



The Economic Impact of Tourism in Maryland



Tourism Satellite Account
Calendar Year 2015



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MD tourism economy reaches new peaks

- The Maryland visitor economy continued to grow in 2015; tourism industry sales rose 3.3% to \$16.9 billion.
 - Visitor volumes expanded 5.8%, reaching 41.1 million visitors in 2015.
 - Leisure markets continue to drive performance.
 - Visitor spending has grown for six straight years, expanding by nearly a third since 2009.
- Visitor spending generated \$28.7 billion in total business sales across all Maryland industries in 2015.

Tourism is an economic engine

- Tourism supported 218,500 jobs, both directly and indirectly, accounting for 6.1% of total employment in Maryland.
- The tourism sector directly generated \$8.3 billion of state GDP in 2015.
- Including indirect and induced impacts, tourism in Maryland generated \$2.3 billion in state and local taxes and \$2.0 billion in Federal taxes last year.

Tourism-supported tax revenues surpassed \$1,040 per Maryland household in 2015.

One-in-16.5 jobs in the State of Maryland is supported by tourism.

Conceptual Overview



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Why quantify the tourism economy?

- By monitoring tourism's economic impact, policy makers can make informed decisions regarding the funding and prioritization of tourism development.
- It can also carefully monitor its successes and future needs.
- In order to do this, tourism must be measured in the same categories as other economic sectors – i.e. tax generation, employment, wages, and gross domestic product.

Why is this a challenge?

- Most economic sectors such as financial services, insurance, or construction are easily defined within a country's national accounts statistics.
- Tourism is not so easily measured because it is not a single industry. It is a demand-side activity which affects multiple sectors to various degrees.
- Tourism spans nearly a dozen sectors including lodging, recreation, retail, real estate, air passenger transport, food & beverage, car rental, taxi services, travel agents...

The Tourism Satellite Account

- The TSA was conceived by the UN World Tourism Organization and has since been ratified by the UN, Eurostat, and OECD.
- The standard has been adopted by over fifty countries around the world and a growing number of US States.
- The TSA deals with the challenge of measuring tourism in two important ways:
 - Defines the tourism economy
 - Provides methodology for calculating tourism GDP in a way that is consistent with economic accounts

Benefits of a TSA

- Enables comparisons of the importance of tourism to other sectors of the economy in terms of GDP, employment, and income.
- Allows for benchmarking to other destinations.
- Tracks the economic contribution of tourism over time.
- Monitors strength by tracking capital investment .
- Allows for extension analysis for of the full impact of tourism.

Important definitions

1. **Tourism Industry:** Measures the value of traveler activity within “tourism characteristic industries”. This concept measures only the direct impact of the travel industry.
2. **Tourism Economy:** Includes the tourism industry plus government spending and capital investment in support of tourism. This is the basis of the total economic impact analysis, including direct, indirect and induced impacts.

Illustrating the concepts

Travel & Tourism Industry

- The direct effect of visitor spending
- Focus of Tourism Satellite Account

Travel & Tourism Economy

The flow-through effect of all tourism demand across the economy

- Expands the focus to measure the overall impact of tourism on all sectors of the economy



Detailed State Results



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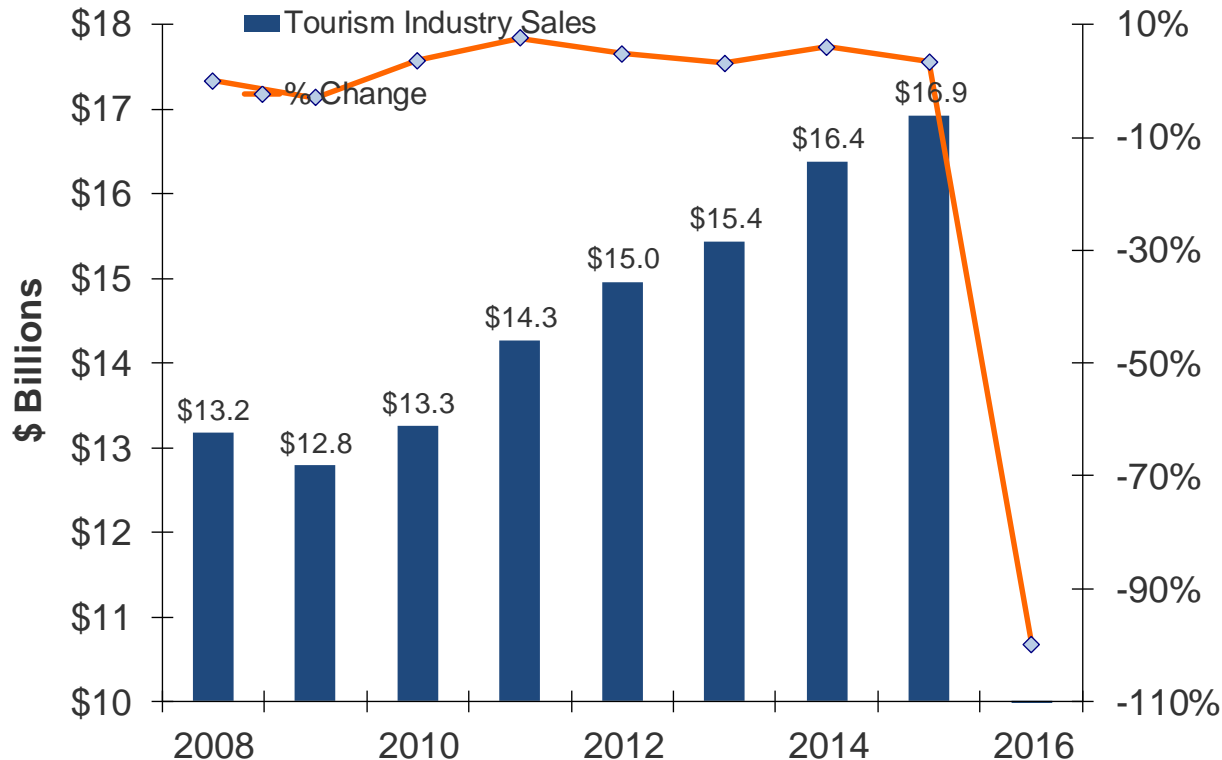
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Key volume and spending trends

- Visitor volume and visitor spending growth continued in 2015.
- Maryland tourism industry sales (visitor spending) increased 3.3% in 2015—the sixth straight year of growth.
- Lower gas prices spurred travel in 2015, providing a surge in day travel which outpaced overnight visits.
- Visitor spending on food & beverages and lodging services led all categories.
- Capital investment in the tourism industry continued to grow.

A new peak in tourism industry sales

- Visitor spending growth of 3.3% in 2015 brought tourism industry sales to \$16.8 billion.
- Visitor spending was \$4.1 billion higher in 2015 than in 2009.



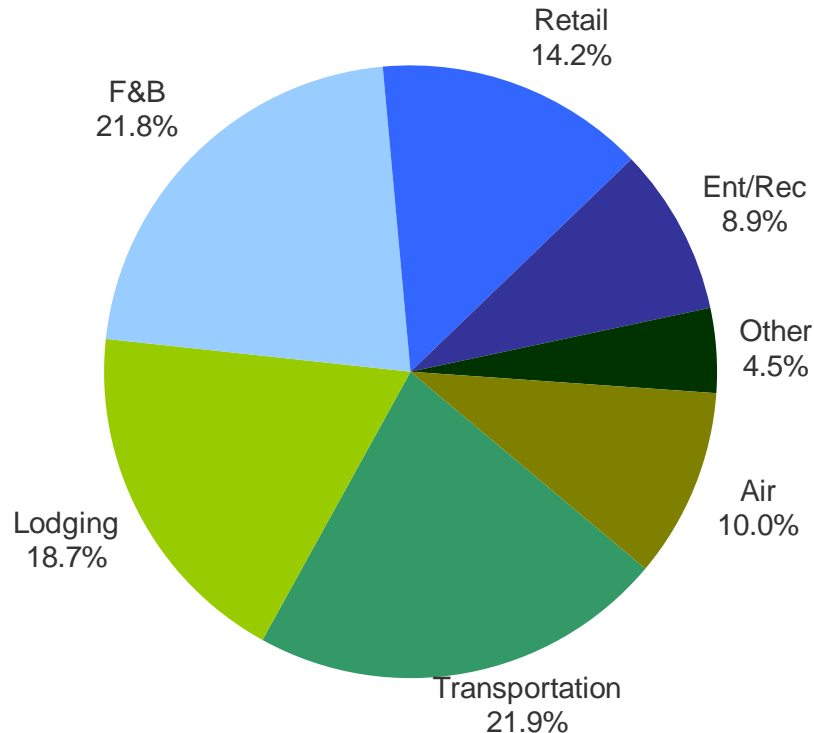
Benefits of the expansion were widespread

Tourism Industry Sales									
(Millions)									
Sector	2008	2009	2010	2011	2012	2013	2014	2015	% Change
Transportation	\$3,081.3	\$2,698.5	\$2,790.3	\$3,189.6	\$3,343.3	\$3,436.4	\$3,623.0	\$3,709.2	2.4%
Lodging	\$2,544.4	\$2,476.0	\$2,616.7	\$2,721.2	\$2,888.6	\$2,864.2	\$3,039.4	\$3,162.2	4.0%
F&B	\$2,682.4	\$2,710.4	\$2,757.0	\$2,874.1	\$3,079.3	\$3,234.7	\$3,479.6	\$3,697.0	6.2%
Retail	\$1,851.6	\$1,886.2	\$1,934.1	\$2,086.7	\$2,205.1	\$2,303.7	\$2,435.6	\$2,411.0	-1.0%
Ent/Rec	\$1,089.8	\$1,060.3	\$1,116.9	\$1,208.3	\$1,277.6	\$1,345.4	\$1,458.9	\$1,498.3	2.7%
Other	\$554.9	\$590.1	\$607.9	\$654.7	\$630.0	\$669.4	\$704.1	\$755.6	7.3%
Air	\$1,369.4	\$1,369.2	\$1,439.0	\$1,533.3	\$1,536.3	\$1,585.4	\$1,636.1	\$1,691.8	3.4%
TOTAL	\$13,173.8	\$12,790.6	\$13,261.8	\$14,267.9	\$14,960.1	\$15,439.2	\$16,376.9	\$16,925.2	3.3%
Pch Change		-2.9%	3.7%	7.6%	4.9%	3.2%	6.1%	3.3%	

- Tourism industry sales increased \$550 million in 2015, led by a \$217 million increase in food & beverage sales.
- Growth in food & beverage purchases was strongest among the key tourism industries, growing 6.2%.
- The lodging industry also performed well with revenue growth of 4.0%.

Tourism industry sales by sector

Tourism Industry by Sector



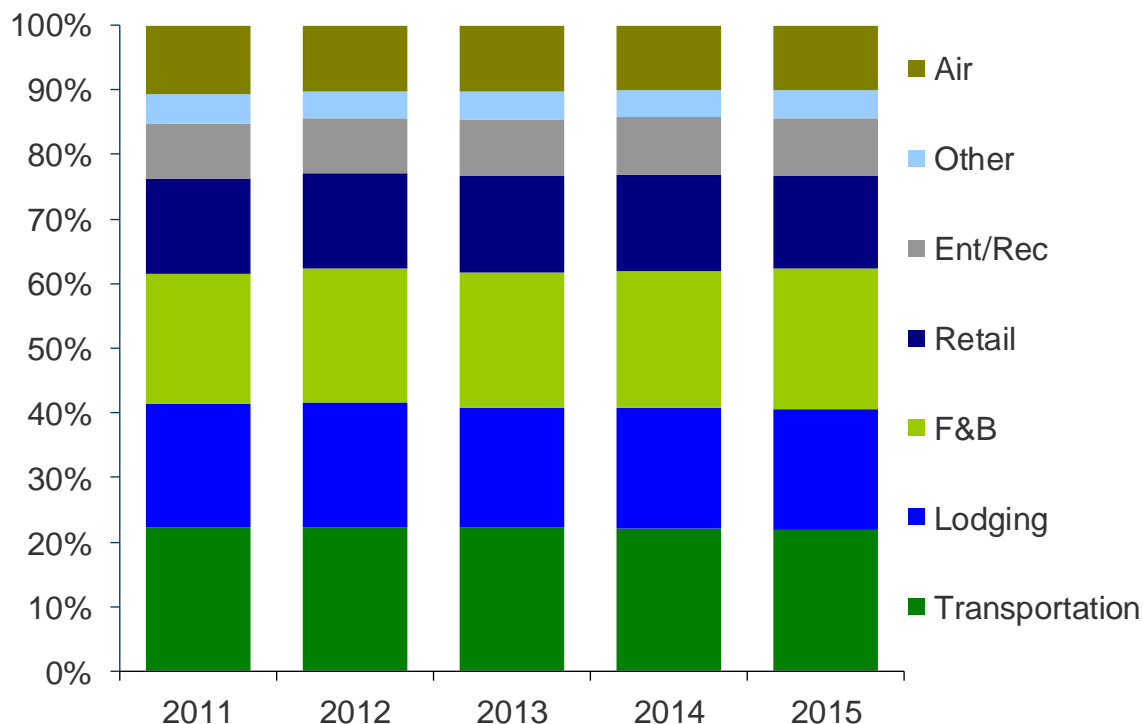
- More than 60% of visitor spending takes place in three industries: transportation, food & beverages and lodging.
- Transportation includes air transportation of both visitors to MD and MD resident flights to other destinations.

Tourism industry sales over time

- The share of the visitor dollar spent on food & beverages continued to rise in 2015, reaching a share not seen since 2009.
- Entertainment & recreation's share reached 8.9% of all visitor spending in 2015 after falling as low as 8.2% in 2009.

Maryland's Tourism Industry

by Year, Share of Total



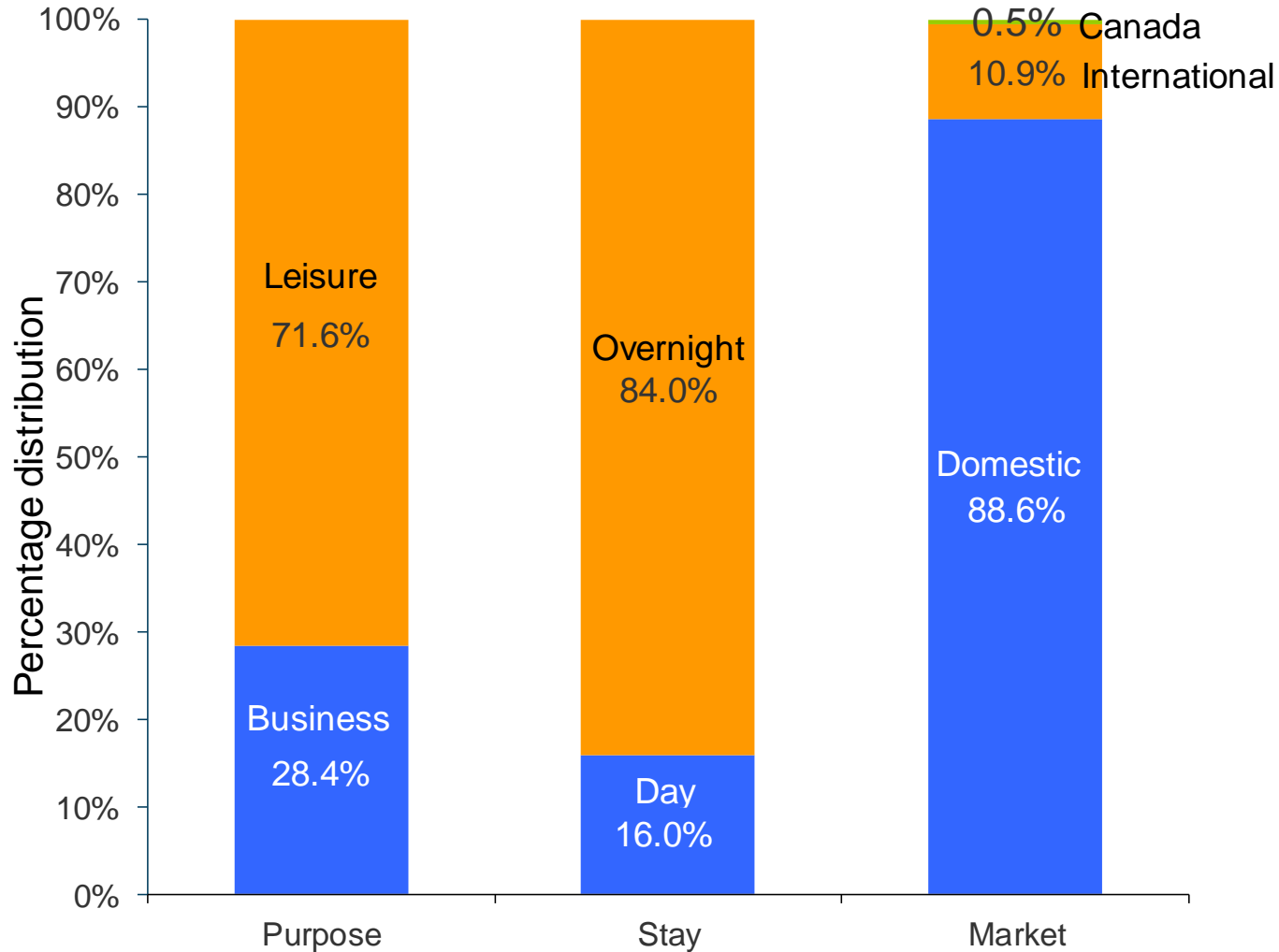
Source: DK Shifflet, Tourism Economics, NTTO

Tourism industry sales by market segment

- Leisure tourism represents 71.6% of visitor spending in MD.
- Overnight visitors spent \$14.2 billion, or 84% of the total.
- Visitor spending growth was led by domestic visitors.
- Canadian visitor spending fell in 2015, following the national trend.

Tourism Industry Sales in 2015					
(US\$ Million)					
Purpose		Stay		Market	
Business	\$ 4,804.8	Day	\$ 2,703.7	Domestic	\$ 14,998.7
Leisure	\$ 12,120.4	Overnight	\$ 14,221.5	Overseas	\$ 1,849.0
				Canada	\$ 77.6
TOTAL	\$ 16,925.2		\$ 16,925.2		\$ 16,925.2
Share					
Business	28.4%	Day	16.0%	Domestic	88.6%
Leisure	71.6%	Overnight	84.0%	Overseas	10.9%
				Canada	0.5%
TOTAL	100%		100%		100%
Growth Rate					
Business	0.0%	Day	11.6%	Domestic	10.7%
Leisure	4.7%	Overnight	1.9%	Overseas	2.7%
				Canada	-9.2%
TOTAL	3.3%		3.3%		3.3%

Tourism industry sales by market segment



Tourism capital investment

Tourism Capital Investment							
(Millions of US\$)							
	2009	2010	2011	2012	2013	2014	2015
Construction	\$262.4	\$283.9	\$268.0	\$191.1	\$386.8	\$416.0	\$469.1
Machinery & Equipment	\$525.8	\$545.6	\$604.7	\$636.8	\$654.7	\$696.4	\$719.7
Total	\$788.2	\$829.5	\$872.6	\$827.9	\$1,041.5	\$1,112.4	\$1,188.7

- Nearly \$1.2 billion was invested by the tourism sector last year, including hotels, recreational facilities, and related government capital outlays.
- Investment across all sectors has increased as confidence builds in the overall economy.

Tourism economy sales

- The Tourism Satellite Account looks at a broad range of tourism-related expenditures which reached \$18.3 billion in 2015.

Tourism Satellite Account 2015 Spending by Category (US\$ Million)					
Domestic Visitor	International Visitor	Non-Visitor PCE	Gov't Support	CAPEX	Total
\$14,998.7	\$1,926.5	\$65.2	\$135.9	\$1,188.7	\$18,315.0

- Non-visitor private consumption expenditures (PCE) represent tourism consumer durables such as an RV, boat, or furniture for a vacation home.
- Government support for tourism includes the budgets for the MD Office of Tourism Development and other budget items in broad support of tourism.
- Capital investment (CAPEX) includes construction of hotels and attractions, as well as tourism equipment and infrastructure.

Tourism industry and economy sales

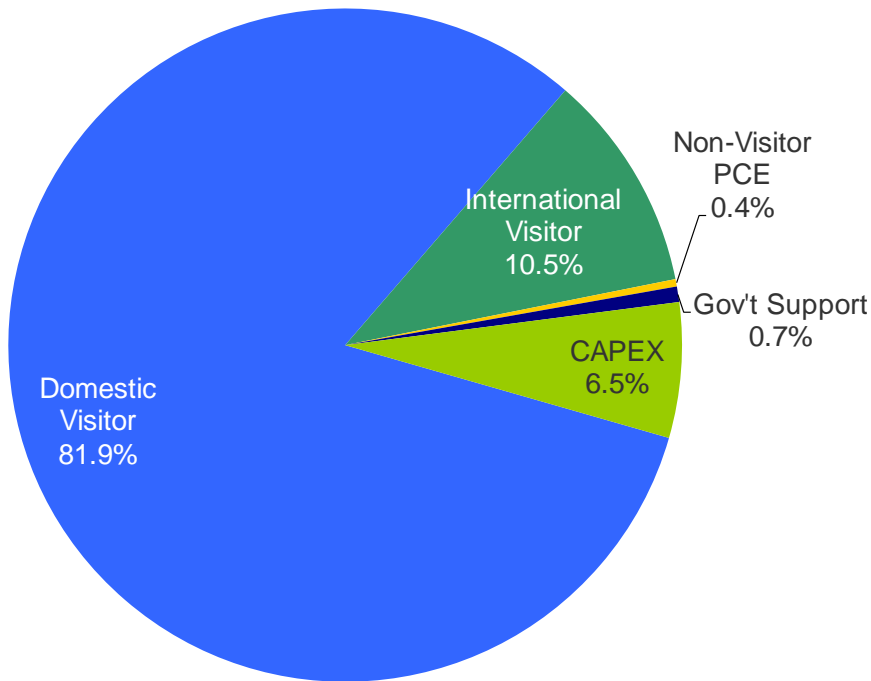
- The direct impact of tourism is driven by tourism industry sales only. This allows for apples-to-apples comparisons with other industries.
- The total economic impact of tourism includes investment in support of tourism, government spending and non-visitor private consumption expenditures (PCE).

