

# Maryland Tourism Monitor

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

## Consumer Interactions

### Print:

Through Fiscal Year 2016, OTD spent approximately 50 percent more on its broadcast ad budget than during Fiscal year 2015. Despite the increase – print & broadcast consumer interactions decreased between 15 and 46 percent.

Request Type	FY 2016 YTD	FY 2015 YTD	Change
Print advertising requests	30,936	36,481	(15.2%)
Print ad budget	\$196,496	\$264,636	(25.7%)
Broadcast leads	2,626	4,877	(46.2%)
Broadcast ad budget	\$1,708,459	\$1,138,823	50.0%

### Web:

This year's web site visitation through June decreased 15.6 percent compared to last year, according to Google Analytics. More than 1,078,000 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising. The increase in web advertising clicks, 2.5 percent, can be attributed to the increase in online advertising budget, 23.8% - however web travel kit requests fell 44.5 percent this fiscal year.

Interaction Type	FY 2016 YTD	FY 2015 YTD	Change
Website unique visitors*	2,212,985	2,622,498	(15.6%)
Web advertising clicks	1,078,050	1,051,810	2.5%
Web travel kit requests	12,033	21,670	(44.5%)
Online advertising budget	\$571,104	\$461,152	23.8%

\* 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.industry.visitmaryland.org](http://www.industry.visitmaryland.org), [www.fishandhuntmaryland.com](http://www.fishandhuntmaryland.com).

## Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated in excess of \$12 million in advertising value for Maryland tourism products and services, a nearly 30% increase from the previous fiscal year.

## Social Media

The number of *TravelMD* Facebook fans has grown 26.7 percent this fiscal year compared to last. OTD Twitter followers have grown 18.5 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 8,283 visitors to click to *VisitMaryland.org* and 762 Twitter followers were driven to the site in June.

	FY 2016 YTD	FY 2015 YTD	Change
Facebook fans	32,355	25,541	26.7%
Twitter followers	36,536	30,821	18.5%

## Partner Referrals & Outbound Clicks

OTD's web site received more than 2 million unique visitors annually. OTD reports on site engagement through a variety of measurements. One of these measurements is outbound traffic to its partner sites: events remain the number one outbound link, followed by attractions and accommodations.

Category	Monthly Clicks	Clicks FYTD
Events	13,566	-
Attractions	9,841	-
Accommodations	6,604	-
Dining	2,122	-
Arts & Culture	748	-
Golf	92	-
Shopping	75	-
Entertainment/Nightlife	31	-
Parks, Nature, Scenic	50	-

## Welcome Centers

During this fiscal year, welcome centers have received 342,094 visitors, an increase of 6.8 percent from last year. This number continues to expand with the re-opening of several previously closed welcome centers and rest stops across the state.

Kiosks at the I-70 Welcome Centers have recorded 2,024 sessions this fiscal year, 19.7 percent less than last year. This decline can be attributed to problems with the kiosk's touch screens which rendered them temporarily out of order for several months.

## Amtrak

The Amtrak train system in Maryland recorded 919,500 non-commuter arrivals this fiscal year, an increase of approximately 1.5 percent year over year.

## BWI Airport

2.3 million passengers flew through BWI in June, a record for the month; passenger volume represented a 7.6 percent increase from the same month last year. BWI has set monthly records in each of the last 12 months. Total arrivals this fiscal year experienced an increase to 12,333,143 from 11,344,532 – an 8.7 percent leap.

## Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 4.7 percent in June compared to last year. At the national level, employment in these three industries also saw an overall increase of 2.3 percent.

	June 2016	June 2015	Change
Arts, Entertainment, Recreation	60,700	58,100	4.5%
Accommodation	26,700	25,900	3.1%
Food Services	221,200	210,800	4.9%
<b>Total</b>	<b>308,600</b>	<b>294,800</b>	<b>4.7%</b>

## Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in June 2015 increased 3.7 percent, while room revenue increased 5.3 percent. Nationally, room demand increased 1.9 percent while revenue increased a comparable 5.4 percent.

## Gaming Revenue (in millions)

This year fiscal year through June, gaming facilities generated more than 1.14 billion dollars in revenue, an increase of 10.6 percent from last year's \$1.03 billion.

Gaming Facility	FY 2016 YTD (In millions)	FY 2015 YTD (In millions)	Change
Hollywood, VLT	\$65.7	\$66.1	(0.7%)
Hollywood, Table	\$11.6	\$11.9	(2.9%)
Ocean Downs, VLT	\$57.6	\$53.1	8.4%
Maryland Live, VLT	\$408.8	\$391.8	4.3%
Maryland Live, Table	\$242.0	\$233.8	3.5%
Rocky Gap, VLT	\$41.3	\$38.0	8.7%
Rocky Gap, Table	\$6.7	\$6.6	0.8%
Horseshoe, VLT	\$168.3	\$131.7	27.8%
Horseshoe, Table	\$144.8	\$104.0	39.2%
<b>Combined Total</b>	<b>\$1,146.7</b>	<b>\$1,037.2</b>	<b>10.6%</b>

Source: Maryland Lottery

## Tourism Sales Tax Revenues

Sales and use tax figures for the complete 2016 Fiscal Year are now available. Tourism-related tax codes increased 8.7 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 5.3 percent outperforming overall sales tax collections.

TOTAL SALES TAX REVENUES (\$)				TOURISM TAX REVENUES (\$)			
Sales Tax Category	FY 2016 YTD	FY 2015 YTD	% Change	Factor	FY 2016 YTD	FY 2015 YTD	% Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL	\$388,518,454	\$360,202,612	7.9%	33%	\$128,211,090	\$120,067,537	7.9%
111 Hotels, Motels Selling Food - W/BWL	\$40,015,279	\$42,189,903	(5.2%)	100%	\$40,015,279	\$42,189,903	(5.2%)
112 Restaurants and Night Clubs - W/BWL	\$265,536,190	\$261,540,255	1.5%	33%	\$87,626,943	\$87,180,085	1.5%
306 General Merchandise	\$268,734,818	\$221,347,376	21.4%	5%	\$13,436,740	\$11,067,369	21.4%
407 Automobile, Bus and Truck Rentals	\$70,843,969	\$67,171,249	5.5%	90%	\$63,759,572	\$60,454,124	5.5%
706 Airlines - Commercial	\$616,251	\$478,441	28.8%	50%	\$308,125	\$239,221	28.8%
901 Hotels, Motels, Apartments, Cottages	\$110,380,877	\$100,431,618	9.9%	100%	\$110,380,877	\$100,431,618	9.9%
925 Recreation and Amusement Places	\$9,275,532	\$8,605,180	7.8%	50%	\$4,637,766	\$4,302,590	7.8%
<b>Tourism Tax Categories Subtotal</b>	<b>\$1,153,921,373</b>	<b>\$1,061,966,635</b>	<b>8.7%</b>		<b>\$448,376,395</b>	<b>\$425,932,447</b>	<b>5.3%</b>
All Sales Tax Categories Subtotal	\$4,536,834,478	\$4,414,484,394	2.8%				