiscal year, 47.8 percent less than last year due to terminal malfunctions and repairs earlier in the year.

## Amtrak

The Amtrak train system in Maryland recorded 523,900 non-commuter arrivals this fiscal year, a decrease of 3.9 percent from last year.

## BWI Airport

BWI served more than 760,000 domestic passenger arrivals and close to 54,000 international arrivals in January 2015. This fiscal year, total arrivals have increased 9.2 percent compared to last fiscal year with international arrivals seeing a 35.1 percent increase.

## Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 4.5 percent in January compared to last year. At the national level, employment in these three industries also saw an overall increase of 2.8 percent.

	January 2016	January 2015	Change
Arts, Entertainment, Recreation	38,300	40,000	(4.3%)
Accommodation	21,100	20,200	4.5%
Food Services	193,500	181,800	6.4%
<b>Total</b>	<b>252,900</b>	<b>242,000</b>	<b>4.5%</b>

## Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in January 2015 increased 4.8 percent, while room revenue increased 5.8 percent. At the national level, the number of rooms sold increased by 1.2 percent and room revenue grew 4.0 percent.

## Gaming Revenue (in millions)

This year fiscal year through January, gaming facilities generated more than \$650 million in revenue, an increase of 11 percent compared to last year's \$586.6 million.

Gaming Facility	FY 2016 YTD (In millions)	FY 2015 YTD (In millions)	Change
Hollywood, VLT	\$37.1	\$38.3	(3.0%)
Hollywood, Table	\$6.7	\$6.8	(2.2%)
Ocean Downs, VLT	\$34.3	\$31.2	9.9%
Maryland Live, VLT	\$238.2	\$229.4	3.9%
Maryland Live, Table	\$133.4	\$135.5	(1.5%)
Rocky Gap, VLT	\$23.5	\$19.3	7.4%
Rocky Gap, Table	\$3.8	\$3.6	5.4%
Horseshoe, VLT	\$93.3	\$67.6	37.9%
Horseshoe, Table	\$81.0	\$52.4	54.5%
<b>Combined Total</b>	<b>\$651.2</b>	<b>\$586.6</b>	<b>11.0%</b>

Source: Maryland Lottery

## Tourism Sales Tax Revenues

Sales and use tax data for the first seven months of Fiscal Year 2016 is now available. Tourism-related tax codes increased 14.1 percent while overall sales tax collections over the same time period decreased almost 9 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller – increased 14.9 percent, outperforming overall sales tax collections.

Sales Tax Category	TOTAL SALES TAX REVENUES (\$)			Factor	TOURISM TAX REVENUES (\$)		
	FY 2016 YTD	FY 2015 YTD	% Change		FY 2016 YTD	FY 2015 YTD	% Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	\$222,573,920	\$205,964,124	8.2%	33%	\$74,099,716	\$68,654,708	8.2%
111 Hotels, Motels Selling Food - W/BWL*	\$25,745,742	\$25,009,328	2.9%	100%	\$25,745,782	\$25,009,328	2.9%
112 Restaurants and Night Clubs - W/BWL*	\$153,734,560	\$148,941,958	3.2%	33%	\$51,116,144	\$49,647,319	3.2%
306 General Merchandise	\$147,748,034	\$126,511,862	16.8%	5%	\$7,383,730	\$6,325,593	16.8%
407 Automobile, Bus and Truck Rentals**	\$46,807,582	\$39,666,520	18.0%	90%	\$36,733,849	\$35,699,868	18.0%
706 Airlines - Commercial	\$439,108	\$298,303	47.2%	50%	\$219,533	\$149,151	47.2%
901 Hotels, Motels, Apartments, Cottages	\$68,849,737	\$57,498,659	19.7%	100%	\$68,849,737	\$57,498,659	19.7%
925 Recreation and Amusement Places	\$5,562,207	\$5,026,342	10.6%	50%	\$2,781,102	\$2,513,171	10.6%
<b>Tourism Tax Categories Subtotal</b>	<b>\$671,460,890</b>	<b>\$608,917,095</b>	<b>10.3%</b>	<b>-</b>	<b>\$266,929,593</b>	<b>\$245,497,797</b>	<b>8.7%</b>
All Sales Tax Categories Subtotal	\$2,342,984,191	\$2,574,274,748	(8.98%)				