Tourism Sales, 2015		
State of Maryland		
Category	Industry	Economy
Lodging	\$3,162.2	\$3,162.2
Food & Beverage	\$3,697.0	\$3,697.0
Recreation	\$2,253.9	\$2,253.9
Shopping	\$2,411.0	\$2,411.0
Air	\$1,691.8	\$1,691.8
Other Transport	\$3,709.2	\$3,709.2
Non-Visitor PCE	\$0.0	\$65.2
Investment	\$0.0	\$1,188.7
Government	\$0.0	\$135.9
Total	\$16,925.2	\$18,315.0

(Data shown in millions)

Tourism economy sales by source

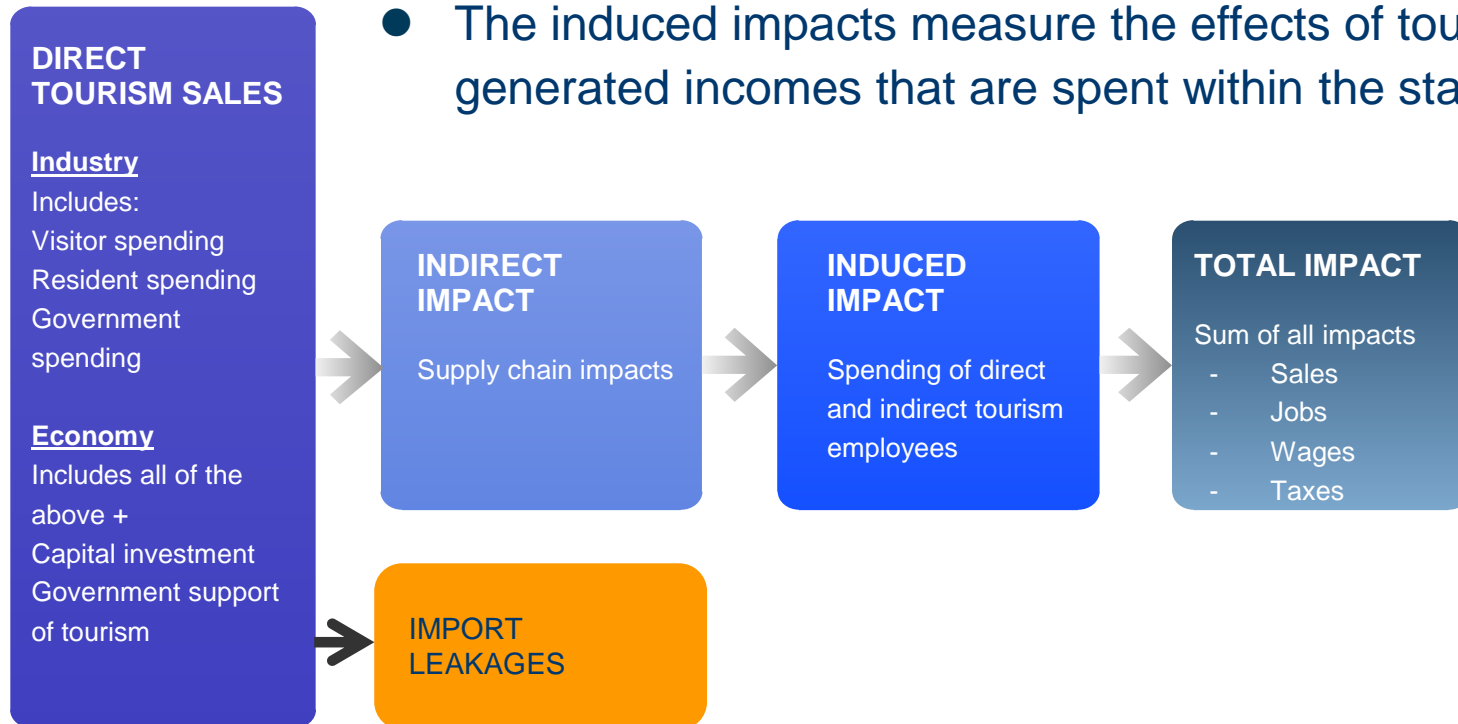
Tourism Economy Sales by Source



- Domestic visitor markets grew in importance in 2015, providing 81.9% of tourism sales in Maryland.
- Capital investment in tourism-related construction and machinery & equipment grew to a 6.5% share of tourism economy sales.

Translating sales into impact

- Direct tourism sales flow through the MD economy, generating GDP, jobs, wages, and taxes.
- The indirect impacts measure supply chain (b2b) activity generated by tourism sales.
- The induced impacts measure the effects of tourism-generated incomes that are spent within the state.

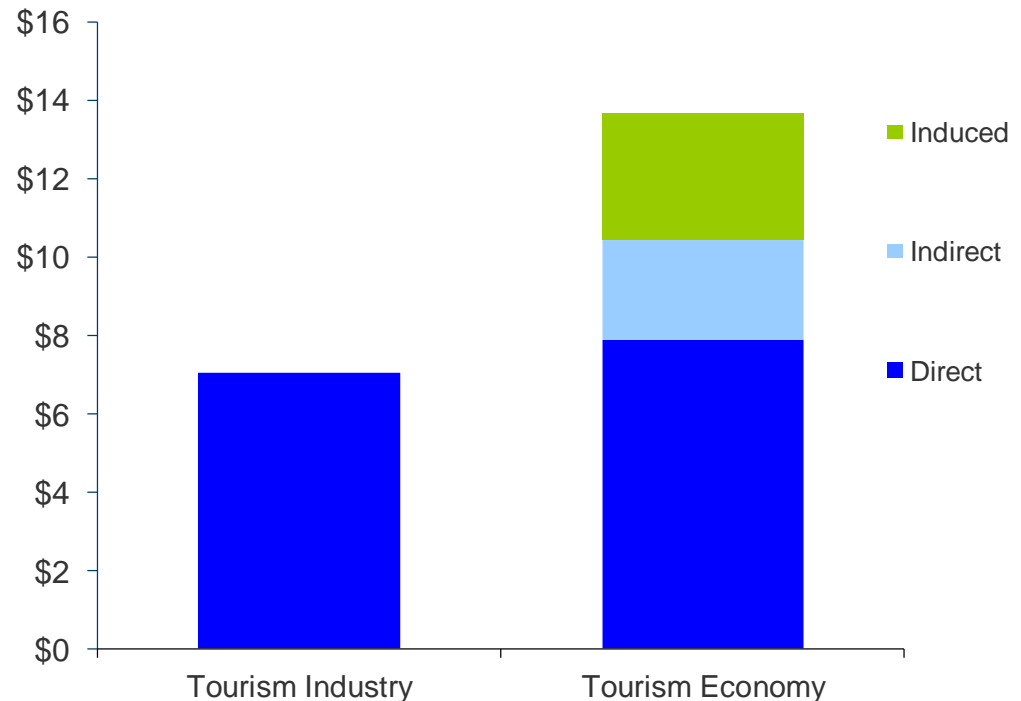


Tourism impact summary

- Tourism industry GDP grew 5.4% in 2015, directly generating \$7.4 billion of Maryland GDP.
- The tourism economy, including direct, indirect and induced impacts, generated GDP of \$14.4 billion. This is 4.0% of the state economy.

Tourism GDP Impact

2015, US\$ Billions



Source: Tourism Economics

State Tourism Industry Impacts (Direct)



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Tourism industry impacts

Tourism Industry Impacts		
	GDP (Millions)	Jobs (Units)
Agriculture, Fishing, Mining	-	-
Construction and Utilities	-	-
Manufacturing	-	-
Wholesale Trade	-	-
Air Transport	\$555.5	3,862
Other Transport	\$860.9	13,188
Retail Trade	\$665.1	13,968
Gasoline Stations	\$242.1	4,133
Communications	-	-
Finance, Insurance and Real Estate	\$406.9	2,687
Business Services	\$93.1	1,032
Education and Health Care	-	-
Recreation and Entertainment	\$1,012.1	28,208
Lodging	\$1,684.0	25,356
Food & Beverage	\$1,804.7	48,729
Personal Services	\$115.0	2,461
Government	-	-
TOTAL	\$7,439.4	143,625
Growth Rate	5.36%	2.38%

- Tourism GDP is the value added of those sectors directly interacting with travelers.
- The narrow definition of the tourism industry counts only tourism industry sales, which excludes capital investment and general government support of tourism. This definition is consistent with economic accounts.
- On this basis, tourism industry GDP tallied \$7.4 billion in 2015, and tourism industry employment of 143,625, or 4.0% of total Maryland employment.

Why sales and GDP differ

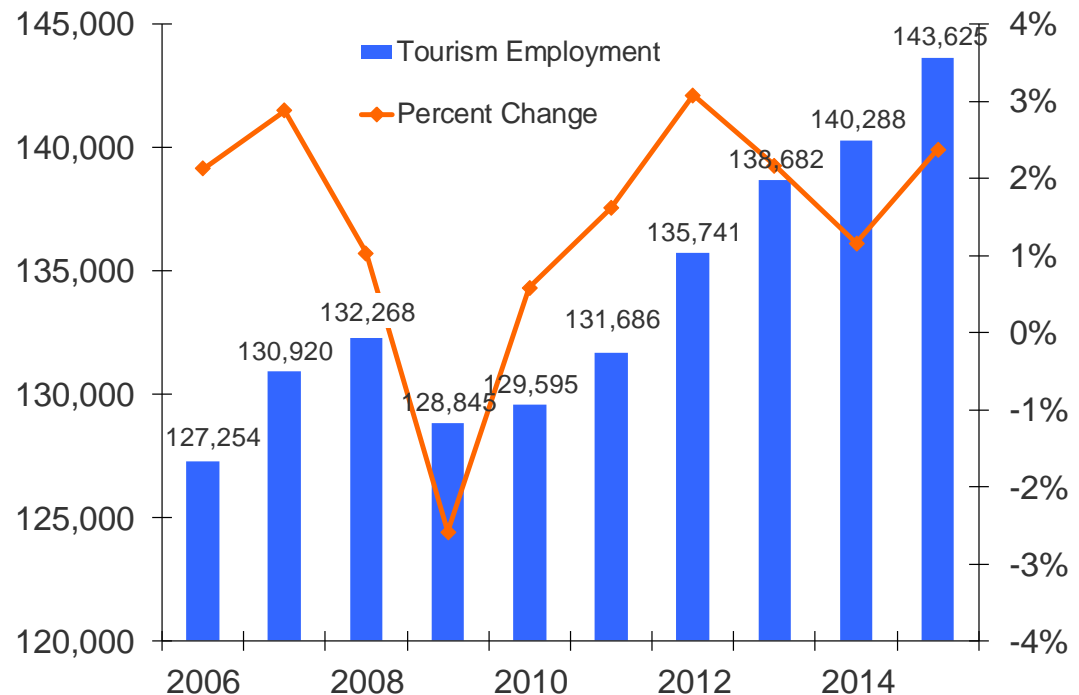
- Tourism industry sales in Maryland equals \$16.9 billion while GDP measures \$7.4 billion
- GDP (Gross domestic product) is less than sales because it measures only the locally-produced value of goods and services consumed by visitors
 - This includes the local labor, capital depreciation, and the profits of tourism-related companies that are based in Maryland
 - The costs of imported goods (gasoline, food or retail goods) that come from out-of-state are excluded from the GDP calculation
 - In addition, business profits from out-of-state companies are also excluded. For example, Wal-Mart profits leave the state.

Tourism employment growth outpaces state

Tourism Employment

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Tourism Employment	127,254	130,920	132,268	128,845	129,595	131,686	135,741	138,682	140,288	143,625
Percent Change	2.1%	2.9%	1.0%	-2.6%	0.6%	1.6%	3.1%	2.2%	1.2%	2.4%

- With continued growth in both visitation and sales, tourism businesses hired in 2015. Tourism employment grew 2.4%.
- Tourism job growth outpaced broader job growth; total MD employment grew 1.8% in 2015.



Ranking tourism employment

- The direct employment contribution of the tourism industry tallied 143,625 in 2015. This narrow measurement of tourism includes only those jobs directly supported by visitor activity and allows for inter-industry ranking.
- On this basis, tourism is the 12th largest employer in the State of Maryland.

Employment Ranking State of Maryland		
Rank	Industry	2015
1	Health care and social assistance	430,766
2	Professional, scientific, and technical services	350,817
3	Retail trade	349,701
4	Local government	244,438
5	Accommodation and food services	242,322
6	Administrative and waste management services	233,930
7	Construction	226,303
8	Other services, except public administration	216,125
9	Real estate and rental and leasing	180,392
10	Federal, civilian	173,183
11	Finance and insurance	160,095
12	Tourism	143,625
13	Transportation and warehousing	114,527
14	Manufacturing	114,486
15	Educational services	104,338

Ranking tourism employment to private sector

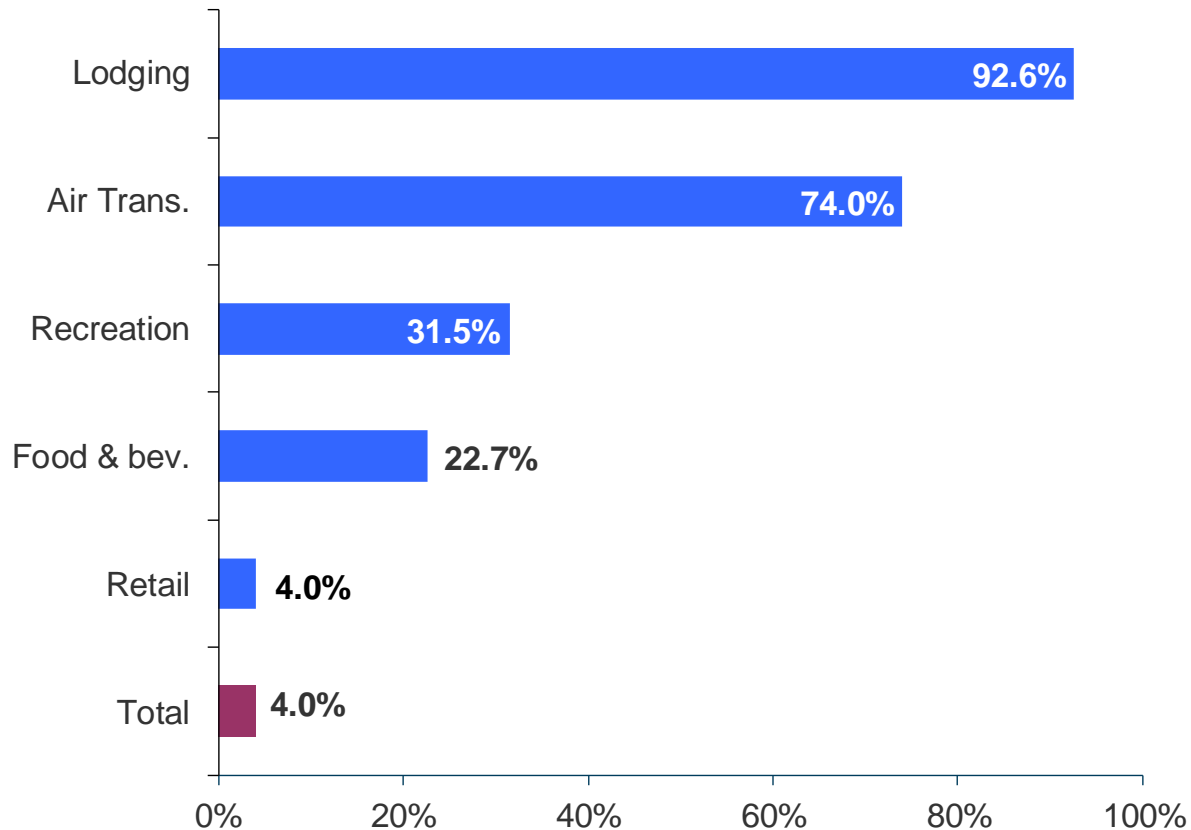
- Examining the tourism industry against other *private sector* industries, tourism is the 10th largest employer in the State of Maryland.

Employment Ranking - Private Sector		
State of Maryland		
Rank	Industry	2015
1	Health care and social assistance	430,766
2	Professional, scientific, and technical services	350,817
3	Retail trade	349,701
4	Accommodation and food services	242,322
5	Administrative and waste management services	233,930
6	Construction	226,303
7	Other services, except public administration	216,125
8	Real estate and rental and leasing	180,392
9	Finance and insurance	160,095
10	Tourism	143,625
11	Transportation and warehousing	114,527
12	Manufacturing	114,486
13	Educational services	104,338
14	Wholesale trade	100,227
15	Arts, entertainment, and recreation	89,578

Tourism employment intensity

- Tourism is a significant part of several industries, representing 93% of lodging, 74% of air transport, 32% of recreation, and 23% of F&B.

Tourism Employment Intensity by Industry



State Tourism Economy Impacts

(direct, indirect, and induced)



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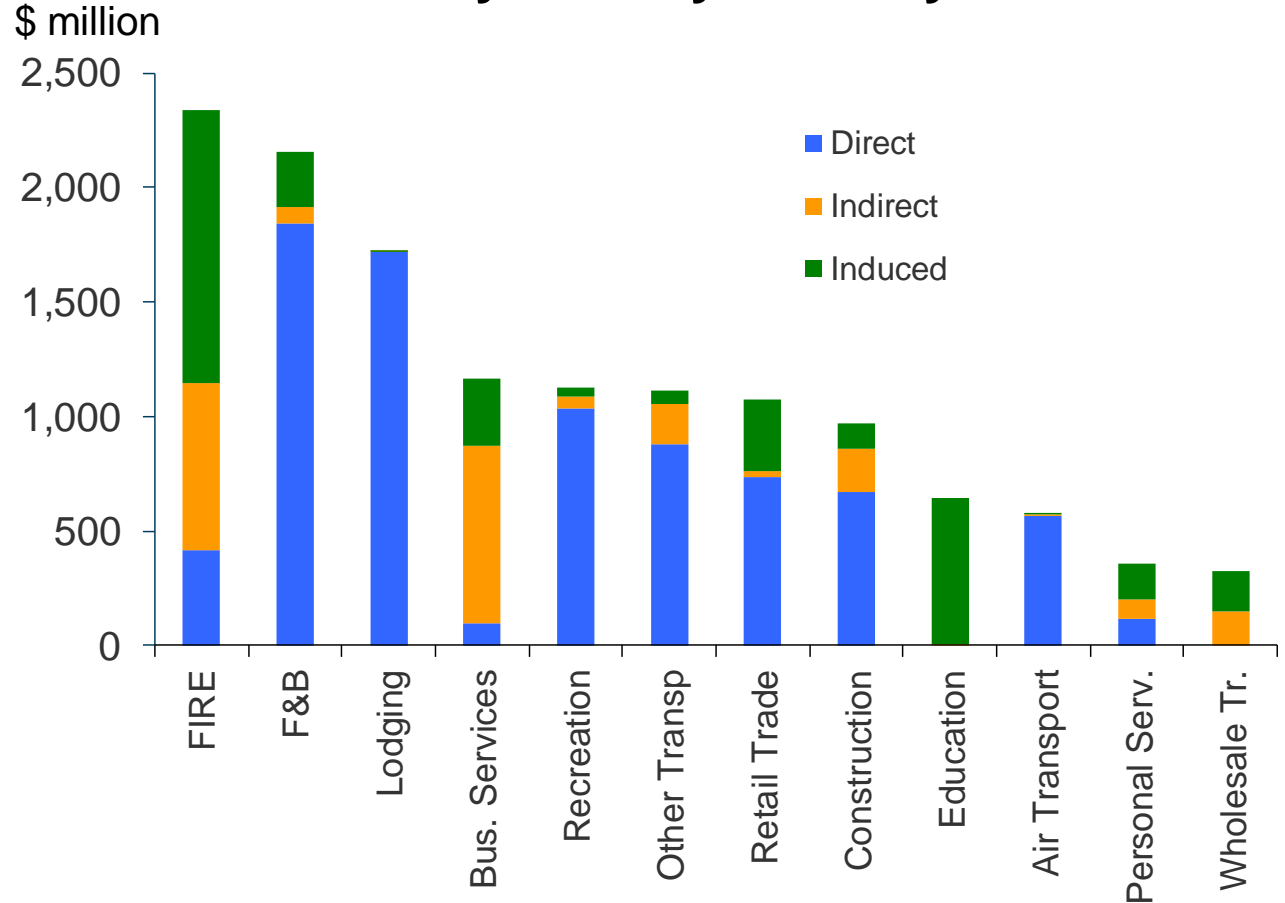
Tourism economy GDP– total impact

Tourism Economy GDP Impact				
(US\$ Million)				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	3.7	2.4	6.1
Construction and Utilities	667.0	193.0	107.8	967.8
Manufacturing	3.4	79.0	40.2	122.6
Wholesale Trade	-	148.9	173.3	322.1
Air Transport	566.8	4.3	7.7	578.8
Other Transport	878.4	179.3	53.5	1,111.2
Retail Trade	733.8	29.6	310.7	1,074.1
Gasoline Stations	247.0	1.2	13.7	261.9
Communications	-	208.6	109.5	318.1
Finance, Insurance and Real Estate	415.2	732.6	1,188.2	2,335.9
Business Services	95.0	779.0	293.9	1,168.0
Education and Health Care	-	4.7	642.7	647.4
Recreation and Entertainment	1,032.7	54.6	40.7	1,127.9
Lodging	1,718.3	2.5	2.5	1,723.2
Food & Beverage	1,841.3	75.8	239.0	2,156.1
Personal Services	117.3	86.3	152.1	355.7
Government	28.2	86.6	35.1	149.9
TOTAL	8,344.4	2,669.6	3,412.9	14,426.8
Pch Change	5.8%	5.2%	5.2%	5.6%

Tourism economy GDP– total impact

- All sectors of the Maryland economy benefit from tourism activity directly and/or indirectly.

Tourism Economy GDP by Industry



Tourism economy employment – total impact

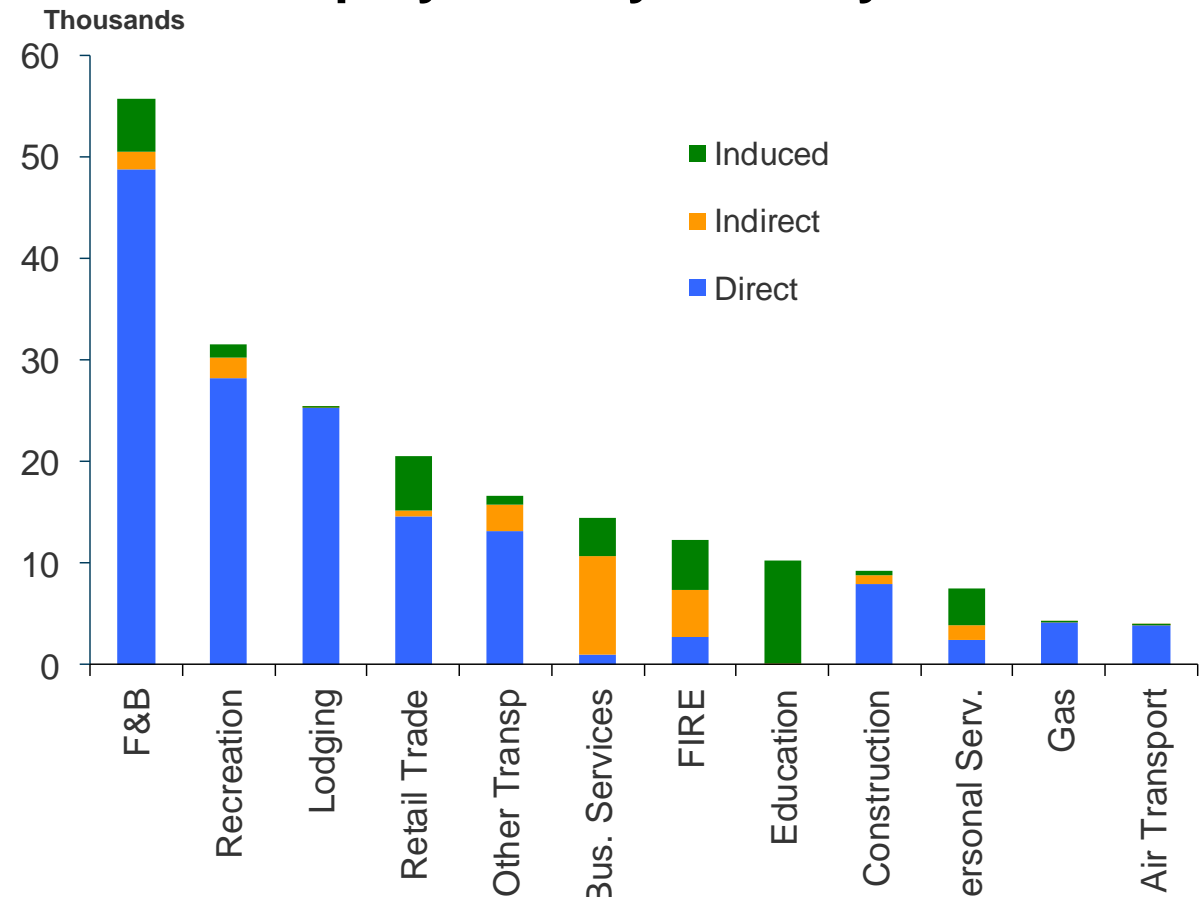
Tourism Economy Employment				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	162	116	278
Construction and Utilities	7,911	855	475	9,241
Manufacturing	41	577	291	909
Wholesale Trade	-	867	1,031	1,898
Air Transport	3,862	28	52	3,942
Other Transport	13,188	2,589	863	16,639
Retail Trade	14,659	503	5,332	20,494
Gasoline Stations	4,133	20	227	4,380
Communications	-	1,113	527	1,640
Finance, Insurance and Real Estate	2,687	4,710	4,944	12,341
Business Services	1,032	9,705	3,782	14,519
Education and Health Care	-	104	10,088	10,192
Recreation and Entertainment	28,208	2,009	1,267	31,484
Lodging	25,356	35	35	25,426
Food & Beverage	48,729	1,853	5,228	55,809
Personal Services	2,461	1,460	3,521	7,443
Government	379	1,047	467	1,892
TOTAL	152,646	27,636	38,246	218,528
Growth Rate	2.3%	1.8%	1.9%	2.2%

- The tourism sector directly and indirectly supported 218,528 jobs, or 6.1% of all employment in Maryland last year.

