

Maryland Tourism Monitor

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

Consumer Interactions

OTD receives requests for travel kits in response to print, radio and TV advertising. To date, OTD spent 30.6 percent less on print advertising than last year and there was related decrease in advertising requests. Broadcast requests remain lower year over year, however recent increases in marketing have begun to re-accelerate incoming leads.

Request Type	FY 2016 YTD	FY 2015 YTD	Change
Print advertising requests	25,603	31,525	(18.8%)
Print ad budget	\$175,719	\$253,136	(30.6%)
Broadcast leads	2,378	4,746	(49.9%)
Broadcast ad budget	1,096,631	\$889,864	23.2%

Web Marketing

This year's web site visitation through decreased 18.3 compared to last year, according to Google Analytics. More than 889,000 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising and nearly 11,000 requests for travel kits have been received via the web site. The year's online advertising budget to date is comparable to last years.

Request Type	FY 2016 YTD	FY 2015 YTD	Change
Website unique visitors*	1,826,489	2,235,632	(18.3%)
Web advertising clicks	889,616	785,481	13.3%
Web travel kit requests	10,542	20,240	(47.9%)
Online advertising budget	\$427,773	\$428,368	(0.1%)

Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated close to \$19 million in advertising value for Maryland tourism products and services, a nearly 100% increase from the \$9.9 million the previous year.

Social Media

The number of *TravelMD* Facebook fans has grown 24.5 percent this fiscal year compared to last. OTD Twitter followers have grown 19.7 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 2,439 visitors to click to *VisitMaryland.org* and 515 Twitter followers were driven to the site in May.

	FY 2016 YTD	FY 2015 YTD	Change
Facebook fans	31,395	25,221	24.5%
Twitter followers	36,187	30,233	19.7%

Partner Referrals & Outbound Clicks

27,421 Outbound links to industry partners and events were clicked via the *VisitMaryland.org* website during the Month of May. OTD now tracks the performance of outbound links in 9 Categories; beginning in FY2017, OTD will report both the monthly and FY totals of outbound clicks to better provide insights in to consumer interests.

Category	Monthly Clicks	Clicks FYTD
Events	12,382	-
Attractions	7,453	-
Accommodations	4,862	-
Dining	1,721	-
Arts & Culture	770	-
Golf	94	-
Shopping	84	-
Entertainment/Nightlife	30	-
Parks, Nature, Scenic	25	-

Welcome Centers

299,743 Visitors have visited the welcome centers through May 2016. Last year, 287,707 visitors were accounted for through May – representing a 4.2% increase. 1,644 unique kiosk sessions have been logged, a 29.5% decrease that is mainly due to previous technological issues.

Amtrak

The Amtrak train system in Maryland recorded 836,200 non-commuter arrivals this fiscal year, nearly static in comparison to the previous year.

BWI Airport

BWI served more than 1,086,000 domestic passenger arrivals and close to 60,000 international arrivals in May 2016. This fiscal year, total arrivals have increased 7.8 percent compared to last with international arrivals seeing a 29.2 percent increase; total traffic has increased 8.9 percent year over year.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 2.9 percent in May compared to last year.

	May 2016	May 2015	Change
Arts, Entertainment, Recreation	50,000	52,200	(4.8%)
Accommodation	25,200	24,000	5.0%
Food Services	212,400	203,400	4.4%
Total	287,600	279,600	2.9%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in May 2016 increased 3.5 percent, while room revenue increased 5.3 percent. This United States market as a whole saw room demand increase 1.1 percent and revenue increase 3.5 percent.

Gaming Revenue (in millions)

This year fiscal year through May, gaming facilities generated more than one billions dollars in revenue, an increase of 11.1 percent compared to last year's \$946 million.

Gaming Facility	FY 2016 YTD (In millions)	FY 2015 YTD (In millions)	Change
Hollywood, VLT	\$60.5	\$60.6	(0.1%)
Hollywood, Table	\$10.7	\$11.0	(2.6%)
Ocean Downs, VLT	\$52.5	\$47.8	9.7%
Maryland Live, VLT	\$376.9	\$358.9	5.0%
Maryland Live, Table	\$220.2	\$213.8	3.0%
Rocky Gap, VLT	\$37.6	\$34.9	8.0%
Rocky Gap, Table	\$6.2	\$6.1	2.3%
Horseshoe, VLT	\$154.7	\$119.3	29.7%
Horseshoe, Table	\$131.2	\$93.3	40.6%
Combined Total	\$1,020.6	\$945.8	11.1%

Source: Maryland Lottery

Tourism Sales Tax Revenues

Sales and use tax data for the first eleven months of Fiscal Year 2016 is now available. Tourism-related tax codes increased 9.0 percent while overall sales tax collections over the same time period grew 2.8 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller – increased 5.6 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	\$353,461,049	\$327,076,114	8.1%	33%	\$116,642,146	\$109,025,371	8.1%
111 Hotels, Motels Selling Food - W/BWL	\$35,882,358	\$37,305,323	(3.8%)	100%	\$35,882,358	\$37,305,323	(3.8%)
112 Restaurants and Night Clubs - W/BWL	\$240,314,571	\$236,413,400	1.7%	33%	\$79,303,808	\$78,804,467	1.7%
306 General Merchandise	\$243,164,425	\$199,453,257	21.9%	5%	\$12,158,221	\$9,972,663	21.9%
407 Automobile, Bus and Truck Rentals	\$63,773,017	\$60,740,711	5.0%	90%	\$57,395,715	\$54,666,639	5.0%
706 Airlines - Commercial	\$579,343	\$453,693	27.7%	50%	\$289,671	\$226,847	27.7%
901 Hotels, Motels, Apartments, Cottages	\$97,761,785	\$88,372,664	10.6%	100%	\$97,761,785	\$88,372,664	10.6%
925 Recreation and Amusement Places	\$8,393,782	\$7,654,486	9.7%	50%	\$4,196,891	\$3,827,243	9.7%
Tourism Tax Categories Subtotal	\$1,043,330,334	\$957,469,647	9.0	-	\$403,630,599	\$382,201,217	5.6%
All Sales Tax Categories Subtotal	\$4,115,868,190	\$4,003,224,649	2.8%				