

Maryland Tourism Monitor

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

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. To date, OTD spent 20 percent less on print advertising than last year and there was a 1.1 percent decline in advertising requests. Broadcast requests decreased 48.2 percent with a budget that was 14.4 percent lower.

Request Type	FY 2016 YTD	FY 2015 YTD	Change
Print advertising requests	14,271	14,439	(1.1%)
Print ad budget	\$52,345	\$65,401	(20.0%)
Broadcast leads	1,780	3,442	(48.2%)
Broadcast ad budget	\$476,564	\$556,839	(14.4%)

Web Visitation

During the month of February, 14,706 outbound partner links were clicked via VisitMaryland.org. This year's web site visitation through February decreased 42.6 percent compared to last year, according to Google Analytics. More than 610,000 visits to *VisitMaryland.org* can be attributed to OTD's internet advertising; over 6,100 requests for travel kits have been received via the web site. Online advertising clicks have increased approximately 13.0 percent despite this year's online advertising budget to date is 16.1 percent lower.

Request Type	FY 2016 YTD	FY 2015 YTD	Change
Website unique visitors*	1,121,211	1,953,836	(42.6%)
Web advertising clicks	610,597	540,525	13.0%
Web travel kit requests	6,133	15,326	(60.0%)
Online advertising budget	\$210,186	\$250,536	(16.1%)

* 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, industry.visitmaryland.com, fishandhuntmaryland.com

Communications Efforts

This year's communications activities such as press outreach, familiarization tours and visiting journalists have generated close to \$5.9 million in advertising value for Maryland tourism products and services.

Social Media

The number of *TravelMD* Facebook fans has grown 18.9 percent this fiscal year compared to last. OTD Twitter followers have grown 24.5 percent.

Social media traffic continues to be strong, pushing users from all outlets to VisitMaryland.org, and thus our travel partners as well.

Facebook referred 1,244 users to VisitMaryland.org while Twitter referred 516, TripAdvisor – 126, and Pinterest – 43. Through February 29, 2016, all social media outlets have resulted in a total of 15,407 direct referrals.

	FY 2016 YTD	FY 2015 YTD	Change
Facebook fans	28,941	24,332	18.9%
Twitter followers	35,018	28,119	24.5%

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

Newsletters

Consumer – Nearly 135,820 prospective visitors received the e-newsletter in February. The number of subscribers decreased 3.6 percent from the same month last year.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to more than 8,765 subscribers in February – 13 percent more than last February.

Welcome Centers

Welcome Centers have begun to see a significant impact from the re-opening of both new centers in late 2015 by Governor Hogan. During this fiscal year, the centers have welcomed close to 211,000 visitors compared with 198,832 through this time in FY15. This represents a year over year increase of over 6 percent.

Kiosks at the I-70 Welcome Centers have recorded over 1,000 sessions this fiscal year.

Amtrak

The Amtrak train system in Maryland recorded 588,500 non-commuter arrivals this fiscal year, a decrease of approximately 3 percent less travelers than last year.

BWI Airport

During the month of February, almost 1.6 million passengers flew through BWI - representing a 13.6% increase over last year and eighth-straight monthly record. Through FY16, over 7.5 million domestic passengers and almost 400,000 international passengers have arrived via BWI; these are 8.5% (domestic) and 33.3% (international) percent increases year over year.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 3.7 percent in February compared to last year. At the national level, employment in these three industries also saw an overall increase of 6.9 percent.

	February 2016	February 2015	Change
Arts, Entertainment, Recreation	39,000	40,000	(0.25%)
Accommodation	21,400	20,400	4.9%
Food Services	192,500	183,500	4.9%
Total	252,900	243,900	3.7%

Tourism Sales Tax Revenues

Sales and use tax data for the first eight months of Fiscal Year 2016 is now available. Tourism-related tax codes increased 9.4 percent while overall sales tax collections over the same time period grew 3.3 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller – increased 5.0` percent, outperforming overall sales tax collections.

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in February 2016 increased 1.5 percent, while room revenue increased 1.4 percent. The number of rooms sold nationwide increased 0.8 percent while room revenue rose 4.4 percent.

Gaming Revenue (in millions)

This year fiscal year through February, gaming facilities generated more than \$744 million in revenue, an increase of 11.2 percent compared to last year's \$669 million.

Gaming Facility	FY 2016 YTD (In millions)	FY 2015 YTD (In millions)	Change
Hollywood, VLT	\$42.6	\$43.3	(1.6%)
Hollywood, Table	\$7.6	\$7.8	(1.9%)
Ocean Downs, VLT	\$38.2	\$34.5	10.6%
Maryland Live, VLT	\$271.9	\$258.4	5.2%
Maryland Live, Table	\$153.7	\$153.4	0.2%
Rocky Gap, VLT	\$26.7	\$24.7	8.1%
Rocky Gap, Table	\$4.4	\$4.2	6.0%
Horseshoe, VLT	\$107.6	\$80.7	33.4%
Horseshoe, Table	\$91.7	\$62.3	47.1%
Combined Total	\$744.6	\$669.4	11.2%

Source: Maryland Lottery

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*	\$252,217,605	\$232,680,637	8.4%	33%	\$83,231,809	\$76,784,610	8.4%
111 Hotels, Motels Selling Food - W/BWL*	\$25,216,143	\$27,192,942	(7.3%)	100%	\$25,216,143	\$27,192,942	(7.3%)
112 Restaurants and Night Clubs - W/BWL*	\$169,824,316	\$167,112,612	1.6%	33%	\$56,042,024	\$55,147,161	1.6%
306 General Merchandise	\$178,053,381	\$142,357,298	25.1%	5%	\$8,902,669	\$7,117,865	25.1%
407 Automobile, Bus and Truck Rentals**	\$45,877,589	\$44,177,969	3.8%	90%	\$41,289,830	\$39,760,172	3.8%
706 Airlines - Commercial	\$489,039	\$330,465	48.0%	50%	\$244,519	\$165,232	48.0%
901 Hotels, Motels, Apartments, Cottages	\$69,270,579	\$63,286,875	9.5%	100%	\$69,270,579	\$63,286,875	9.5%
925 Recreation and Amusement Places	\$6,103,885	\$5,663,325	7.8%	50%	\$3,051,942	\$2,831,662	7.8%
Tourism Tax Categories Subtotal	\$747,052,541	\$682,802,124	9.4%	-	\$287,249,519	\$273,619,166	5.0%
All Sales Tax Categories Subtotal	\$2,977,346,789	\$2,881,632,475	3.3%				