Tourism economy employment – total impact

- The restaurant, lodging, and retail sectors employed the most persons in the tourism sector.
- Secondary benefits are realized across the entire economy through the supply chain and incomes as they are spent.

Tourism Employment by Industry



Tourism economy income – total impact

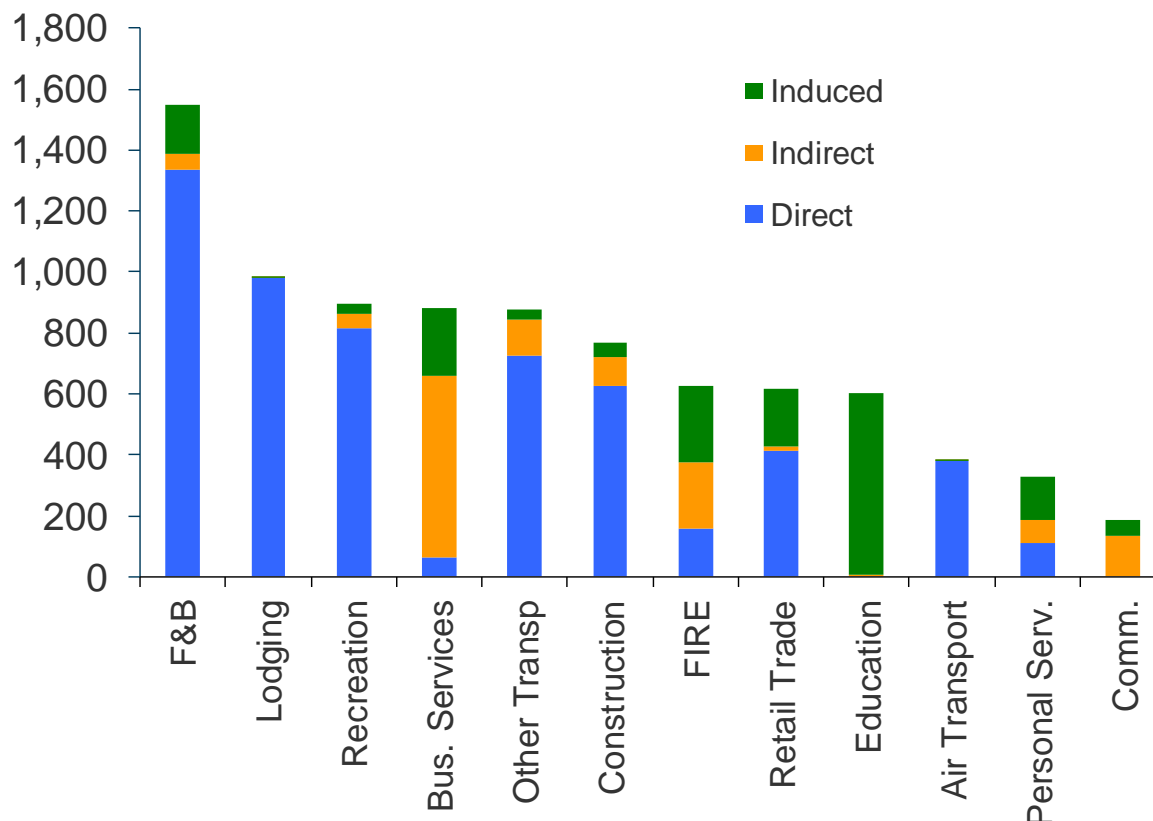
Tourism Labor Income (Compensation)				
(US\$ Million)				
	Direct	Indirect	Induced	Total
Agriculture, Fishing, Mining	-	4.1	3.1	7.2
Construction and Utilities	628.1	90.2	49.6	768.0
Manufacturing	2.4	43.3	21.6	67.3
Wholesale Trade	-	83.0	97.1	180.1
Air Transport	378.7	2.7	5.0	386.5
Other Transport	724.0	118.7	34.5	877.2
Retail Trade	410.9	18.1	186.1	615.1
Gasoline Stations	143.3	0.7	8.0	152.1
Communications	-	134.7	52.8	187.5
Finance, Insurance and Real Estate	158.4	218.9	249.9	627.3
Business Services	63.6	595.2	224.9	883.7
Education and Health Care	-	3.8	598.7	602.5
Recreation and Entertainment	813.4	49.6	33.2	896.2
Lodging	980.8	1.3	1.4	983.6
Food & Beverage	1,337.2	52.1	158.5	1,547.8
Personal Services	108.6	76.1	143.7	328.5
Government	25.1	93.1	38.1	156.3
TOTAL	5,774.8	1,585.7	1,906.4	9,266.8
Pch Change	6.0%	5.0%	5.5%	5.7%

Tourism economy income – total impact

- Employees in the food & beverage industry earned \$1.5 billion through tourism in 2015.
- Of the \$884 million in tourism-driven income in business services, \$595 million was a result of this industry supplying services to tourism businesses (indirect impacts).

Tourism Labor Income by Industry

\$ million



Tourism economy tax generation

- Taxes of \$4.2 billion were directly and indirectly generated by tourism in 2015.
- State and local taxes alone tallied \$2.3 billion.
- Each household in Maryland would need to be taxed an additional \$1,040 per year to replace the tourism taxes received by state and local governments.
- Each visitor adds \$55 to state and local coffers.

Traveler Generated Taxes

Tax Type	2011	2012	2013	2014	2015	Pch Chnge
	Millions of \$					
Federal Taxes Subtotal	<u>1,633.2</u>	<u>1,704.8</u>	<u>1,772.5</u>	<u>1,865.5</u>	<u>1,967.0</u>	<u>5.4%</u>
Corporate	113.0	118.6	123.1	129.2	136.4	5.6%
Indirect Business	166.9	173.7	181.8	188.5	193.9	2.9%
Personal Income	524.2	547.1	568.5	599.5	634.0	5.7%
Social Security	829.1	865.4	899.1	948.3	1,002.7	5.7%
State and Local Taxes Subtotal	<u>1,953.3</u>	<u>2,022.2</u>	<u>2,078.8</u>	<u>2,187.3</u>	<u>2,271.8</u>	<u>3.9%</u>
Corporate	176.2	184.9	191.9	201.5	212.7	5.6%
Personal Income	205.0	214.0	222.3	234.5	248.0	5.7%
Sales	818.6	853.5	886.2	939.7	971.8	3.4%
Lodging	<u>122.0</u>	<u>128.0</u>	<u>126.9</u>	<u>133.4</u>	<u>141.3</u>	<u>5.9%</u>
Local	122.0	128.0	126.9	133.4	141.3	5.9%
Property	389.6	389.6	389.6	400.6	410.4	2.4%
Excise and Fees	223.2	232.7	241.6	256.2	265.0	3.4%
State Unemployment	18.7	19.5	20.3	21.4	22.6	5.7%
TOTAL	<u>3,586.5</u>	<u>3,727.0</u>	<u>3,851.3</u>	<u>4,052.9</u>	<u>4,238.8</u>	<u>4.6%</u>

County Results



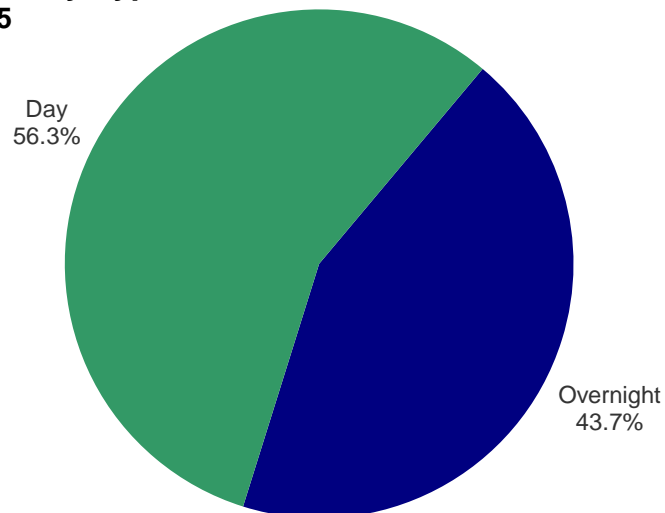
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Maryland Visitors

Maryland				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	22,736.3	29,261.8	51,998.0	4.8%
2014	21,676.1	27,949.5	49,625.6	4.1%
2013	20,656.3	27,024.9	47,681.2	4.9%
2012	20,061.5	25,375.3	45,436.9	4.3%
2011	19,112.3	24,445.6	43,557.9	3.7%

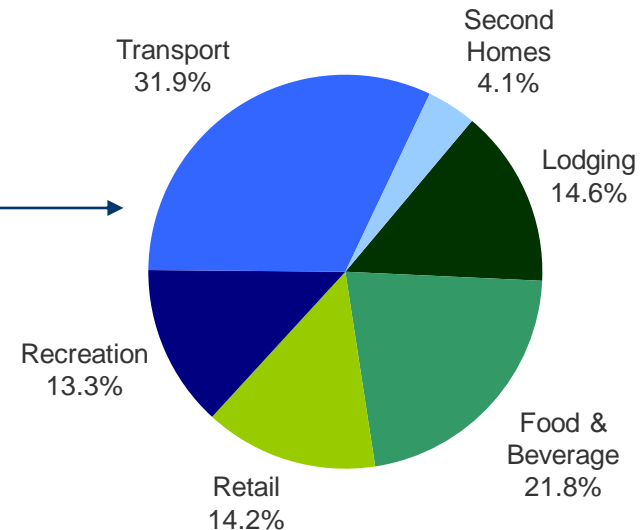
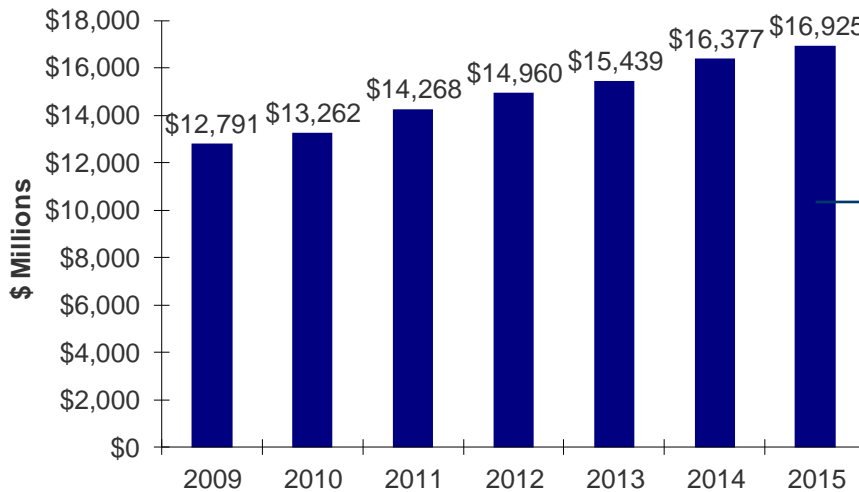
Visits by Type
2015



Maryland Industry Sales

Maryland								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$2,474.5	\$3,697.0	\$2,411.0	\$2,253.9	\$5,401.0	\$687.7	\$16,925.2	3.3%
2014	\$2,379.5	\$3,479.6	\$2,435.6	\$2,163.1	\$5,259.2	\$659.8	\$16,376.9	6.1%
2013	\$2,222.7	\$3,234.7	\$2,303.7	\$2,014.7	\$5,021.8	\$641.5	\$15,439.2	3.2%
2012	\$2,250.8	\$3,079.3	\$2,205.1	\$1,907.6	\$4,879.5	\$637.8	\$14,960.1	4.8%
2011	\$2,134.0	\$2,874.2	\$2,086.8	\$1,863.1	\$4,722.9	\$587.2	\$14,268.2	7.6%

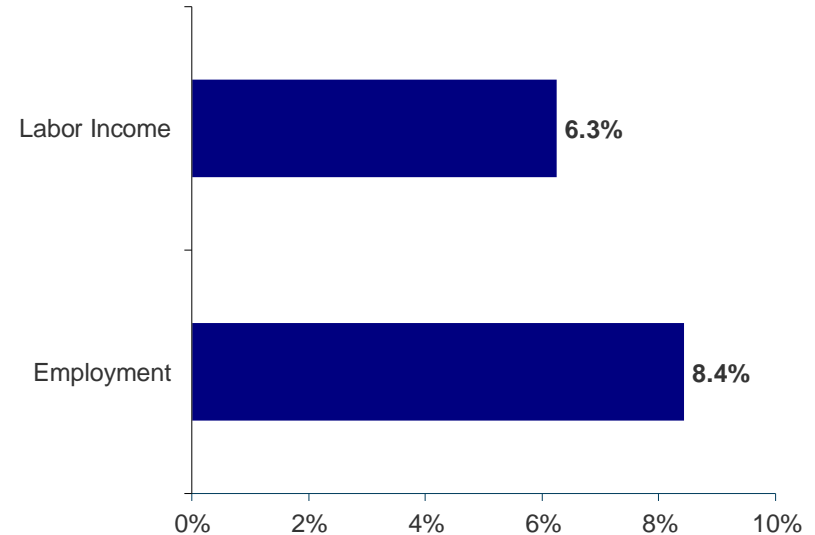
Tourism Industry Sales



Maryland Tourism Impact

Maryland				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	143,625	218,528	100.00%	
2014	140,097	213,813	100.00%	
2013	138,682	211,330	100.00%	
2012	135,741	206,480	100.00%	
2011	131,686	200,677	100.00%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$5,119.2	\$9,266.8	100.00%	
2014	\$4,859.4	\$8,763.6	100.00%	
2013	\$4,633.4	\$8,309.3	100.00%	
2012	\$4,494.3	\$7,997.4	100.00%	
2011	\$4,295.3	\$7,662.1	100.00%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$2,061.0	\$2,272.3	\$141.85	\$4,333.3
2014	\$1,950.2	\$2,185.6	\$131.67	\$4,135.7
2013	\$1,829.8	\$2,080.2	\$128.12	\$3,910.0
2012	\$1,767.6	\$2,027.2	\$127.98	\$3,794.8
2011	\$1,685.0	\$1,955.3	\$121.95	\$3,640.4

Tourism Share of County Economy

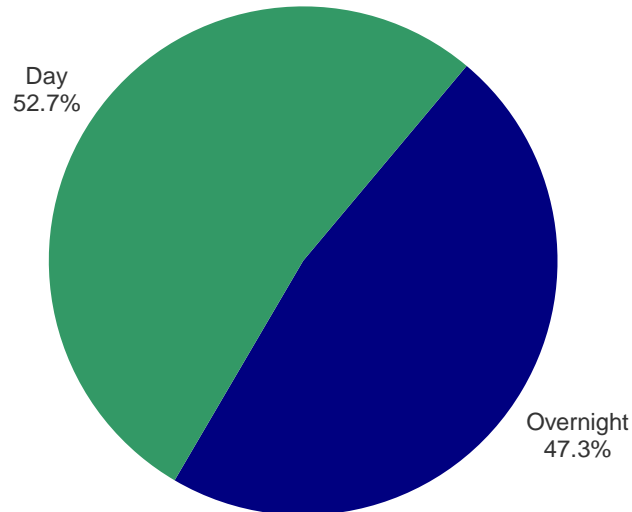


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$16,925.2	\$18,283.5
\$16,376.9	\$17,679.6
\$15,439.2	\$16,429.5
\$14,960.1	\$16,101.8
\$14,268.2	\$15,313.2

Allegheny County, Visitors

Allegheny County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	283.4	315.5	598.9	0.8%
2014	285.5	308.6	594.1	4.7%
2013	267.3	300.0	567.3	11.1%
2012	247.2	263.2	510.4	4.6%
2011	234.1	253.8	487.8	1.6%

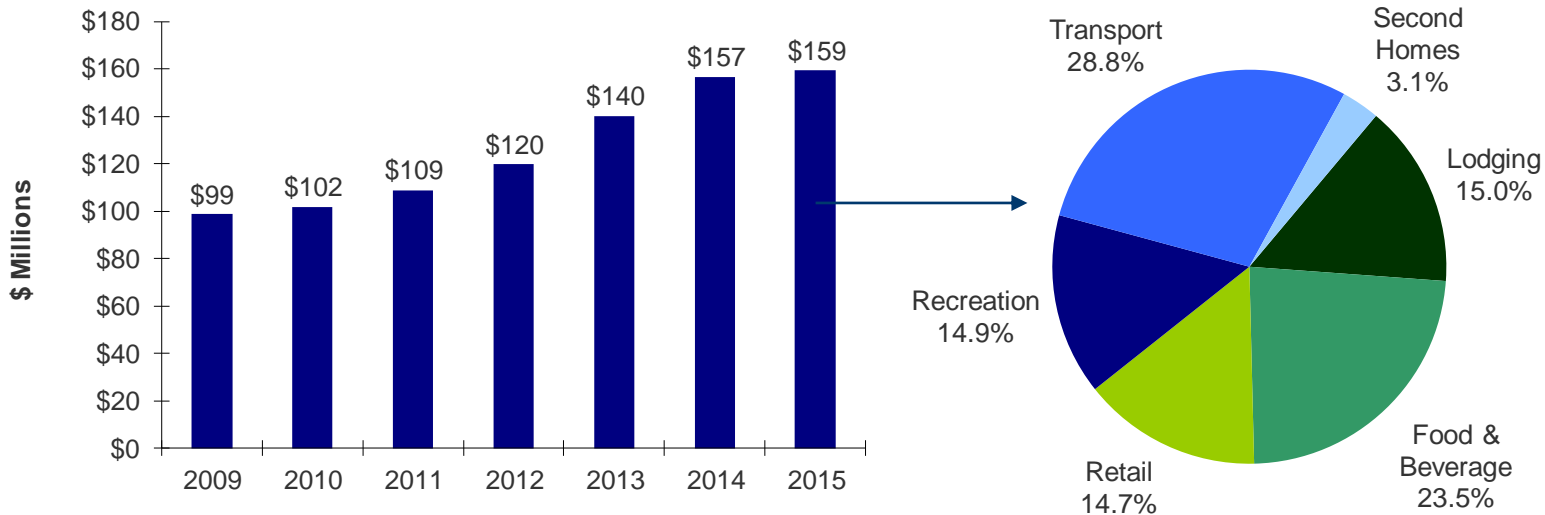
Visits by Type
2015



Allegheny County, Industry Sales

Allegheny County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$24.0	\$37.3	\$23.4	\$23.7	\$45.8	\$5.0	\$159.2	1.8%
2014	\$23.0	\$36.1	\$23.8	\$23.3	\$45.4	\$4.8	\$156.5	11.8%
2013	\$20.7	\$33.9	\$21.2	\$17.3	\$42.1	\$4.8	\$140.0	16.9%
2012	\$17.9	\$29.1	\$17.4	\$13.9	\$37.1	\$4.3	\$119.7	10.0%
2011	\$16.3	\$27.0	\$15.8	\$12.0	\$34.4	\$3.4	\$108.9	6.9%

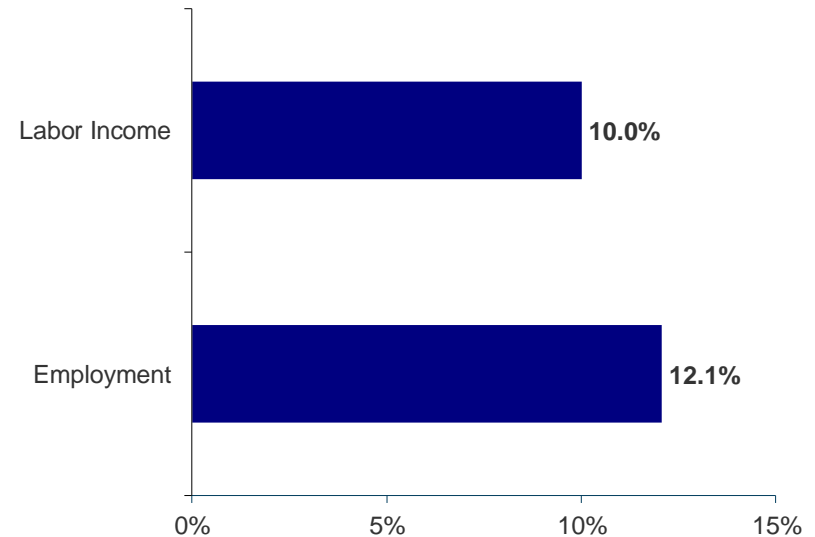
Tourism Industry Sales



Allegheny County, Tourism Impact

Allegheny County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	2,389	3,497	1.60%	
2014	2,403	3,515	1.64%	
2013	2,121	3,142	1.49%	
2012	1,784	2,691	1.30%	
2011	1,753	2,647	1.32%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$57.8	\$106.8	1.15%	
2014	\$56.4	\$103.4	1.18%	
2013	\$49.5	\$91.4	1.10%	
2012	\$38.1	\$73.1	0.91%	
2011	\$36.4	\$69.9	0.91%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$23.0	\$22.4	\$1.27	\$45.5
2014	\$22.3	\$22.2	\$1.37	\$44.5
2013	\$19.5	\$20.1	\$1.27	\$39.7
2012	\$15.8	\$17.3	\$1.10	\$33.1
2011	\$15.0	\$16.1	\$0.99	\$31.1

Tourism Share of County Economy

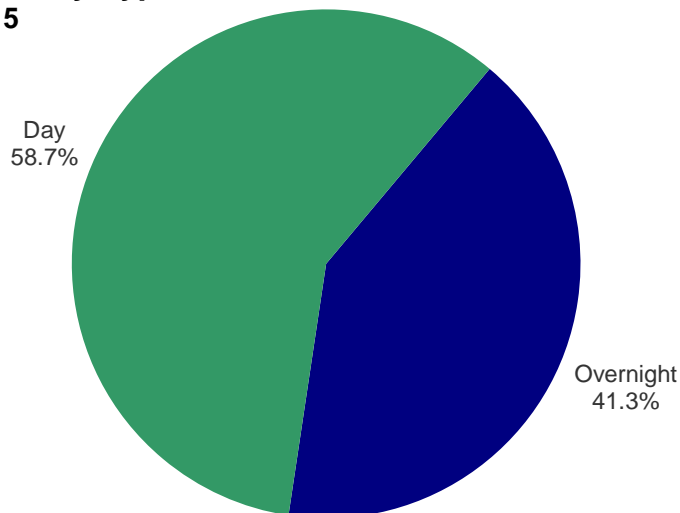


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$159.2	\$172.0
\$156.5	\$169.0
\$140.0	\$148.9
\$119.7	\$128.9
\$108.9	\$116.9

Anne Arundel County, Visitors

Anne Arundel County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	2,880.1	4,101.2	6,981.3	3.7%
2014	2,783.2	3,948.6	6,731.8	5.6%
2013	2,628.8	3,748.4	6,377.2	8.0%
2012	2,551.8	3,353.3	5,905.1	6.2%
2011	2,426.6	3,133.6	5,560.2	-0.8%

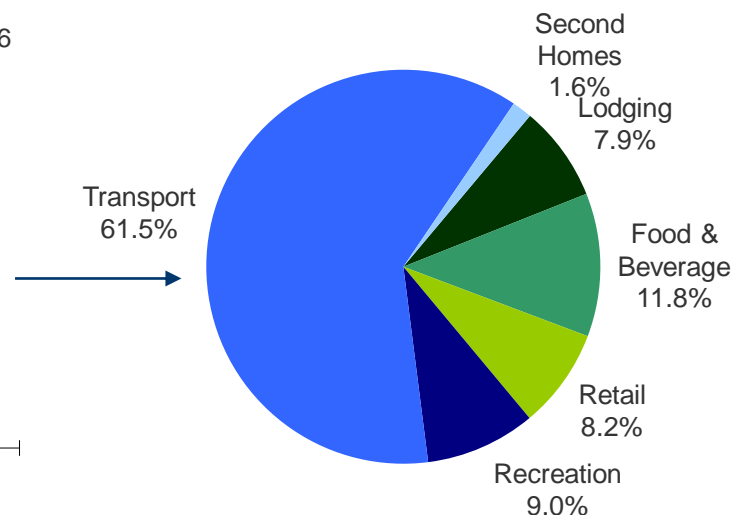
Visits by Type
2015



Anne Arundel County, Industry Sales

Anne Arundel County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$287.3	\$430.1	\$300.0	\$330.8	\$2,247.7	\$60.0	\$3,655.8	3.0%
2014	\$279.0	\$408.0	\$301.0	\$321.9	\$2,180.7	\$59.2	\$3,549.9	5.4%
2013	\$256.5	\$374.6	\$281.1	\$296.1	\$2,100.3	\$57.8	\$3,366.4	2.4%
2012	\$271.4	\$367.2	\$272.3	\$270.2	\$2,047.3	\$58.8	\$3,287.3	3.6%
2011	\$251.6	\$335.8	\$253.0	\$259.4	\$2,020.2	\$54.2	\$3,174.2	7.3%

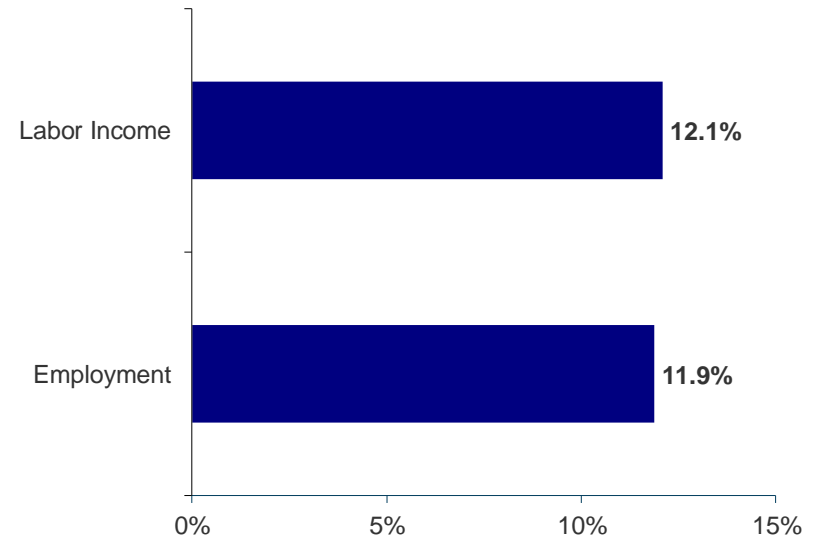
Tourism Industry Sales



Anne Arundel County, Tourism Impact

Anne Arundel County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	21,561	30,940	14.16%	
2014	20,670	29,804	13.94%	
2013	20,386	29,360	13.89%	
2012	19,910	28,630	13.87%	
2011	19,064	27,500	13.70%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$1,055.6	\$1,754.0	18.93%	
2014	\$989.1	\$1,638.9	18.70%	
2013	\$932.3	\$1,537.6	18.50%	
2012	\$876.0	\$1,437.0	17.97%	
2011	\$836.6	\$1,375.9	17.96%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$398.9	\$449.6	\$18.30	\$848.5
2014	\$374.2	\$434.6	\$17.83	\$808.8
2013	\$348.7	\$414.7	\$17.42	\$763.3
2012	\$329.4	\$404.7	\$17.61	\$734.0
2011	\$314.6	\$394.0	\$16.88	\$708.6

Tourism Share of County Economy

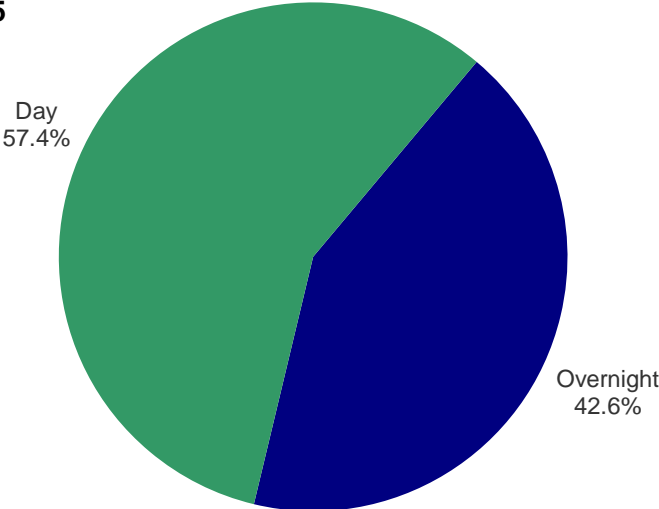


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$3,655.8	\$3,949.2
\$3,549.9	\$3,832.3
\$3,366.4	\$3,582.3
\$3,287.3	\$3,538.2
\$3,174.2	\$3,406.7

Baltimore County, Visitors

Baltimore County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	2,479.2	3,336.1	5,815.3	4.7%
2014	2,365.5	3,186.6	5,552.1	3.4%
2013	2,233.9	3,134.8	5,368.7	3.8%
2012	2,173.5	3,000.5	5,174.0	4.3%
2011	2,054.4	2,906.7	4,961.1	7.9%

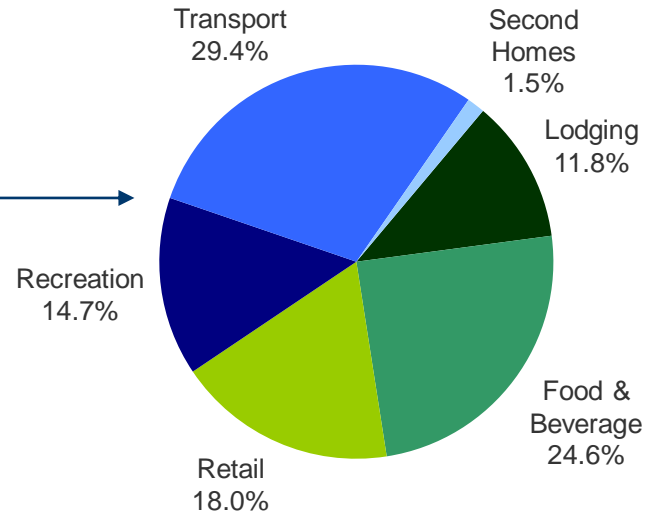
Visits by Type
2015



Baltimore County, Industry Sales

Baltimore County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$147.7	\$309.0	\$226.3	\$183.9	\$368.6	\$18.3	\$1,253.9	3.9%
2014	\$137.3	\$287.6	\$233.2	\$174.5	\$356.5	\$18.0	\$1,207.1	7.3%
2013	\$124.9	\$263.3	\$225.0	\$169.7	\$325.9	\$16.2	\$1,124.9	1.1%
2012	\$127.8	\$254.3	\$221.6	\$166.5	\$325.5	\$17.0	\$1,112.8	5.9%
2011	\$120.2	\$237.4	\$210.6	\$158.1	\$309.0	\$15.9	\$1,051.1	11.4%

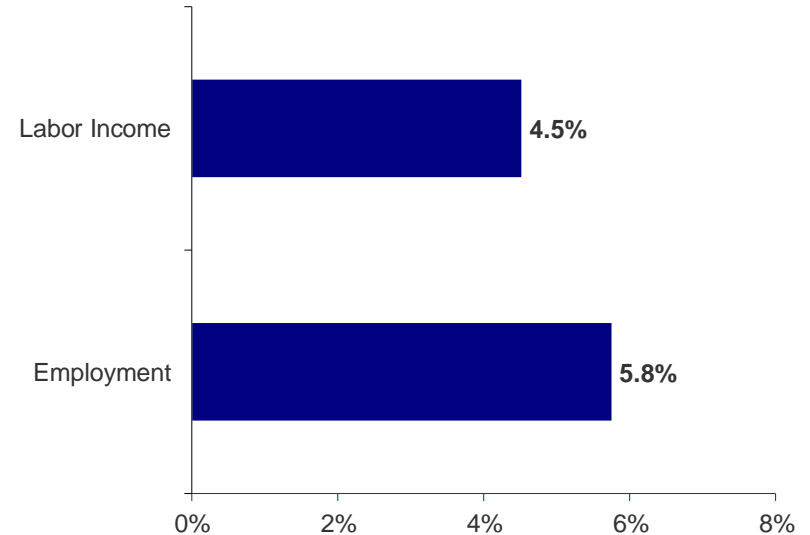
Tourism Industry Sales



Baltimore County, Tourism Impact

Baltimore County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	12,905	21,313	9.75%	
2014	12,491	20,727	9.69%	
2013	12,210	20,285	9.60%	
2012	12,222	20,171	9.77%	
2011	11,847	19,591	9.76%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$444.0	\$876.3	9.46%	
2014	\$422.3	\$830.0	9.47%	
2013	\$393.9	\$773.7	9.31%	
2012	\$391.4	\$758.7	9.49%	
2011	\$373.1	\$725.5	9.47%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$188.1	\$183.0	\$9.63	\$371.1
2014	\$178.0	\$175.4	\$8.90	\$353.5
2013	\$164.2	\$165.2	\$8.45	\$329.4
2012	\$161.7	\$163.7	\$8.49	\$325.4
2011	\$153.7	\$156.4	\$7.62	\$310.0

Tourism Share of County Economy

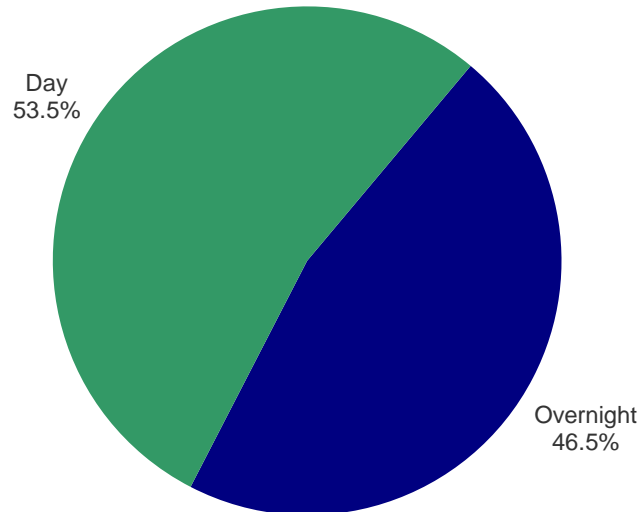


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$1,253.9	\$1,354.5
\$1,207.1	\$1,303.2
\$1,124.9	\$1,197.1
\$1,112.8	\$1,197.8
\$1,051.1	\$1,128.1

Calvert County, Visitors

Calvert County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	278.2	320.5	598.6	8.8%
2014	258.0	292.4	550.3	1.3%
2013	245.9	297.4	543.3	-0.3%
2012	247.2	297.9	545.1	0.9%
2011	241.1	298.9	540.0	2.8%

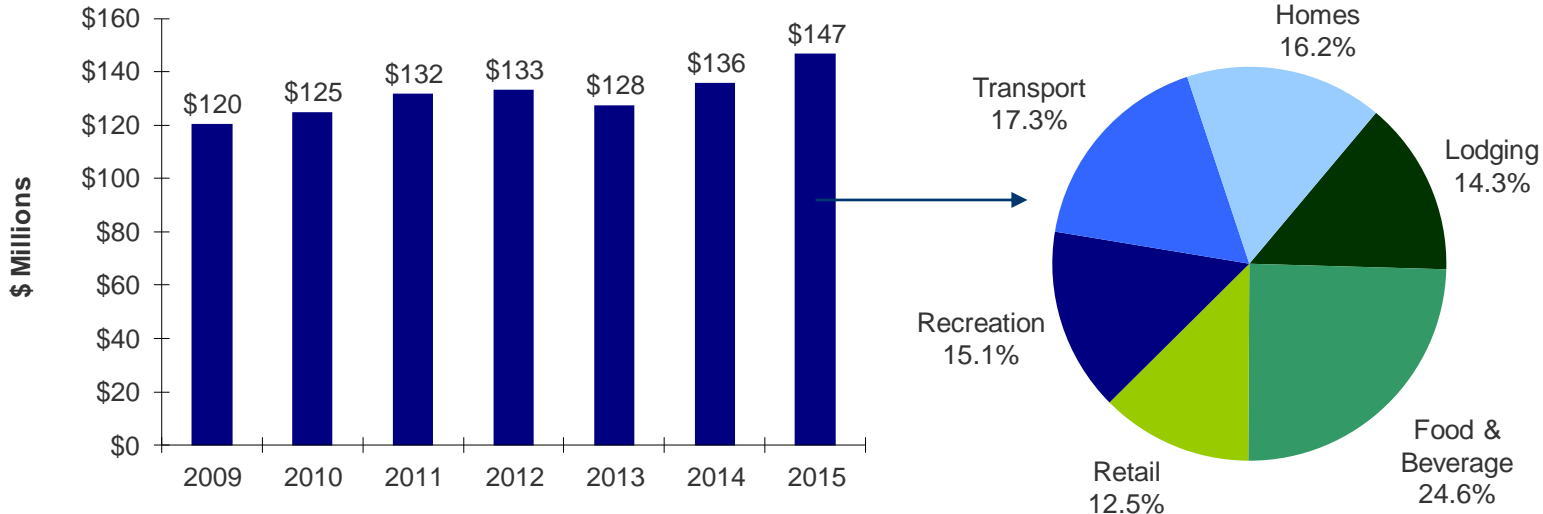
Visits by Type
2015



Calvert County, Industry Sales

Calvert County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$21.0	\$36.2	\$18.3	\$22.1	\$25.4	\$23.8	\$146.8	8.0%
2014	\$18.9	\$32.7	\$17.5	\$19.9	\$22.9	\$23.9	\$135.9	6.6%
2013	\$18.0	\$29.5	\$16.3	\$18.6	\$21.9	\$23.2	\$127.5	-4.4%
2012	\$20.4	\$29.7	\$15.7	\$19.8	\$23.8	\$23.9	\$133.3	1.2%
2011	\$20.9	\$29.6	\$15.3	\$21.2	\$24.6	\$20.1	\$131.7	5.4%

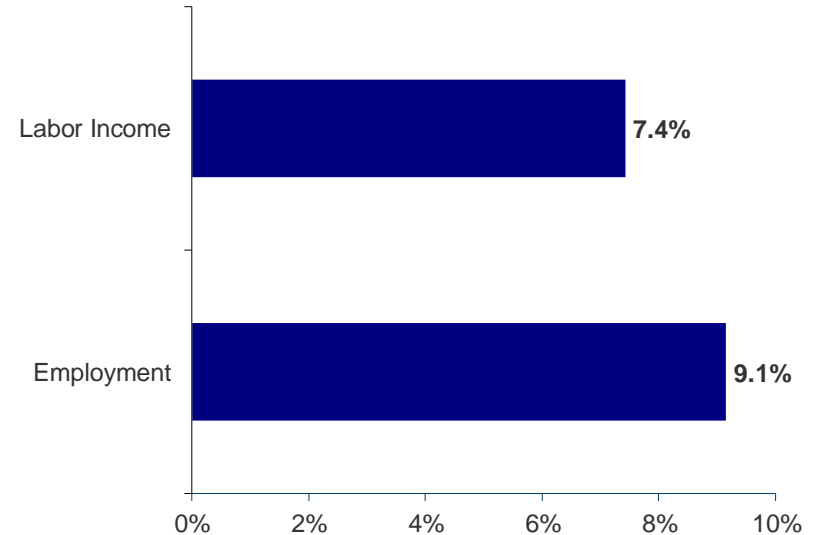
Tourism Industry Sales



Calvert County, Tourism Impact

Calvert County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	1,270	2,071	0.95%	
2014	1,198	1,973	0.92%	
2013	1,164	1,921	0.91%	
2012	1,212	1,972	0.95%	
2011	1,229	1,985	0.99%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$38.0	\$79.7	0.86%	
2014	\$35.1	\$73.9	0.84%	
2013	\$32.5	\$68.6	0.83%	
2012	\$35.3	\$71.7	0.90%	
2011	\$34.9	\$70.6	0.92%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$17.8	\$19.9	\$0.71	\$37.7
2014	\$16.4	\$18.4	\$0.62	\$34.8
2013	\$15.1	\$17.5	\$0.59	\$32.6
2012	\$15.8	\$18.4	\$0.74	\$34.2
2011	\$15.5	\$18.4	\$0.79	\$33.9

Tourism Share of County Economy

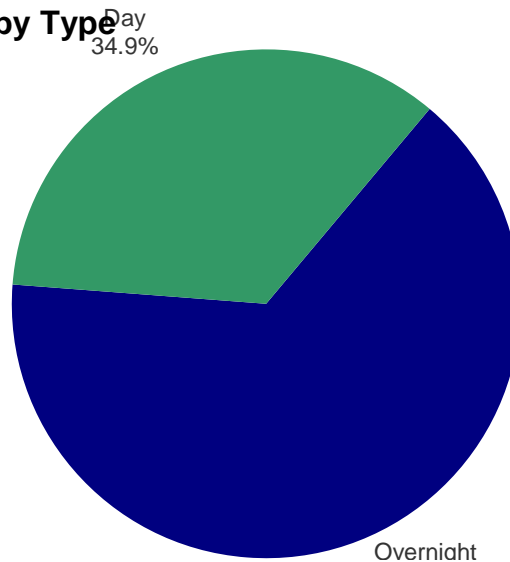


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$146.8	\$158.6
\$135.9	\$146.7
\$127.5	\$135.7
\$133.3	\$143.5
\$131.7	\$141.3

Caroline County, Visitors

Caroline County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	69.6	37.3	106.8	2.9%
2014	67.7	36.2	103.8	0.6%
2013	64.8	38.4	103.3	4.0%
2012	63.4	35.9	99.3	5.3%
2011	62.4	31.8	94.3	10.7%

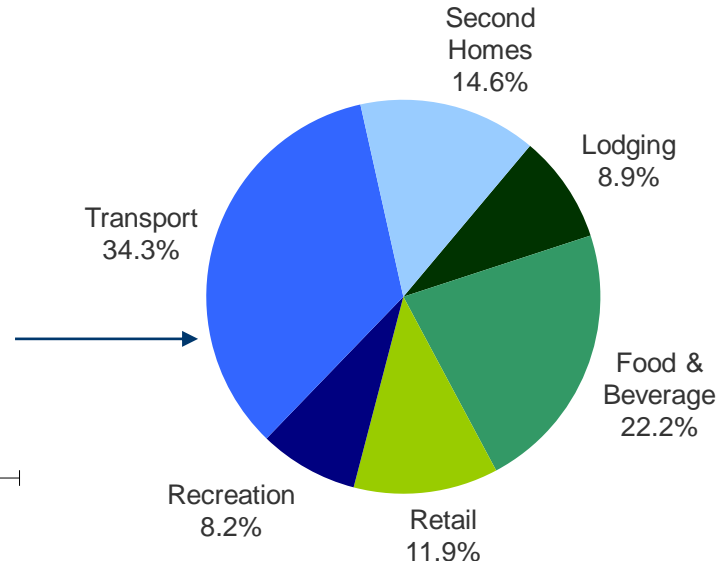
Visits by Type
2015



Caroline County, Industry Sales

Caroline County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$1.3	\$3.4	\$1.8	\$1.2	\$5.2	\$2.2	\$15.1	0.7%
2014	\$1.3	\$3.2	\$1.8	\$1.1	\$5.0	\$2.6	\$15.0	-1.1%
2013	\$1.2	\$3.1	\$1.8	\$1.2	\$4.9	\$2.9	\$15.2	-0.9%
2012	\$1.2	\$3.0	\$1.5	\$1.3	\$4.7	\$3.5	\$15.3	-4.4%
2011	\$1.2	\$3.0	\$1.4	\$1.3	\$4.5	\$4.6	\$16.0	6.9%

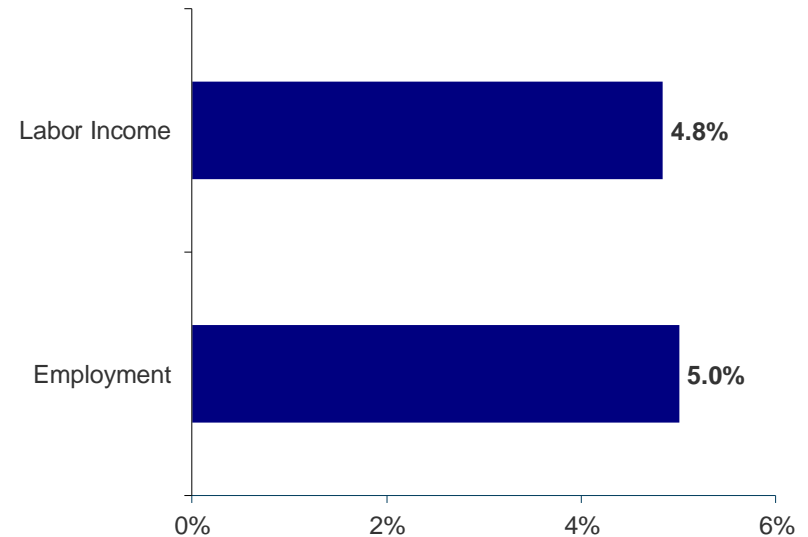
Tourism Industry Sales



Caroline County, Tourism Impact

Caroline County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	226	453	0.21%	
2014	225	449	0.21%	
2013	238	464	0.22%	
2012	234	454	0.22%	
2011	237	454	0.23%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$6.4	\$17.7	0.19%	
2014	\$6.4	\$17.2	0.20%	
2013	\$6.4	\$16.8	0.20%	
2012	\$6.3	\$16.4	0.20%	
2011	\$6.1	\$15.8	0.21%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$3.6	\$2.5	\$0.05	\$6.1
2014	\$3.5	\$2.5	\$0.04	\$6.0
2013	\$3.4	\$2.5	\$0.04	\$5.9
2012	\$3.3	\$2.5	\$0.04	\$5.8
2011	\$3.2	\$2.5	\$0.03	\$5.7

Tourism Share of County Economy

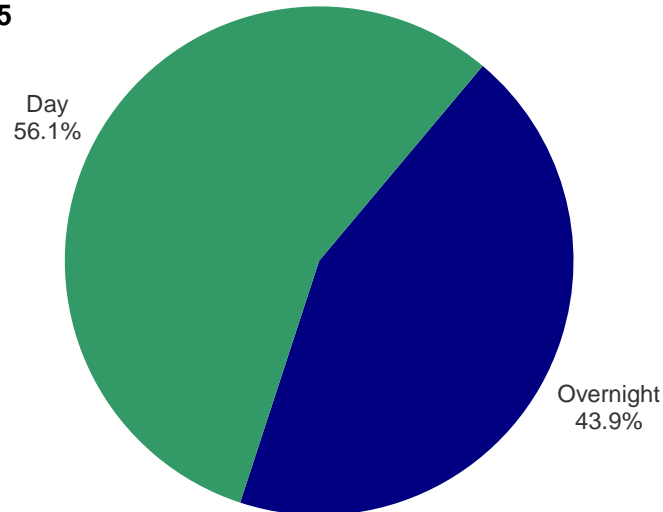


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$15.1	\$16.3
\$15.0	\$16.2
\$15.2	\$16.1
\$15.3	\$16.5
\$16.0	\$17.2

Carroll County, Visitors

Carroll County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	356.9	455.8	812.7	3.8%
2014	345.7	437.0	782.8	3.0%
2013	330.2	429.9	760.1	6.0%
2012	320.5	396.6	717.1	3.1%
2011	308.6	386.7	695.3	10.4%

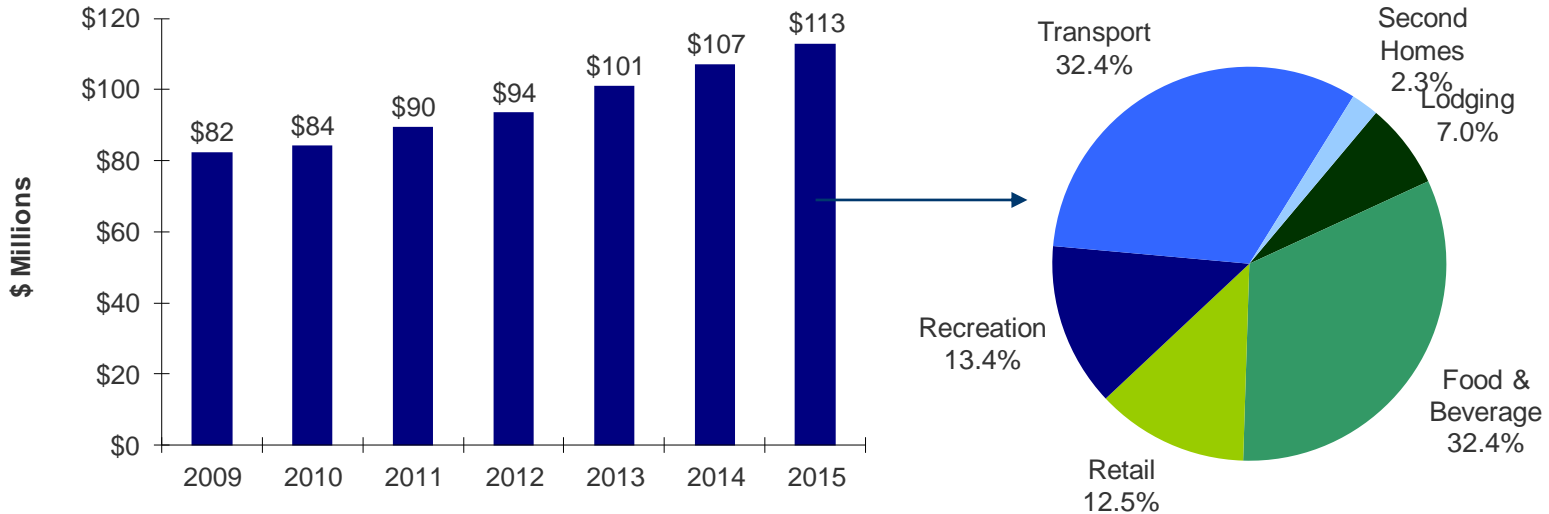
Visits by Type
2015



Carroll County, Industry Sales

Carroll County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$7.9	\$36.6	\$14.1	\$15.2	\$36.6	\$2.6	\$113.0	5.5%
2014	\$7.5	\$34.5	\$14.2	\$14.0	\$34.4	\$2.4	\$107.1	6.0%
2013	\$7.3	\$31.6	\$12.3	\$14.4	\$33.5	\$2.0	\$101.1	8.0%
2012	\$7.0	\$29.7	\$11.0	\$12.6	\$31.8	\$1.5	\$93.6	4.4%
2011	\$6.9	\$27.2	\$11.1	\$12.9	\$30.6	\$0.9	\$89.6	6.4%

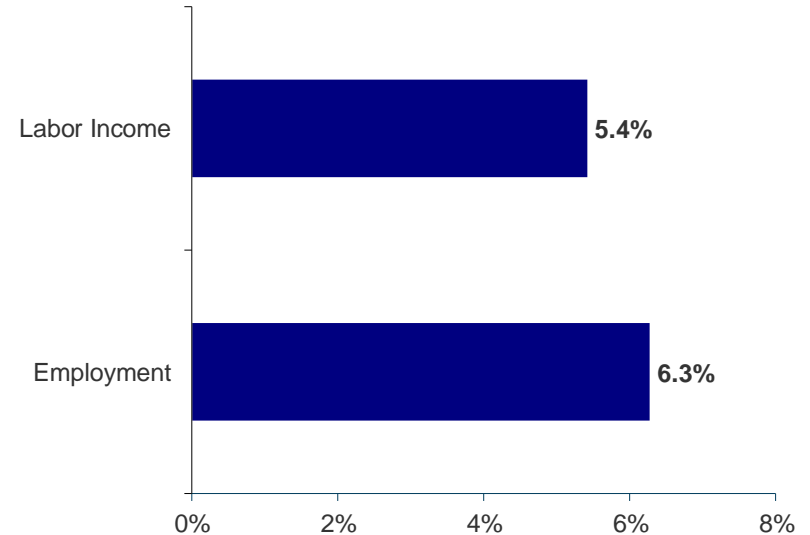
Tourism Industry Sales



Carroll County, Tourism Impact

Carroll County			
Tourism Employment			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	2,082	3,562	1.63%
2014	2,009	3,457	1.62%
2013	1,991	3,420	1.62%
2012	1,889	3,263	1.58%
2011	1,815	3,150	1.57%

Tourism Share of County Economy



Tourism Labor Income, (millions)			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	\$56.6	\$127.0	1.37%
2014	\$53.4	\$119.6	1.36%
2013	\$51.8	\$114.8	1.38%
2012	\$48.4	\$107.6	1.35%
2011	\$45.0	\$101.2	1.32%

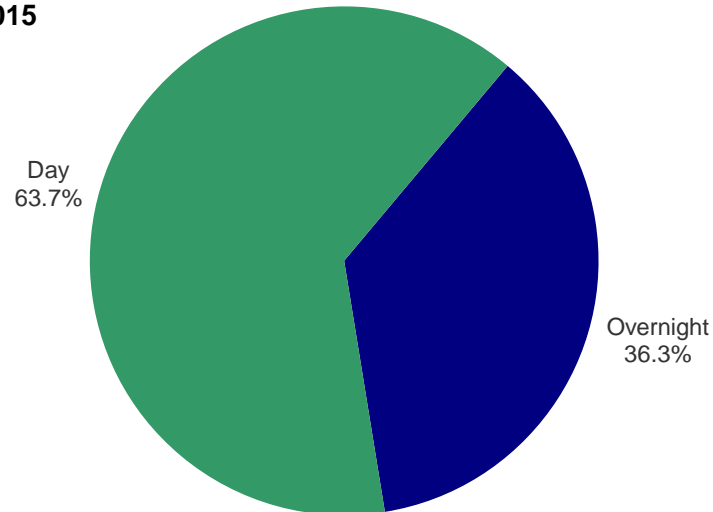
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$25.9	\$18.8	\$0.29	\$44.7
2014	\$24.4	\$17.9	\$0.30	\$42.3
2013	\$23.1	\$17.1	\$0.29	\$40.2
2012	\$21.7	\$16.1	\$0.29	\$37.7
2011	\$20.3	\$15.5	\$0.29	\$35.8

Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$113.0	\$122.0
\$107.1	\$115.6
\$101.1	\$107.5
\$93.6	\$100.7
\$89.6	\$96.1

Cecil County, Visitors

Cecil County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	354.5	621.3	975.8	5.4%
2014	337.7	587.9	925.6	2.9%
2013	318.1	581.7	899.7	6.9%
2012	305.3	536.5	841.8	3.4%
2011	290.0	524.1	814.1	11.3%

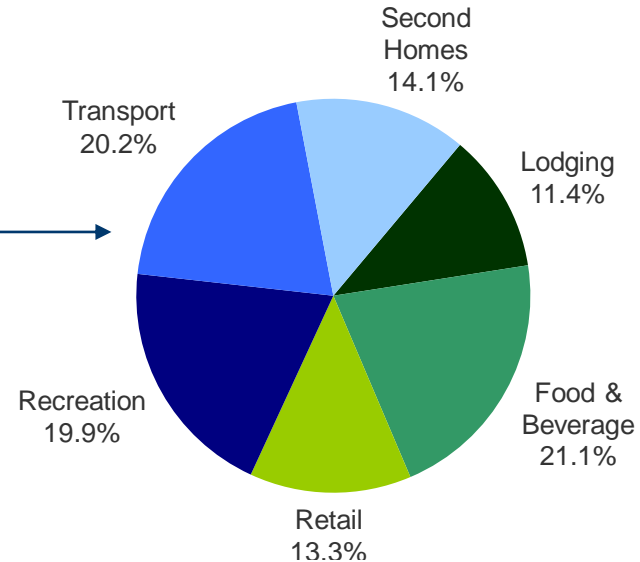
Visits by Type
2015



Cecil County, Industry Sales

Cecil County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$18.8	\$34.6	\$21.8	\$32.7	\$33.2	\$23.2	\$164.3	1.9%
2014	\$18.1	\$32.8	\$22.2	\$33.5	\$32.7	\$22.0	\$161.3	5.5%
2013	\$16.6	\$29.6	\$21.6	\$32.4	\$30.9	\$21.7	\$152.8	3.2%
2012	\$16.8	\$28.2	\$18.7	\$30.7	\$29.8	\$23.8	\$148.0	10.3%
2011	\$15.8	\$26.5	\$16.2	\$27.7	\$28.2	\$19.9	\$134.2	15.8%

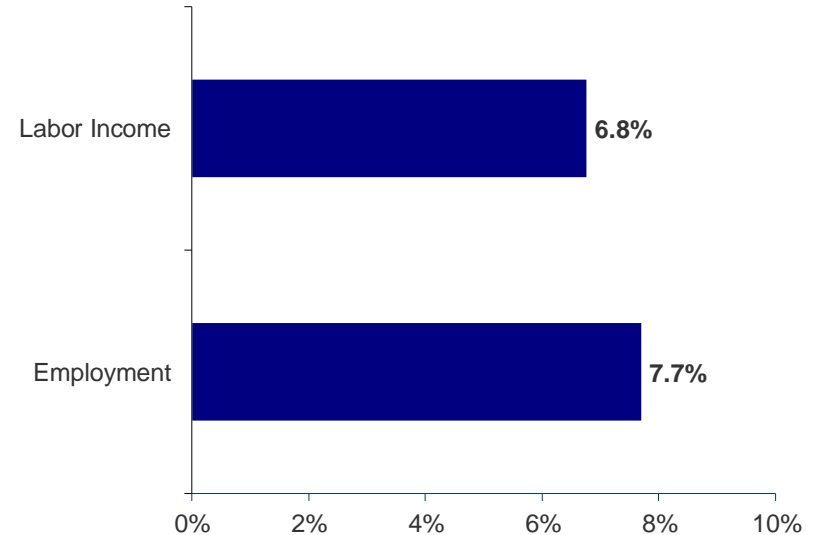
Tourism Industry Sales



Cecil County, Tourism Impact

Cecil County			
Tourism Employment			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	1,438	2,364	1.08%
2014	1,452	2,377	1.11%
2013	1,493	2,422	1.15%
2012	1,439	2,337	1.13%
2011	1,392	2,267	1.13%

Tourism Share of County Economy



Tourism Labor Income, (millions)			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	\$45.0	\$93.4	1.01%
2014	\$44.4	\$91.0	1.04%
2013	\$44.9	\$90.2	1.09%
2012	\$44.2	\$87.8	1.10%
2011	\$40.6	\$81.7	1.07%

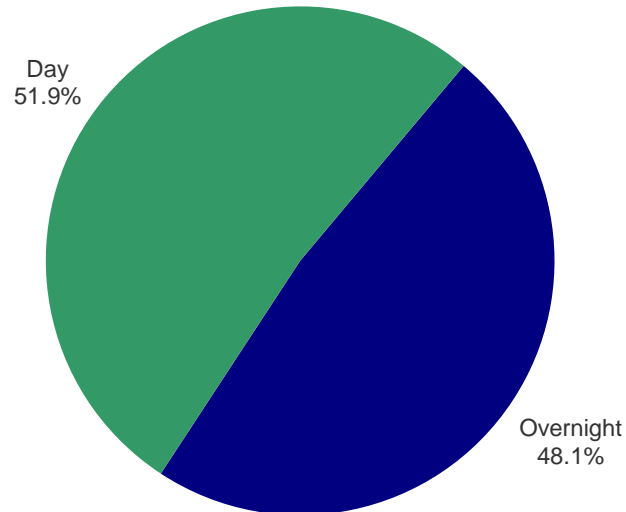
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$20.7	\$23.6	\$0.42	\$44.3
2014	\$20.1	\$23.0	\$0.42	\$43.1
2013	\$19.6	\$22.1	\$0.41	\$41.7
2012	\$19.1	\$21.4	\$0.39	\$40.5
2011	\$17.6	\$19.9	\$0.35	\$37.6

Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$164.3	\$177.5
\$161.3	\$174.1
\$152.8	\$162.6
\$148.0	\$159.3
\$134.2	\$144.0

Charles County, Visitors

Charles County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	508.1	547.9	1,056.0	8.1%
2014	473.0	504.1	977.1	6.4%
2013	424.3	493.7	917.9	2.5%
2012	427.1	468.0	895.1	-2.6%
2011	434.4	484.4	918.8	8.3%

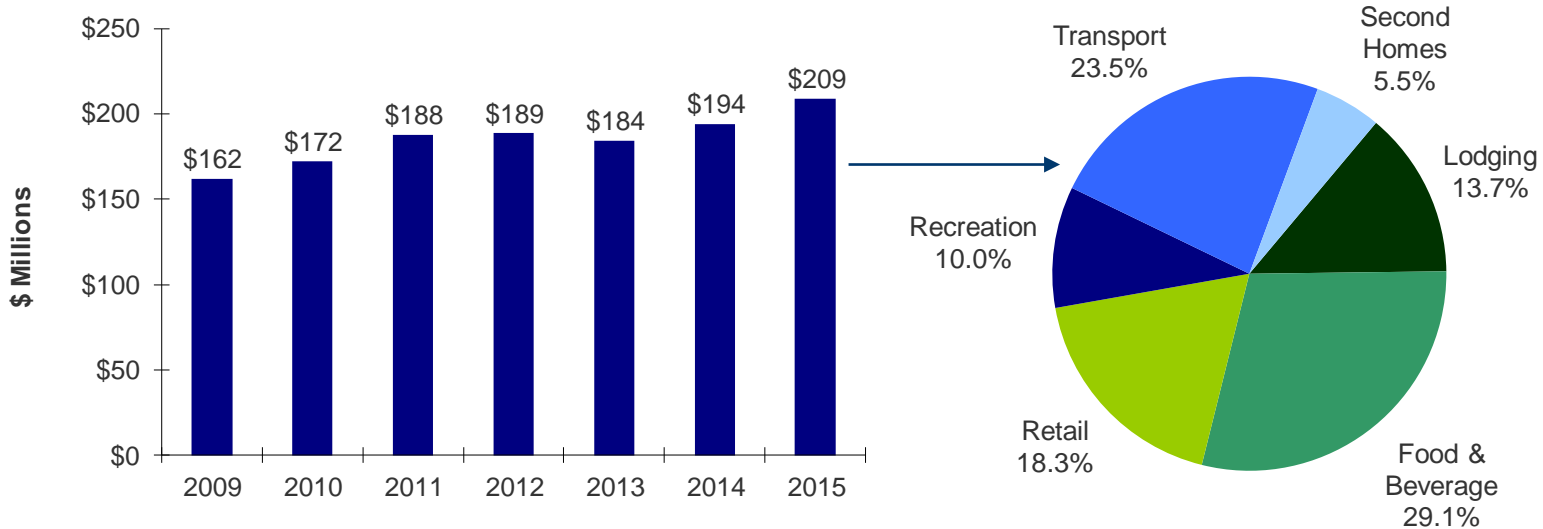
Visits by Type
2015



Charles County, Industry Sales

Charles County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$28.6	\$60.7	\$38.3	\$20.8	\$49.0	\$11.4	\$208.9	7.6%
2014	\$25.6	\$54.9	\$38.2	\$20.2	\$45.1	\$10.2	\$194.2	5.5%
2013	\$24.0	\$51.4	\$37.3	\$19.2	\$41.9	\$10.2	\$184.0	-2.4%
2012	\$26.6	\$51.7	\$35.3	\$19.8	\$43.9	\$11.1	\$188.5	0.3%
2011	\$26.5	\$51.3	\$34.1	\$19.7	\$43.8	\$12.4	\$187.8	9.2%

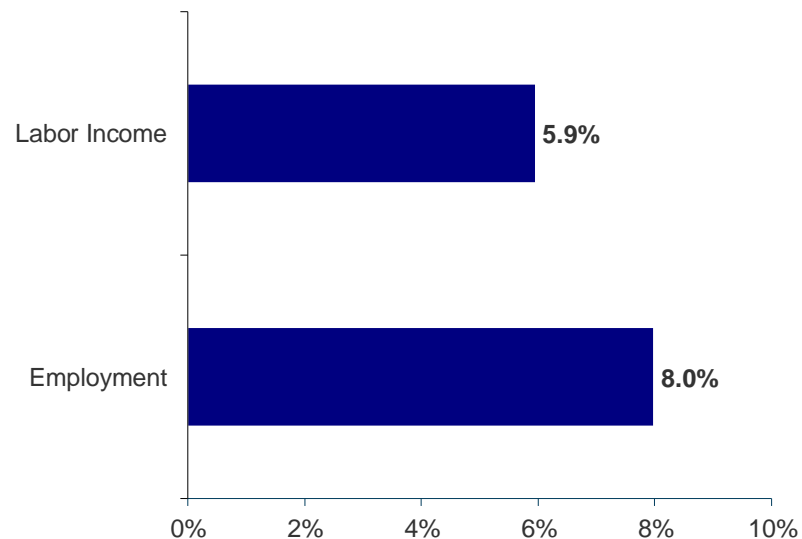
Tourism Industry Sales



Charles County, Tourism Impact

Charles County			
Tourism Employment			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	2,026	3,357	1.54%
2014	1,901	3,188	1.49%
2013	1,844	3,101	1.47%
2012	1,936	3,199	1.55%
2011	1,954	3,208	1.60%

Tourism Share of County Economy



Tourism Labor Income, (millions)			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	\$46.9	\$107.7	1.16%
2014	\$43.4	\$100.2	1.14%
2013	\$41.6	\$95.3	1.15%
2012	\$42.9	\$95.6	1.20%
2011	\$42.6	\$94.0	1.23%

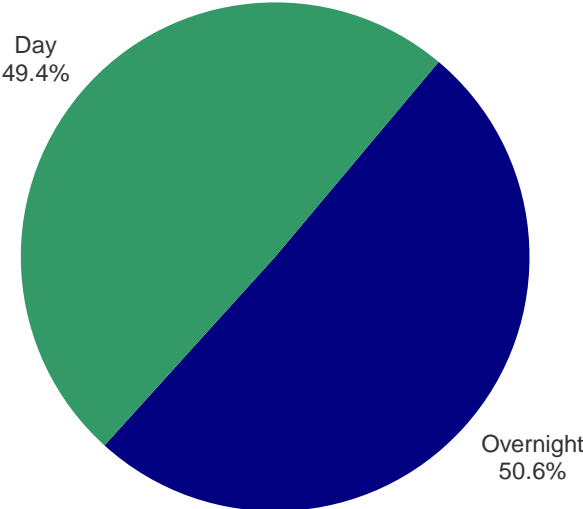
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$24.2	\$29.3	\$1.13	\$53.5
2014	\$22.4	\$27.2	\$0.97	\$49.6
2013	\$21.1	\$25.9	\$0.93	\$47.0
2012	\$21.3	\$26.5	\$1.03	\$47.8
2011	\$20.9	\$26.7	\$1.01	\$47.6

Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$208.9	\$225.6
\$194.2	\$209.6
\$184.0	\$195.8
\$188.5	\$202.9
\$187.8	\$201.6

Dorchester County, Visitors

Dorchester County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	147.5	144.0	291.6	4.1%
2014	141.7	138.4	280.1	2.7%
2013	139.4	133.3	272.7	3.0%
2012	135.3	129.4	264.7	2.7%
2011	128.7	129.2	257.9	-1.2%

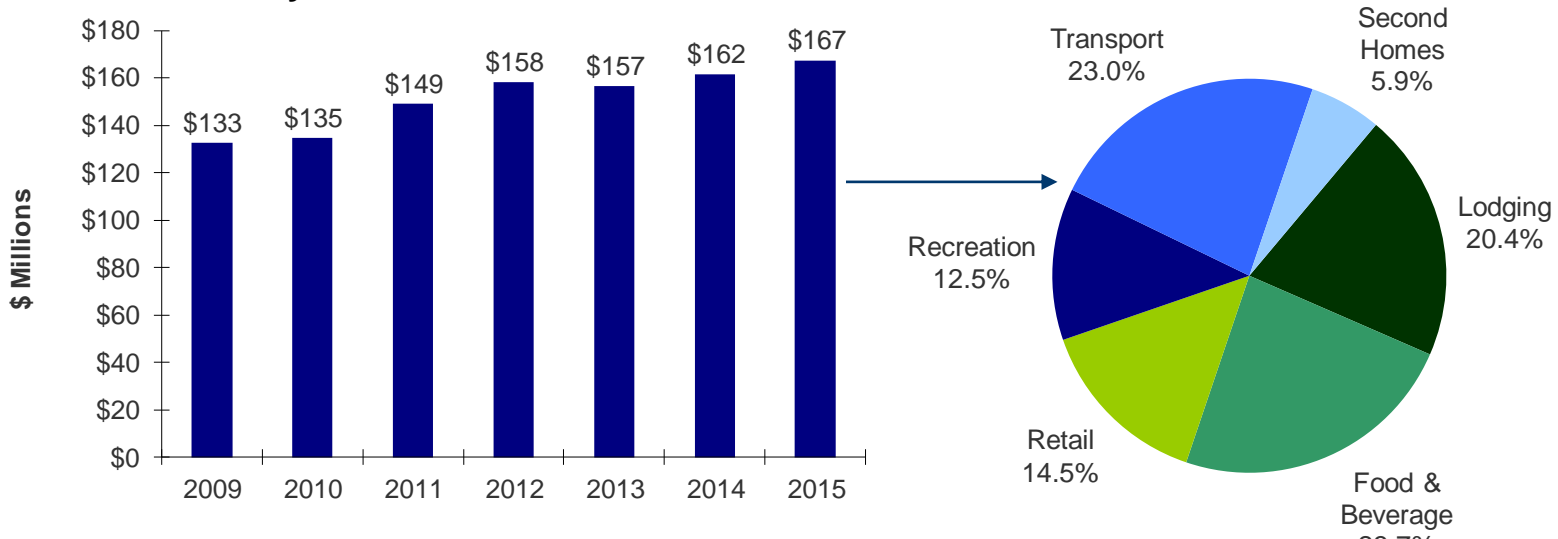
Visits by Type
2015



Dorchester County, Industry Sales

Dorchester County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$34.2	\$39.6	\$24.3	\$20.9	\$38.5	\$9.9	\$167.4	3.6%
2014	\$33.1	\$37.6	\$24.3	\$20.2	\$37.1	\$9.3	\$161.6	3.2%
2013	\$31.6	\$36.5	\$23.3	\$19.1	\$36.4	\$9.8	\$156.7	-1.1%
2012	\$33.4	\$36.2	\$23.2	\$19.1	\$36.9	\$9.6	\$158.4	6.2%
2011	\$31.5	\$33.6	\$21.8	\$19.0	\$35.0	\$8.2	\$149.2	10.8%

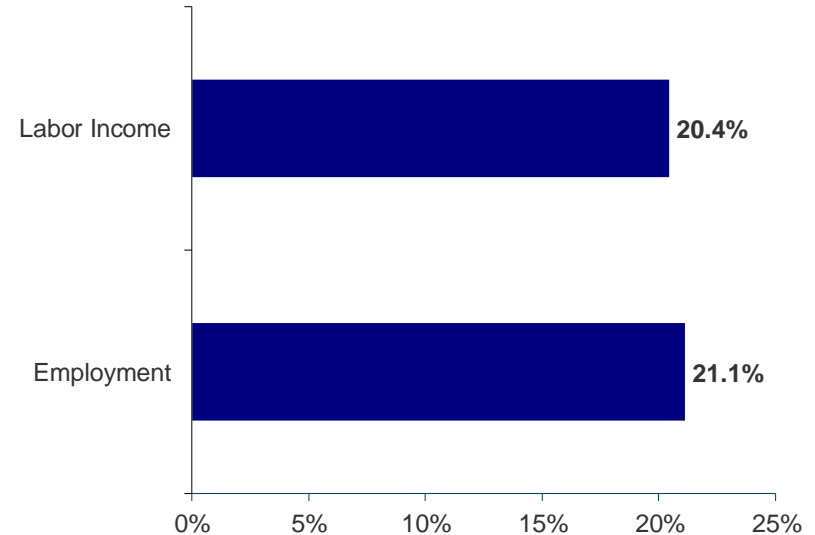
Tourism Industry Sales



Dorchester County, Tourism Impact

Dorchester County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	1,646	2,299	1.05%	
2014	1,659	2,320	1.08%	
2013	1,731	2,408	1.14%	
2012	1,688	2,344	1.14%	
2011	1,684	2,338	1.17%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$51.3	\$86.7	0.94%	
2014	\$49.6	\$83.4	0.95%	
2013	\$52.6	\$87.1	1.05%	
2012	\$49.8	\$82.0	1.03%	
2011	\$45.2	\$75.0	0.98%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$19.5	\$20.9	\$1.09	\$40.3
2014	\$18.7	\$20.1	\$1.02	\$38.8
2013	\$19.1	\$19.8	\$1.00	\$38.9
2012	\$18.2	\$19.9	\$1.01	\$38.2
2011	\$16.7	\$19.0	\$0.97	\$35.6

Tourism Share of County Economy

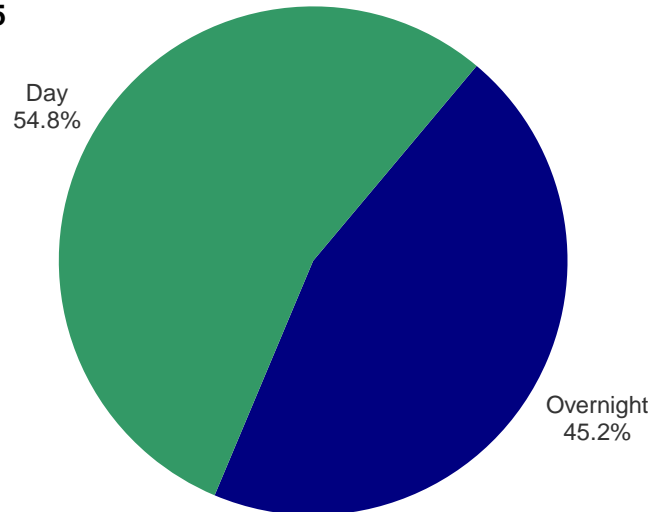


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$167.4	\$180.8
\$161.6	\$174.5
\$156.7	\$166.7
\$158.4	\$170.5
\$149.2	\$160.1

Frederick County, Visitors

Frederick County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	820.4	993.7	1,814.1	4.0%
2014	784.2	960.8	1,745.0	1.6%
2013	746.8	971.4	1,718.2	5.5%
2012	740.0	888.3	1,628.3	5.4%
2011	693.5	850.7	1,544.2	9.6%

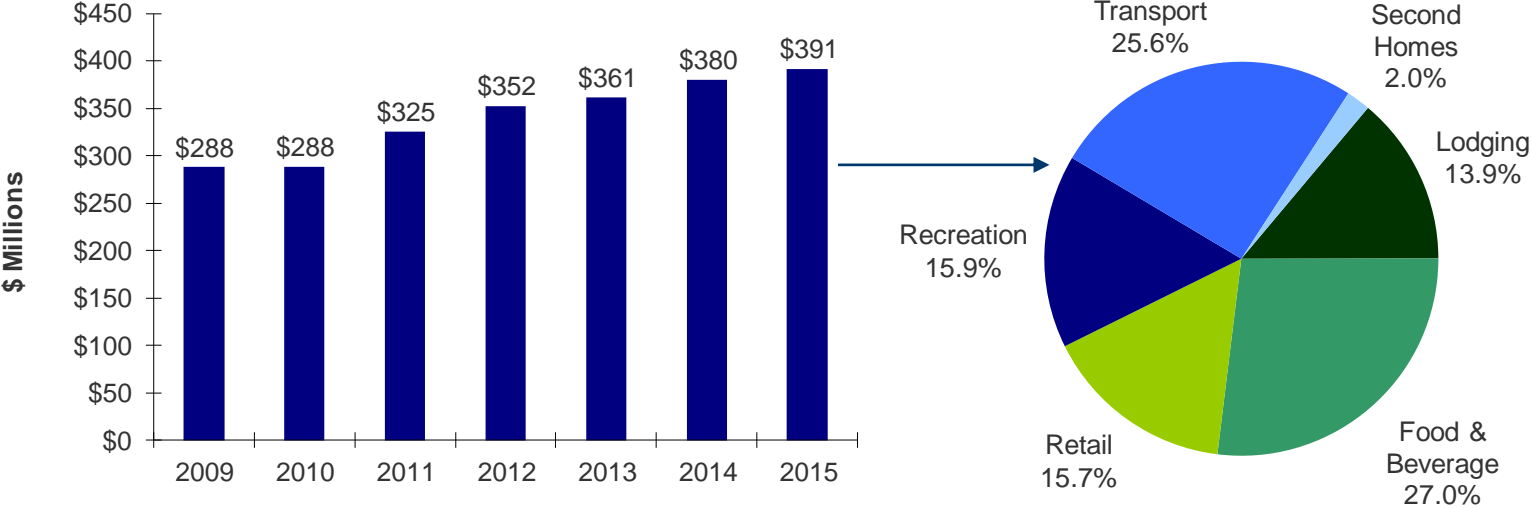
Visits by Type
2015



Frederick County, Industry Sales

Frederick County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$54.2	\$105.5	\$61.5	\$62.1	\$100.1	\$7.7	\$391.2	2.8%
2014	\$51.6	\$98.7	\$61.3	\$61.2	\$99.8	\$7.8	\$380.3	5.3%
2013	\$48.2	\$92.7	\$58.2	\$59.4	\$93.6	\$9.3	\$361.3	2.5%
2012	\$49.4	\$86.5	\$55.7	\$55.5	\$93.0	\$12.3	\$352.4	8.4%
2011	\$44.3	\$78.3	\$51.0	\$53.8	\$83.6	\$14.1	\$325.0	12.7%

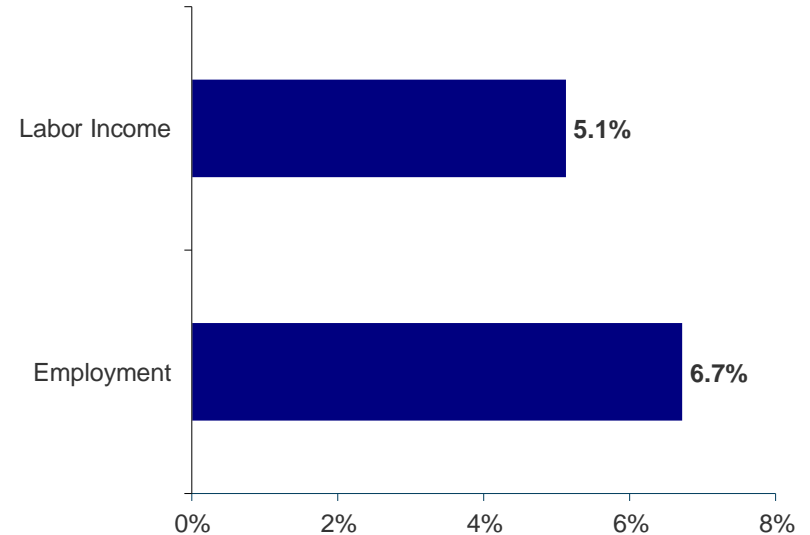
Tourism Industry Sales



Frederick County, Tourism Impact

Frederick County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	4,106	6,597	3.02%	
2014	4,019	6,473	3.03%	
2013	4,131	6,595	3.12%	
2012	3,908	6,268	3.04%	
2011	3,777	6,075	3.03%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$124.1	\$247.4	2.67%	
2014	\$119.7	\$236.9	2.70%	
2013	\$117.7	\$230.0	2.77%	
2012	\$109.9	\$215.0	2.69%	
2011	\$103.7	\$203.9	2.66%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$53.8	\$54.7	\$1.37	\$108.5
2014	\$51.5	\$53.0	\$1.27	\$104.5
2013	\$49.3	\$51.0	\$1.22	\$100.3
2012	\$46.5	\$49.6	\$1.21	\$96.1
2011	\$43.8	\$46.6	\$1.15	\$90.4

Tourism Share of County Economy

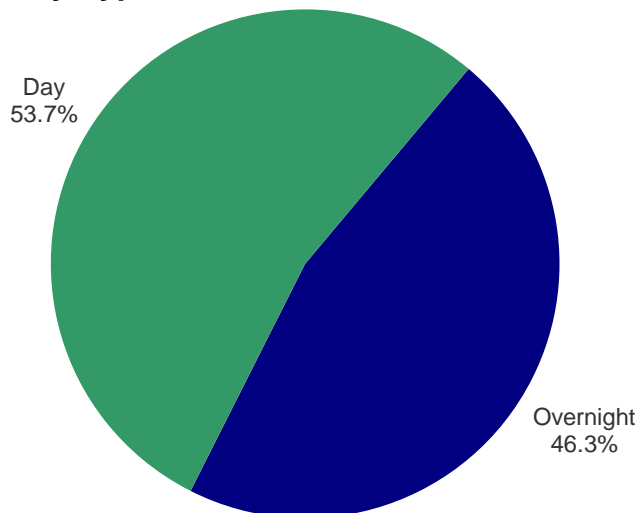


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$391.2	\$422.5
\$380.3	\$410.6
\$361.3	\$384.5
\$352.4	\$379.3
\$325.0	\$348.8

Garrett County, Visitors

Garrett County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	417.7	484.0	901.8	3.0%
2014	404.2	471.2	875.4	2.1%
2013	389.9	467.4	857.3	12.9%
2012	343.3	415.8	759.1	7.8%
2011	330.9	373.3	704.2	4.2%

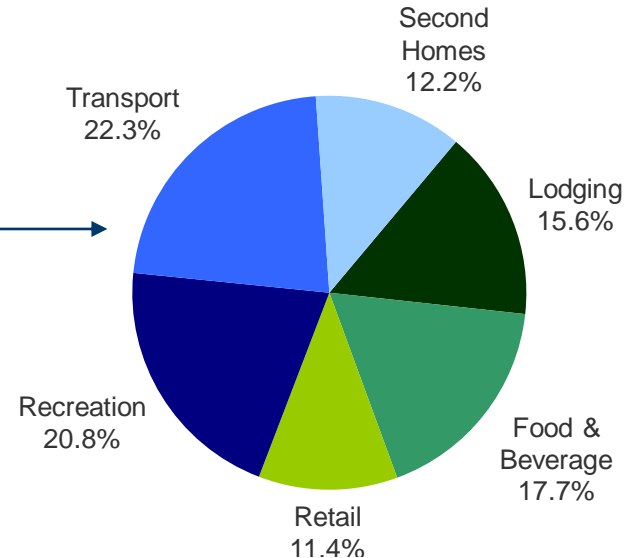
Visits by Type
2015



Garrett County, Industry Sales

Garrett County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$49.7	\$56.2	\$36.3	\$66.1	\$70.9	\$38.8	\$318.1	1.2%
2014	\$48.6	\$53.9	\$36.8	\$68.4	\$70.4	\$36.2	\$314.2	5.0%
2013	\$46.1	\$50.8	\$34.9	\$65.0	\$68.6	\$33.8	\$299.2	11.1%
2012	\$43.3	\$45.2	\$30.7	\$55.7	\$61.8	\$32.6	\$269.3	7.3%
2011	\$40.1	\$41.2	\$28.4	\$55.2	\$56.8	\$29.4	\$251.0	13.7%

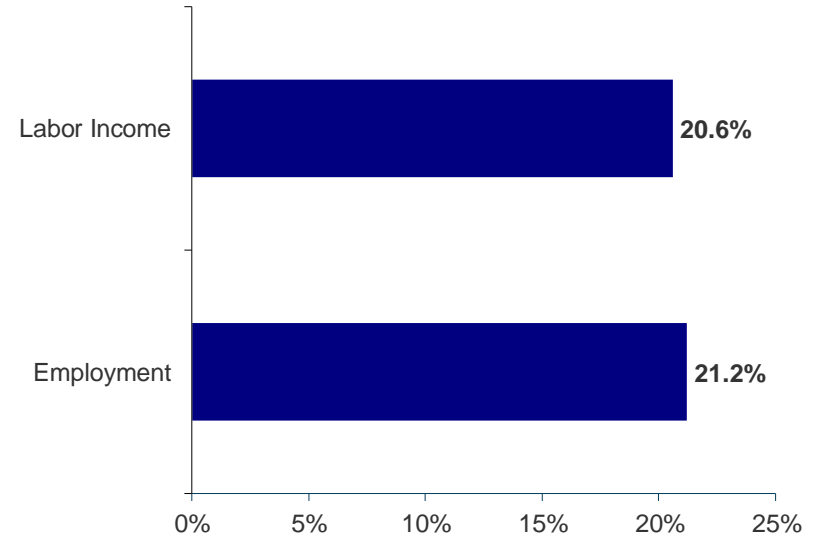
Tourism Industry Sales



Garrett County, Tourism Impact

Garrett County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	1,807	2,499	1.14%	
2014	1,835	2,539	1.19%	
2013	1,880	2,592	1.23%	
2012	1,730	2,390	1.16%	
2011	1,664	2,304	1.15%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$47.8	\$80.7	0.87%	
2014	\$47.9	\$80.1	0.91%	
2013	\$46.8	\$77.7	0.94%	
2012	\$42.8	\$70.9	0.89%	
2011	\$38.8	\$64.7	0.84%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$21.3	\$39.3	\$2.39	\$60.6
2014	\$21.0	\$38.8	\$2.33	\$59.8
2013	\$20.2	\$37.2	\$2.17	\$57.4
2012	\$18.3	\$33.7	\$1.93	\$52.0
2011	\$16.8	\$31.6	\$1.70	\$48.4

Tourism Share of County Economy

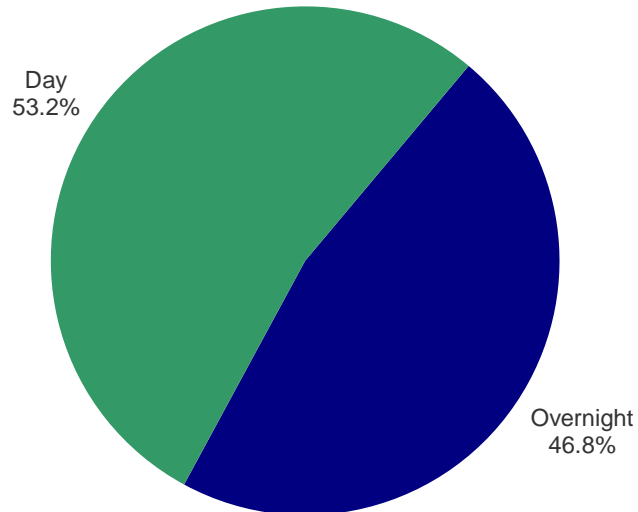


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$318.1	\$343.6
\$314.2	\$339.2
\$299.2	\$318.4
\$269.3	\$289.9
\$251.0	\$269.4

Harford County, Visitors

Harford County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	864.1	983.0	1,847.1	2.9%
2014	844.8	949.7	1,794.4	5.8%
2013	766.3	929.1	1,695.4	0.6%
2012	767.4	917.3	1,684.8	5.2%
2011	733.0	868.7	1,601.7	7.9%

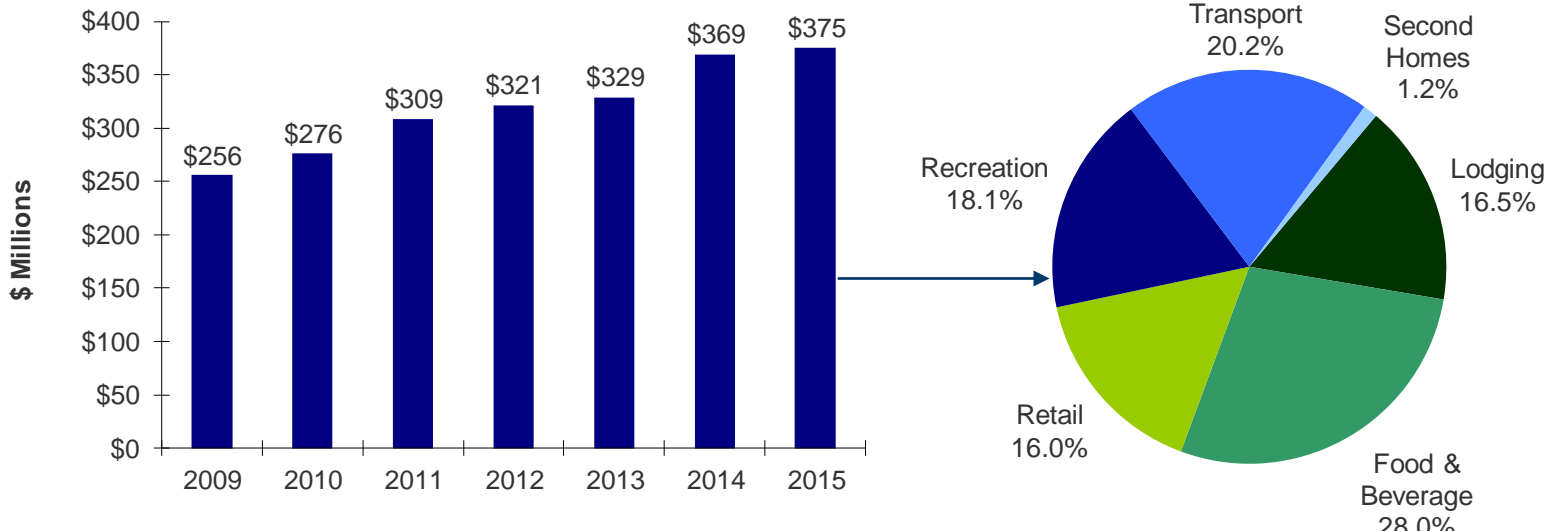
Visits by Type
2015



Harford County, Industry Sales

Harford County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$62.1	\$105.0	\$60.2	\$67.7	\$75.7	\$4.4	\$375.1	1.7%
2014	\$60.8	\$99.0	\$61.8	\$65.7	\$77.1	\$4.5	\$369.0	12.1%
2013	\$52.8	\$87.4	\$56.3	\$60.8	\$66.7	\$5.0	\$329.0	2.4%
2012	\$53.8	\$83.8	\$54.1	\$58.4	\$65.5	\$5.7	\$321.4	4.1%
2011	\$51.8	\$79.6	\$52.0	\$55.7	\$63.3	\$6.2	\$308.6	11.7%

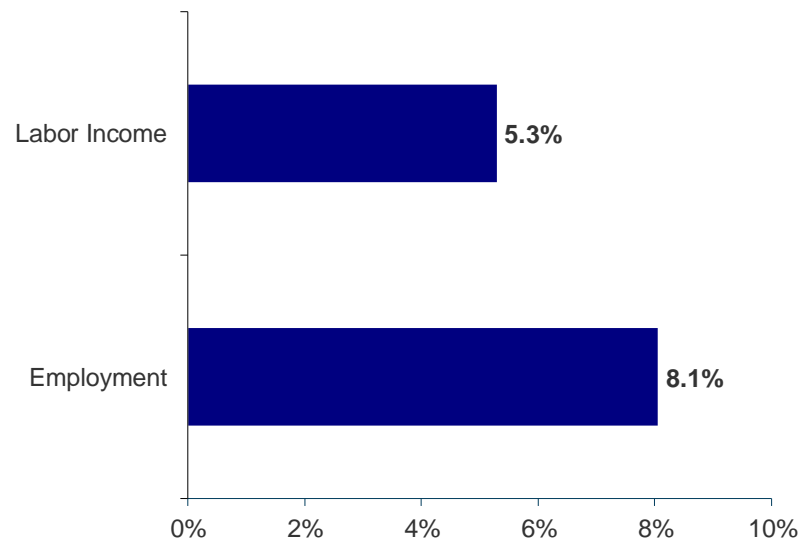
Tourism Industry Sales



Harford County, Tourism Impact

Harford County			
Tourism Employment			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	4,598	7,239	3.31%
2014	4,510	7,114	3.33%
2013	4,277	6,789	3.21%
2012	4,234	6,694	3.24%
2011	4,061	6,447	3.21%

Tourism Share of County Economy



Tourism Labor Income, (millions)			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	\$116.7	\$238.3	2.57%
2014	\$112.5	\$228.0	2.60%
2013	\$101.2	\$206.9	2.49%
2012	\$100.5	\$202.8	2.54%
2011	\$94.8	\$192.3	2.51%

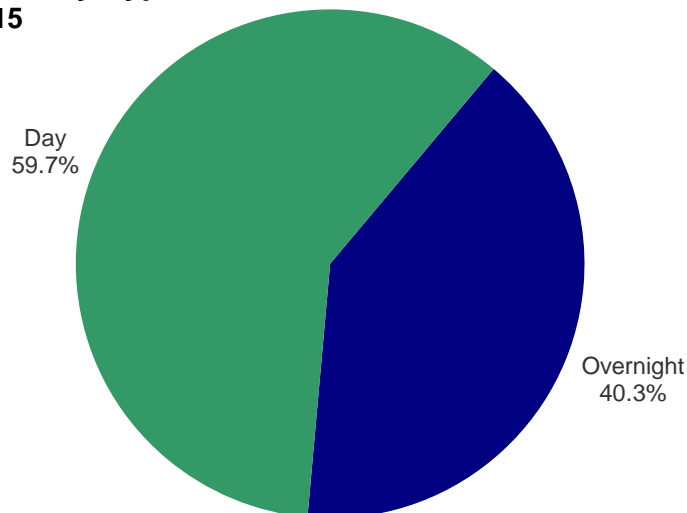
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$51.8	\$52.9	\$1.20	\$104.7
2014	\$49.6	\$50.7	\$0.00	\$100.3
2013	\$44.5	\$45.9	\$0.00	\$90.4
2012	\$43.7	\$45.3	\$0.00	\$89.0
2011	\$41.3	\$43.8	\$0.00	\$85.1

Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$375.1	\$405.2
\$369.0	\$398.3
\$329.0	\$350.1
\$321.4	\$345.9
\$308.6	\$331.2

Howard County, Visitors

Howard County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	1,140.2	1,688.3	2,828.5	5.9%
2014	1,085.8	1,585.6	2,671.3	1.9%
2013	1,040.9	1,581.7	2,622.6	5.3%
2012	1,006.3	1,484.9	2,491.2	4.5%
2011	953.3	1,431.0	2,384.3	5.5%

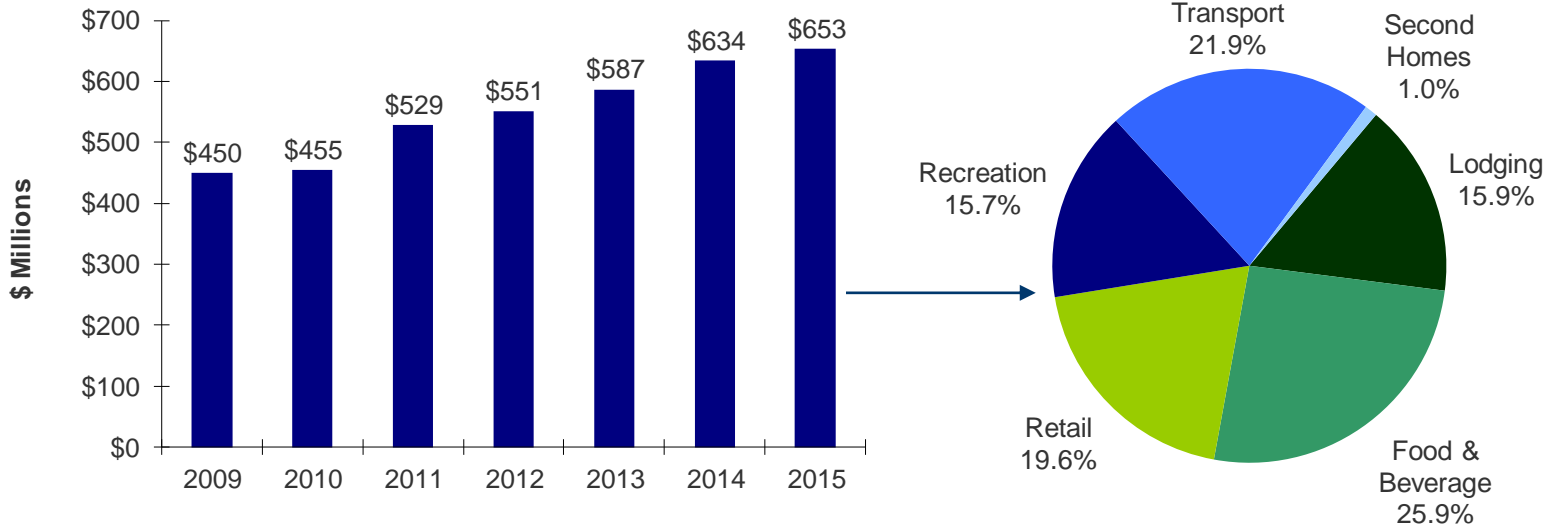
Visits by Type
2015



Howard County, Industry Sales

Howard County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$103.9	\$168.9	\$127.8	\$102.7	\$143.1	\$6.7	\$653.3	3.1%
2014	\$99.9	\$159.4	\$126.2	\$101.8	\$140.6	\$5.8	\$633.7	8.0%
2013	\$92.3	\$146.0	\$117.6	\$93.3	\$133.5	\$4.2	\$586.8	6.4%
2012	\$91.8	\$136.9	\$109.8	\$83.6	\$126.0	\$3.3	\$551.3	4.3%
2011	\$89.2	\$129.5	\$104.7	\$80.0	\$122.8	\$2.5	\$528.6	16.2%

Tourism Industry Sales

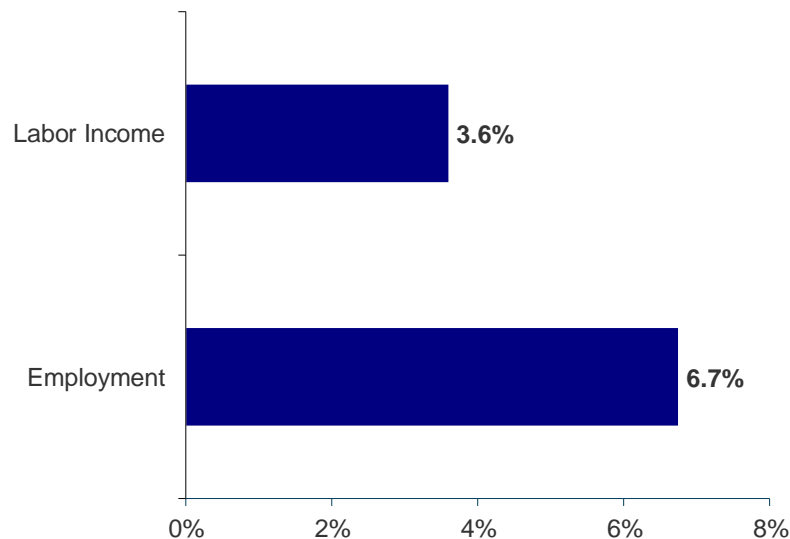


Howard County, Tourism Impact

Howard County			
Tourism Employment			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	7,235	11,122	5.09%
2014	7,145	10,996	5.14%
2013	6,996	10,769	5.10%
2012	6,673	10,295	4.99%
2011	6,408	9,922	4.94%

Tourism Labor Income, (millions)			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	\$201.4	\$379.7	4.10%
2014	\$195.8	\$366.3	4.18%
2013	\$186.9	\$347.5	4.18%
2012	\$178.4	\$330.2	4.13%
2011	\$166.0	\$309.5	4.04%

Tourism Share of County Economy



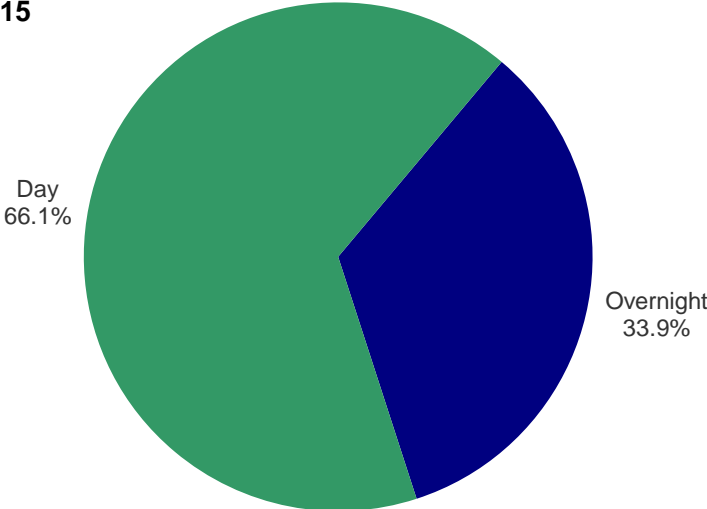
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$83.7	\$92.2	\$5.10	\$175.8
2014	\$80.5	\$88.9	\$4.77	\$169.4
2013	\$75.4	\$83.7	\$4.50	\$159.1
2012	\$71.7	\$79.5	\$4.31	\$151.2
2011	\$67.1	\$76.2	\$3.62	\$143.4

Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$653.3	\$705.8
\$633.7	\$684.1
\$586.8	\$624.5
\$551.3	\$593.4
\$528.6	\$567.3

Kent County, Visitors

Kent County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	88.8	173.1	261.9	1.1%
2014	86.4	172.6	259.0	-0.1%
2013	79.6	179.5	259.1	2.8%
2012	77.4	174.8	252.2	3.3%
2011	71.4	172.8	244.2	3.0%

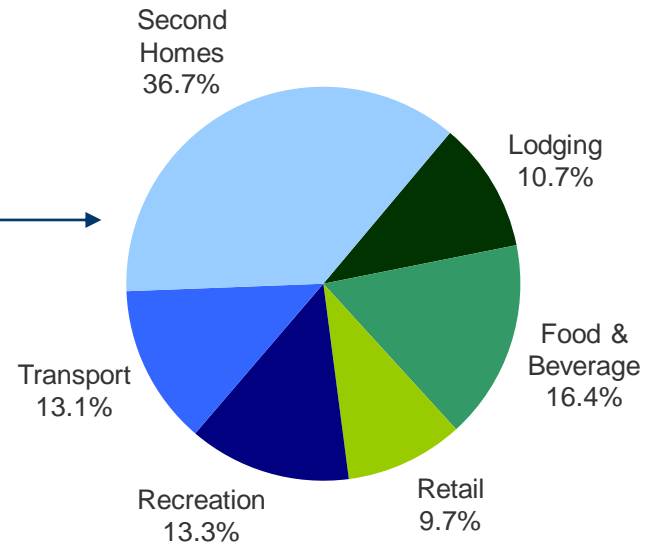
Visits by Type
2015



Kent County, Industry Sales

Kent County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$6.4	\$9.7	\$5.8	\$7.9	\$7.8	\$21.8	\$59.4	6.4%
2014	\$6.2	\$9.2	\$5.8	\$8.5	\$7.4	\$18.9	\$55.9	11.0%
2013	\$5.7	\$8.5	\$5.2	\$8.6	\$6.9	\$15.5	\$50.3	-1.3%
2012	\$5.8	\$8.1	\$4.7	\$8.9	\$7.0	\$16.5	\$51.0	8.0%
2011	\$5.3	\$7.5	\$4.4	\$8.4	\$6.2	\$15.4	\$47.2	13.0%

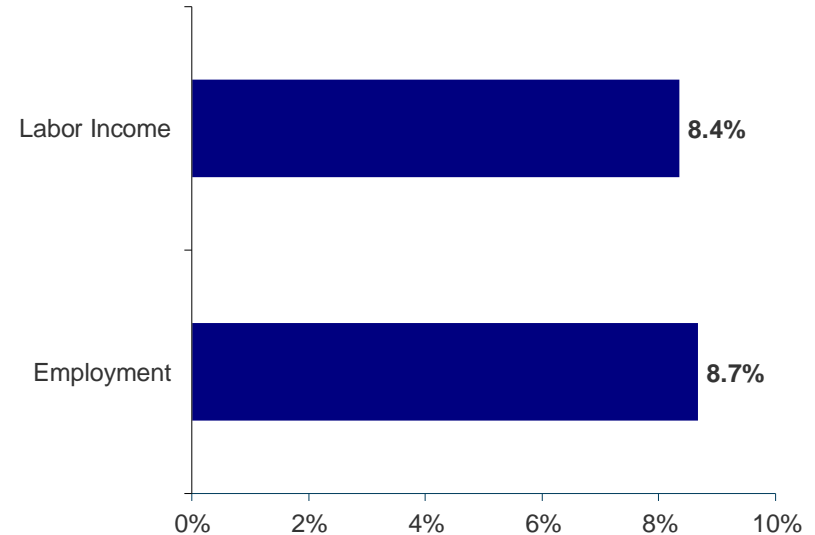
Tourism Industry Sales



Kent County, Tourism Impact

Kent County			
Tourism Employment			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	464	710	0.32%
2014	471	719	0.34%
2013	475	721	0.34%
2012	480	725	0.35%
2011	461	698	0.35%

Tourism Share of County Economy



Tourism Labor Income, (millions)			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	\$13.6	\$25.7	0.28%
2014	\$14.0	\$25.9	0.30%
2013	\$13.7	\$25.2	0.30%
2012	\$14.0	\$25.3	0.32%
2011	\$13.3	\$24.2	0.32%

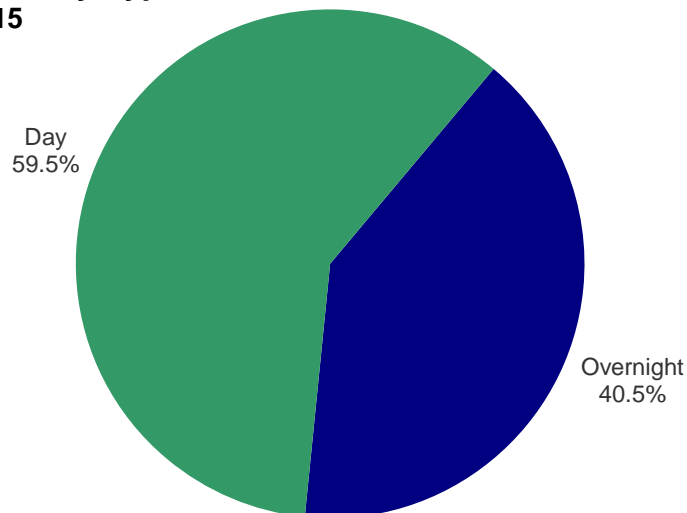
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$6.0	\$8.0	\$0.29	\$13.9
2014	\$5.9	\$7.5	\$0.17	\$13.4
2013	\$5.6	\$7.0	\$0.15	\$12.6
2012	\$5.7	\$7.2	\$0.25	\$12.8
2011	\$5.4	\$6.8	\$0.24	\$12.1

Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$59.4	\$64.2
\$55.9	\$60.3
\$50.3	\$53.6
\$51.0	\$54.9
\$47.2	\$50.7

Montgomery County, Visitors

Montgomery County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	3,401.8	5,002.0	8,403.7	4.5%
2014	3,253.5	4,785.4	8,038.9	6.0%
2013	3,122.7	4,460.0	7,582.8	3.8%
2012	3,030.2	4,274.2	7,304.5	3.4%
2011	2,903.3	4,160.6	7,063.9	3.6%

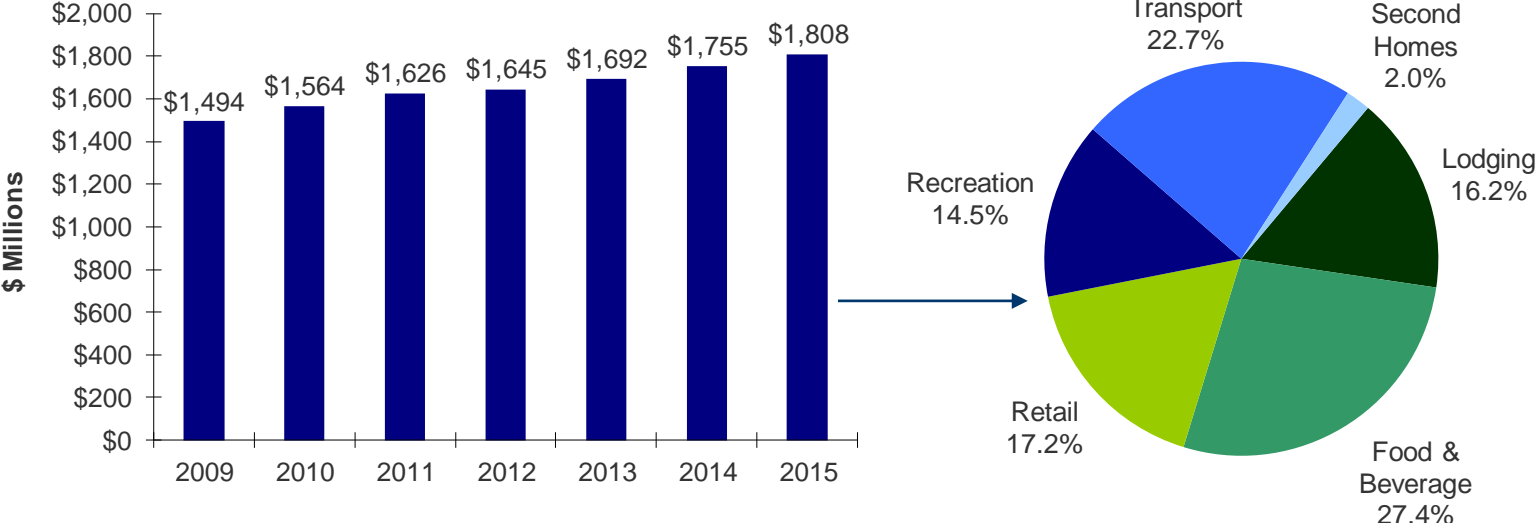
Visits by Type
2015



Montgomery County, Industry Sales

Montgomery County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$293.3	\$495.4	\$310.4	\$262.3	\$410.0	\$36.4	\$1,807.8	3.0%
2014	\$281.6	\$465.4	\$317.5	\$252.1	\$404.0	\$34.2	\$1,754.8	3.7%
2013	\$269.3	\$440.8	\$307.6	\$248.4	\$390.0	\$36.1	\$1,692.2	2.9%
2012	\$272.6	\$417.9	\$300.0	\$239.3	\$378.8	\$36.2	\$1,644.8	1.2%
2011	\$270.5	\$401.9	\$292.9	\$249.3	\$378.4	\$32.6	\$1,625.6	3.9%

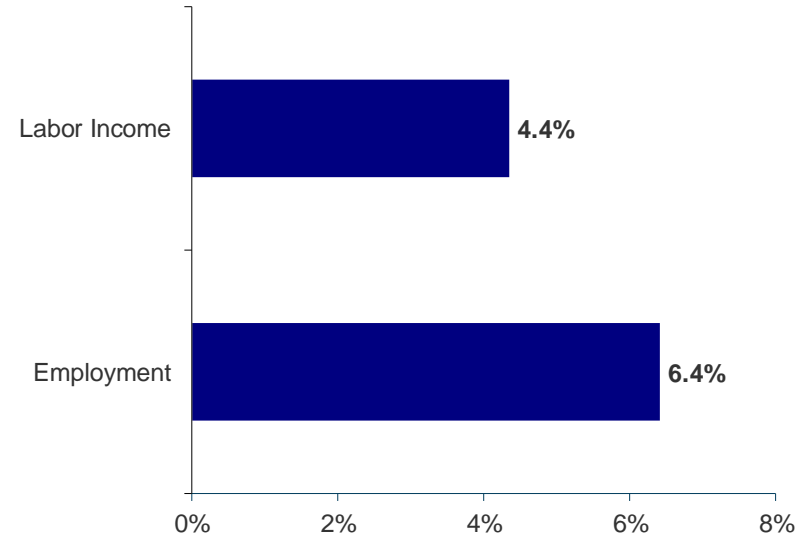
Tourism Industry Sales



Montgomery County, Tourism Impact

Montgomery County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	18,381	29,456	13.48%	
2014	17,946	28,841	13.49%	
2013	18,695	29,712	14.06%	
2012	18,279	29,004	14.05%	
2011	18,325	28,956	14.43%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$755.2	\$1,398.1	15.09%	
2014	\$690.5	\$1,281.7	14.63%	
2013	\$692.5	\$1,267.2	15.25%	
2012	\$697.7	\$1,259.0	15.74%	
2011	\$695.2	\$1,249.3	16.31%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$296.4	\$273.5	\$19.45	\$569.8
2014	\$272.8	\$263.4	\$19.23	\$536.2
2013	\$266.0	\$255.4	\$19.14	\$521.4
2012	\$264.3	\$250.4	\$18.72	\$514.8
2011	\$261.0	\$249.1	\$18.45	\$510.1

Tourism Share of County Economy

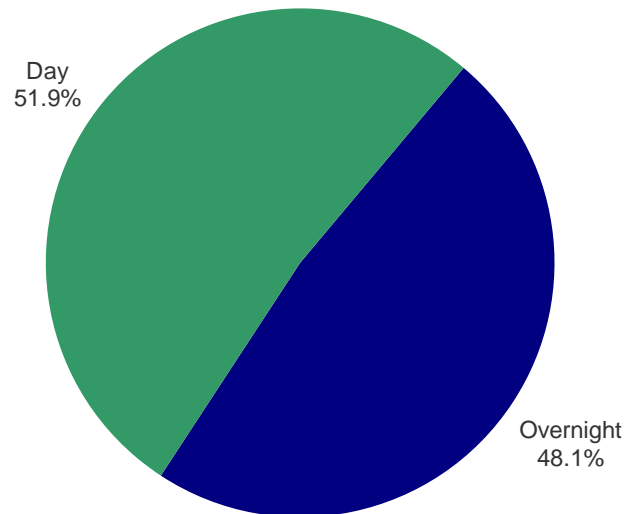


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$1,807.8	\$1,952.9
\$1,754.8	\$1,894.4
\$1,692.2	\$1,800.7
\$1,644.8	\$1,770.3
\$1,625.6	\$1,744.7

Prince George's County, Visitors

Prince George's County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	3,330.3	3,591.5	6,921.9	6.2%
2014	3,132.8	3,387.9	6,520.7	5.9%
2013	2,930.0	3,230.0	6,160.0	3.0%
2012	2,852.3	3,126.6	5,978.8	4.4%
2011	2,698.5	3,026.3	5,724.8	3.3%

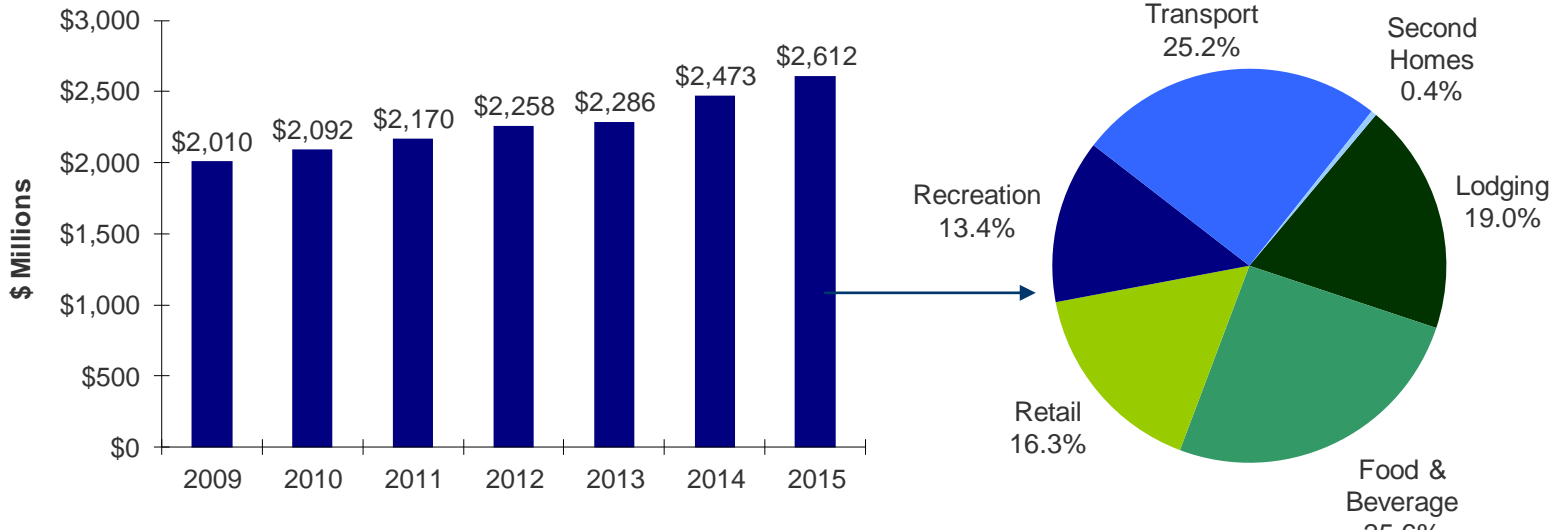
Visits by Type
2015



Prince George's County, Industry Sales

Prince George's County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$496.3	\$668.9	\$426.0	\$351.2	\$657.6	\$11.7	\$2,611.8	5.6%
2014	\$465.0	\$616.2	\$419.6	\$330.4	\$631.0	\$10.6	\$2,472.9	8.2%
2013	\$427.2	\$567.3	\$388.4	\$306.0	\$583.9	\$13.2	\$2,286.1	1.2%
2012	\$442.0	\$548.3	\$376.4	\$296.2	\$581.8	\$13.8	\$2,258.4	4.1%
2011	\$424.3	\$516.4	\$357.9	\$298.3	\$559.6	\$14.0	\$2,170.5	3.8%

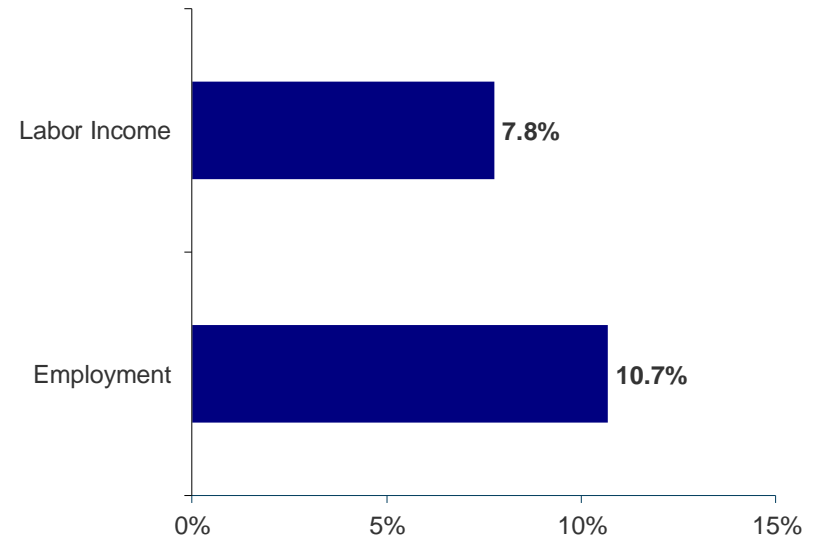
Tourism Industry Sales



Prince George's County, Tourism Impact

Prince George's County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	21,761	32,726	14.98%	
2014	21,184	31,965	14.95%	
2013	20,623	31,144	14.74%	
2012	20,446	30,767	14.90%	
2011	20,150	30,309	15.10%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$709.9	\$1,300.0	14.03%	
2014	\$697.1	\$1,265.1	14.44%	
2013	\$649.8	\$1,176.8	14.16%	
2012	\$641.1	\$1,149.1	14.37%	
2011	\$630.4	\$1,127.7	14.72%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$293.8	\$344.3	\$24.95	\$638.1
2014	\$283.6	\$324.2	\$20.81	\$607.8
2013	\$261.1	\$303.2	\$20.31	\$564.3
2012	\$256.1	\$301.0	\$20.47	\$557.1
2011	\$249.4	\$293.1	\$19.89	\$542.5

Tourism Share of County Economy

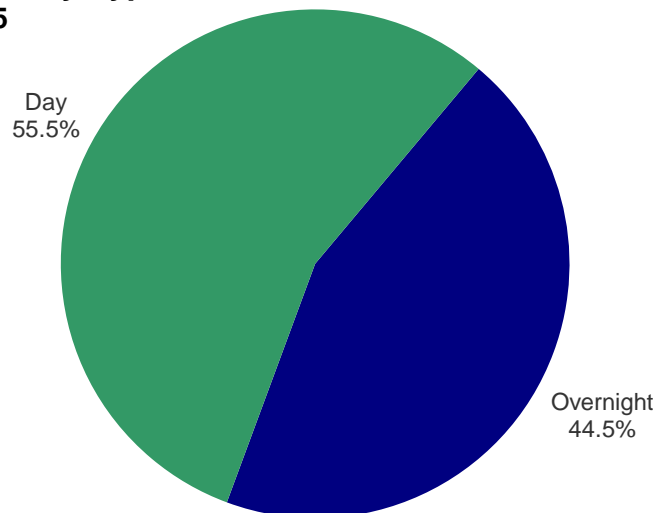


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$2,611.8	\$2,821.4
\$2,472.9	\$2,669.6
\$2,286.1	\$2,432.7
\$2,258.4	\$2,430.8
\$2,170.5	\$2,329.4

Queen Anne's County, Visitors

Queen Anne's County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	155.4	193.6	349.0	4.6%
2014	148.9	184.9	333.7	-0.1%
2013	145.8	188.2	334.0	2.9%
2012	141.8	182.8	324.7	0.6%
2011	136.4	186.3	322.7	7.1%

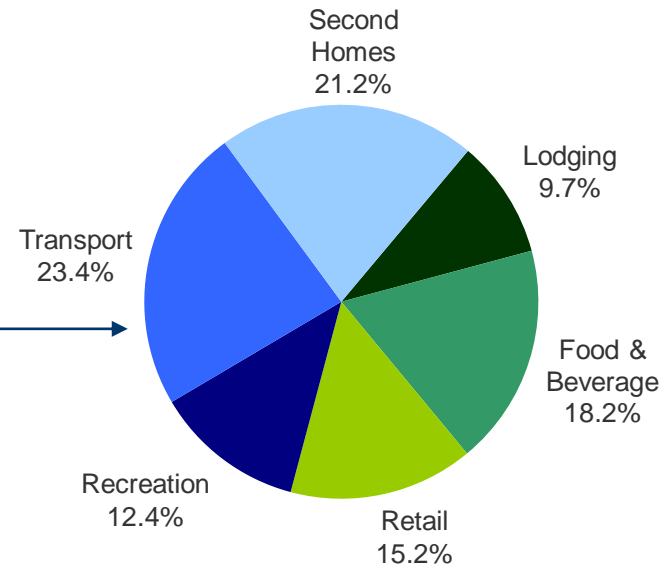
Visits by Type
2015



Queen Anne's County, Industry Sales

Queen Anne's County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$12.6	\$23.6	\$19.7	\$16.0	\$30.4	\$27.5	\$129.8	3.6%
2014	\$12.0	\$22.2	\$19.6	\$15.3	\$28.5	\$27.7	\$125.3	7.3%
2013	\$11.6	\$20.6	\$18.6	\$14.6	\$27.8	\$23.6	\$116.8	0.6%
2012	\$11.6	\$20.1	\$17.6	\$14.1	\$27.1	\$25.5	\$116.0	4.2%
2011	\$11.1	\$18.9	\$16.4	\$14.3	\$26.5	\$24.2	\$111.4	12.9%

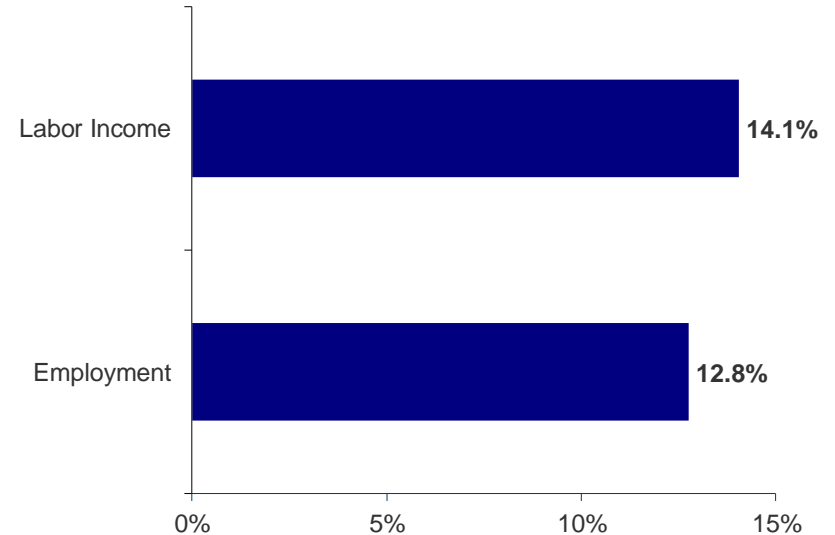
Tourism Industry Sales



Queen Anne's County, Tourism Impact

Queen Anne's County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	1,235	1,838	0.84%	
2014	1,194	1,784	0.83%	
2013	1,164	1,739	0.82%	
2012	1,158	1,724	0.84%	
2011	1,132	1,687	0.84%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$40.9	\$74.5	0.80%	
2014	\$40.6	\$73.1	0.83%	
2013	\$40.1	\$71.5	0.86%	
2012	\$37.7	\$67.0	0.84%	
2011	\$37.0	\$65.6	0.86%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$16.4	\$16.7	\$0.49	\$33.1
2014	\$16.1	\$16.1	\$0.45	\$32.2
2013	\$15.4	\$15.3	\$0.44	\$30.7
2012	\$14.6	\$15.2	\$0.46	\$29.8
2011	\$14.2	\$14.8	\$0.45	\$29.0

Tourism Share of County Economy

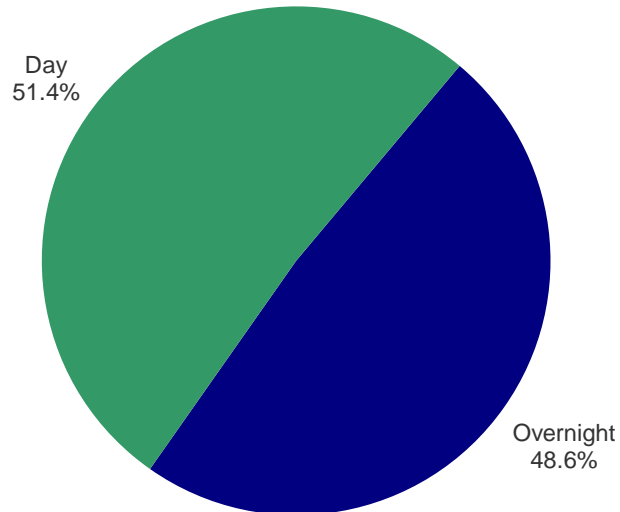


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$129.8	\$140.2
\$125.3	\$135.3
\$116.8	\$124.3
\$116.0	\$124.9
\$111.4	\$119.5

St. Mary's County, Visitors

St. Mary's County				
Visitors (thousands)				
Year	Overnight	Day	Total	Growth Rate
2015	377.7	399.0	776.7	15.9%
2014	329.8	340.6	670.4	2.4%
2013	314.9	339.5	654.4	1.2%
2012	314.1	332.6	646.7	3.3%
2011	302.5	323.7	626.2	6.9%

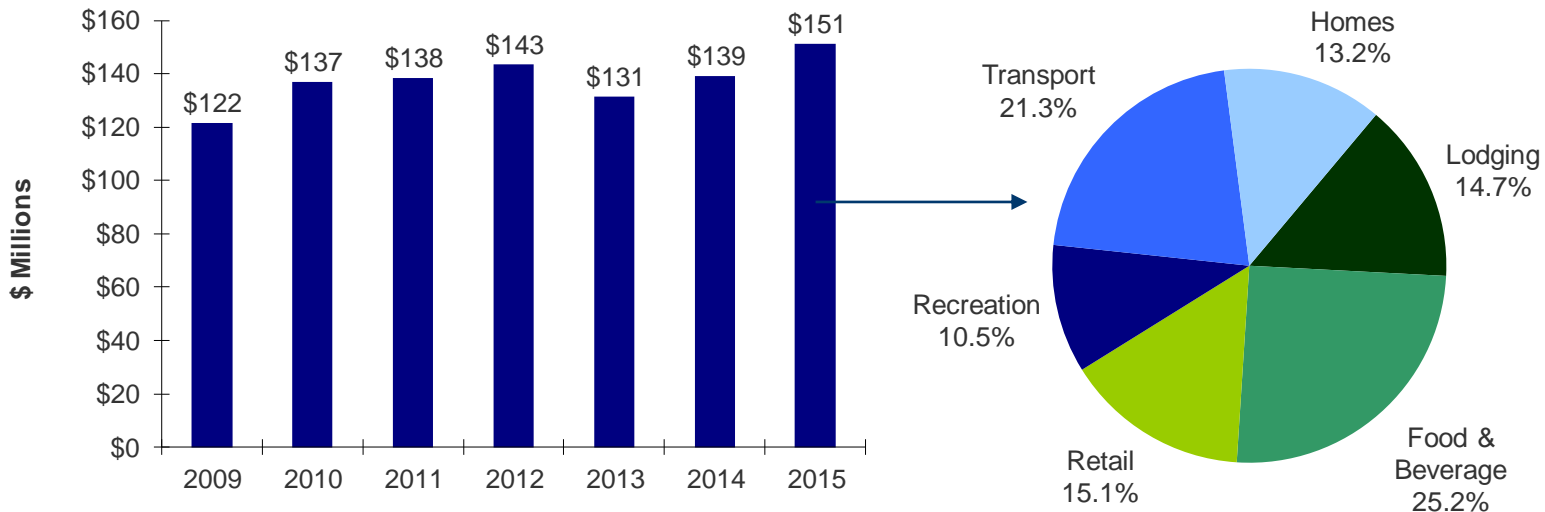
Visits by Type
2015



St. Mary's County, Industry Sales

St. Mary's County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$22.3	\$38.1	\$22.9	\$15.9	\$32.2	\$19.9	\$151.2	8.7%
2014	\$20.4	\$34.7	\$22.5	\$14.6	\$29.8	\$17.2	\$139.2	5.9%
2013	\$19.5	\$32.0	\$21.7	\$13.1	\$28.6	\$16.6	\$131.4	-8.4%
2012	\$21.9	\$32.3	\$23.1	\$15.4	\$30.9	\$19.9	\$143.5	3.8%
2011	\$21.3	\$30.4	\$22.3	\$14.8	\$29.6	\$19.8	\$138.3	0.9%

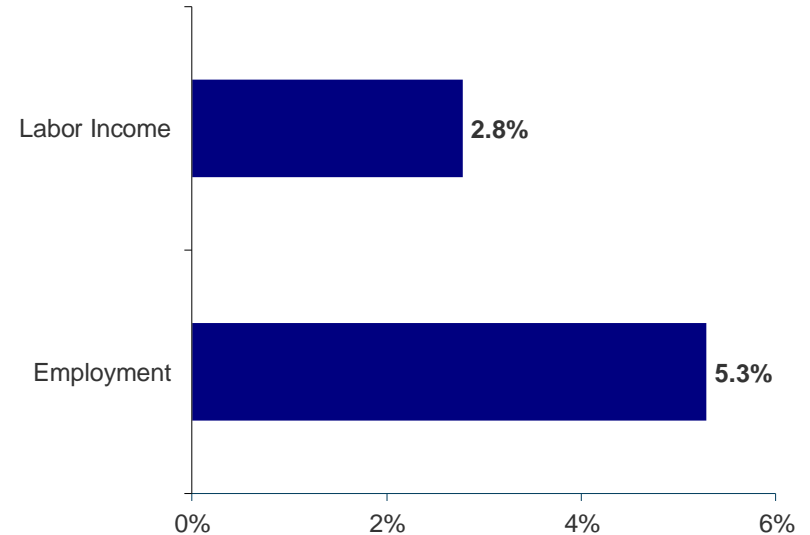
Tourism Industry Sales



St. Mary's County, Tourism Impact

St. Mary's County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	1,314	2,286	1.05%	
2014	1,225	2,164	1.01%	
2013	1,231	2,161	1.02%	
2012	1,308	2,245	1.09%	
2011	1,226	2,126	1.06%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$33.5	\$77.2	0.83%	
2014	\$30.7	\$71.2	0.81%	
2013	\$30.2	\$69.1	0.83%	
2012	\$31.7	\$70.0	0.88%	
2011	\$29.6	\$66.1	0.86%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$17.4	\$21.3	\$0.85	\$38.7
2014	\$16.0	\$19.4	\$0.73	\$35.3
2013	\$15.3	\$18.6	\$0.79	\$33.9
2012	\$15.7	\$20.0	\$0.86	\$35.7
2011	\$14.8	\$19.4	\$0.81	\$34.2

Tourism Share of County Economy

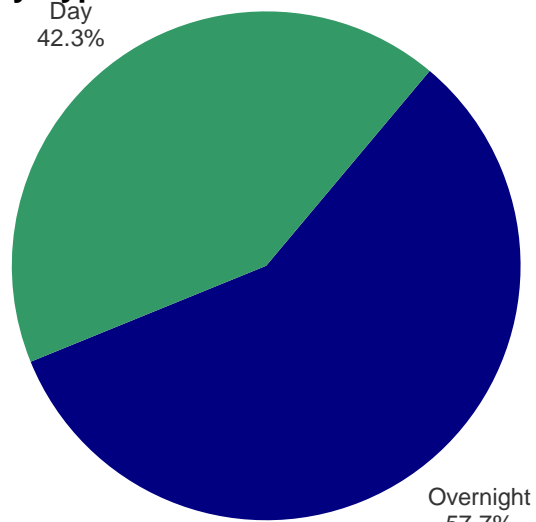


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$151.2	\$163.4
\$139.2	\$150.2
\$131.4	\$139.8
\$143.5	\$154.4
\$138.3	\$148.4

Somerset County, Visitors

Somerset County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	65.2	47.7	112.8	6.2%
2014	63.0	43.3	106.3	4.4%
2013	59.6	42.2	101.9	4.4%
2012	58.0	39.5	97.5	2.0%
2011	57.1	38.5	95.6	4.7%

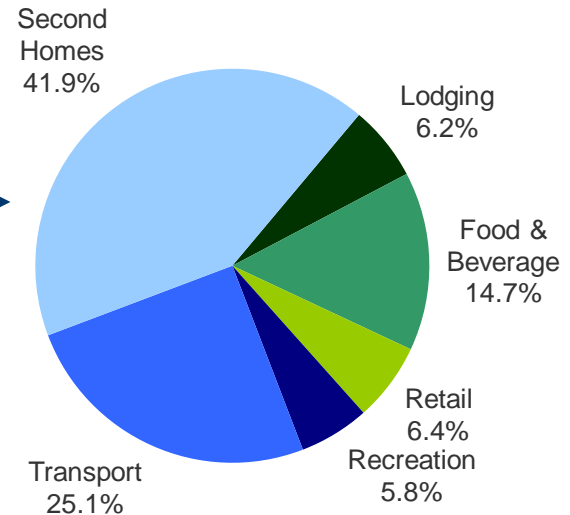
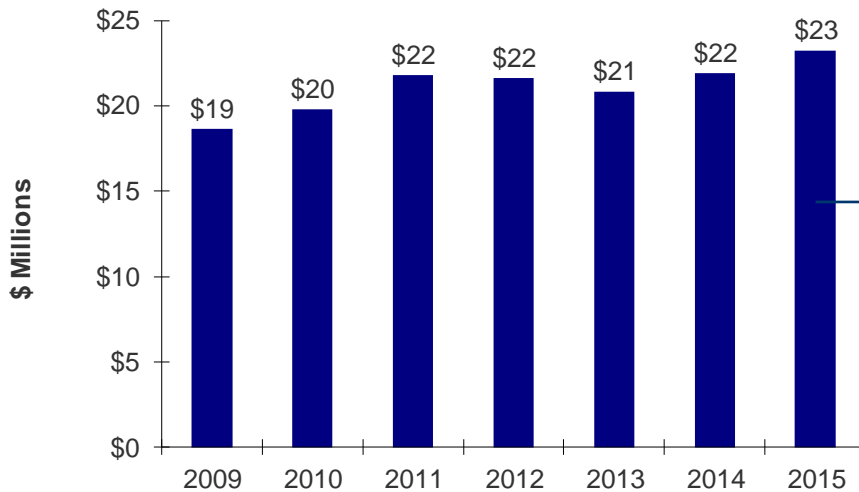
Visits by Type
2015



Somerset County, Industry Sales

Somerset County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$1.4	\$3.4	\$1.5	\$1.3	\$5.8	\$9.7	\$23.3	6.2%
2014	\$1.3	\$3.2	\$1.5	\$1.2	\$5.4	\$9.3	\$21.9	5.1%
2013	\$1.2	\$3.0	\$1.5	\$1.1	\$5.0	\$9.1	\$20.8	-3.7%
2012	\$1.2	\$2.9	\$1.5	\$1.1	\$4.9	\$9.9	\$21.6	-0.7%
2011	\$1.2	\$2.8	\$1.4	\$1.1	\$4.8	\$10.5	\$21.8	10.1%

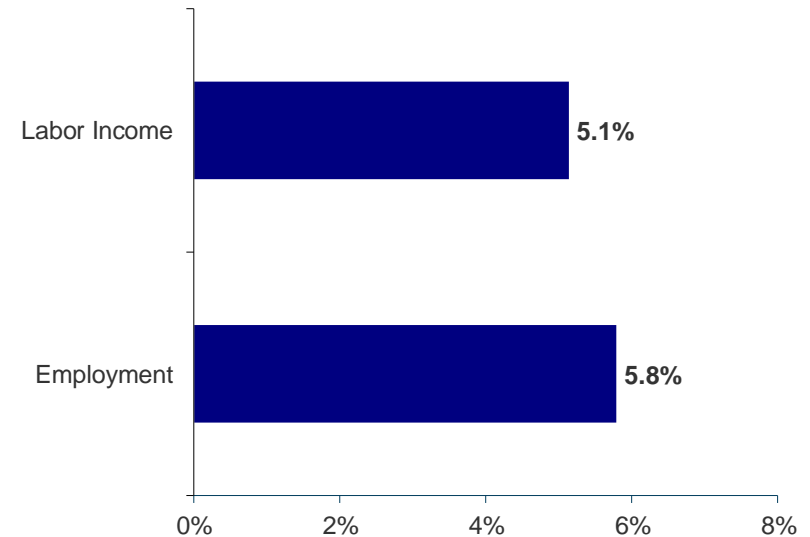
Tourism Industry Sales



Somerset County, Tourism Impact

Somerset County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	202	390	0.18%	
2014	192	374	0.18%	
2013	197	379	0.18%	
2012	200	379	0.18%	
2011	199	376	0.19%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$5.8	\$15.2	0.16%	
2014	\$5.5	\$14.3	0.16%	
2013	\$5.7	\$14.3	0.17%	
2012	\$5.6	\$13.9	0.17%	
2011	\$5.4	\$13.4	0.18%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$3.3	\$3.3	\$0.06	\$6.6
2014	\$3.1	\$3.1	\$0.06	\$6.2
2013	\$3.0	\$3.0	\$0.06	\$6.0
2012	\$3.0	\$3.0	\$0.05	\$6.0
2011	\$2.9	\$3.0	\$0.05	\$5.9

Tourism Share of County Economy

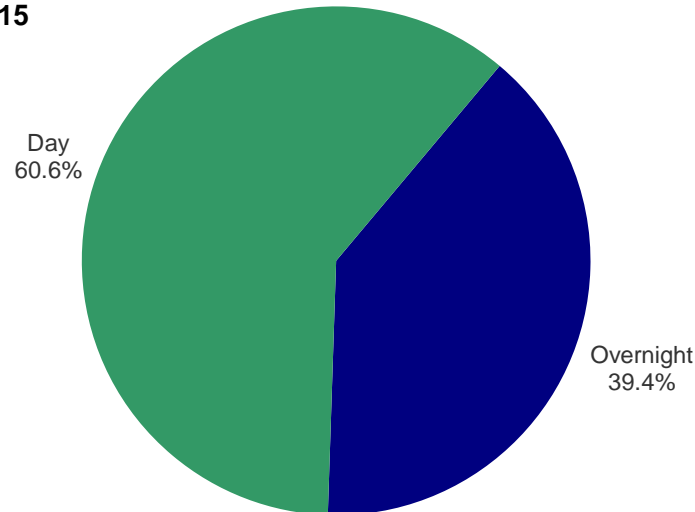


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$23.3	\$25.1
\$21.9	\$23.6
\$20.8	\$22.2
\$21.6	\$23.3
\$21.8	\$23.4

Talbot County, Visitors

Talbot County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	206.7	317.7	524.4	8.5%
2014	188.0	295.4	483.4	0.9%
2013	180.6	298.3	479.0	8.4%
2012	171.3	270.5	441.8	5.9%
2011	163.6	253.5	417.1	-3.8%

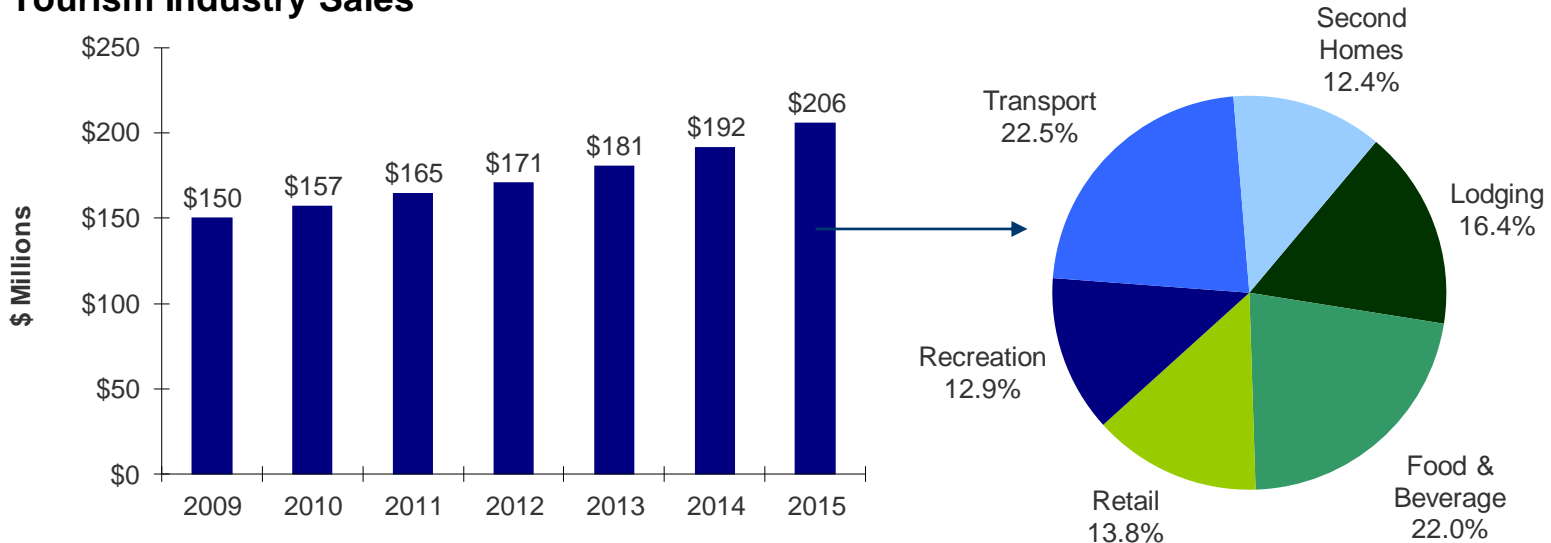
Visits by Type
2015



Talbot County, Industry Sales

Talbot County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$33.8	\$45.3	\$28.4	\$26.5	\$46.4	\$25.5	\$205.9	7.5%
2014	\$31.5	\$41.9	\$27.6	\$25.1	\$43.7	\$21.8	\$191.5	5.9%
2013	\$29.9	\$39.0	\$24.6	\$24.1	\$41.6	\$21.6	\$180.8	5.9%
2012	\$29.2	\$36.6	\$22.4	\$21.4	\$39.6	\$21.7	\$170.8	3.5%
2011	\$27.3	\$33.5	\$20.8	\$21.3	\$37.2	\$24.9	\$165.0	5.0%

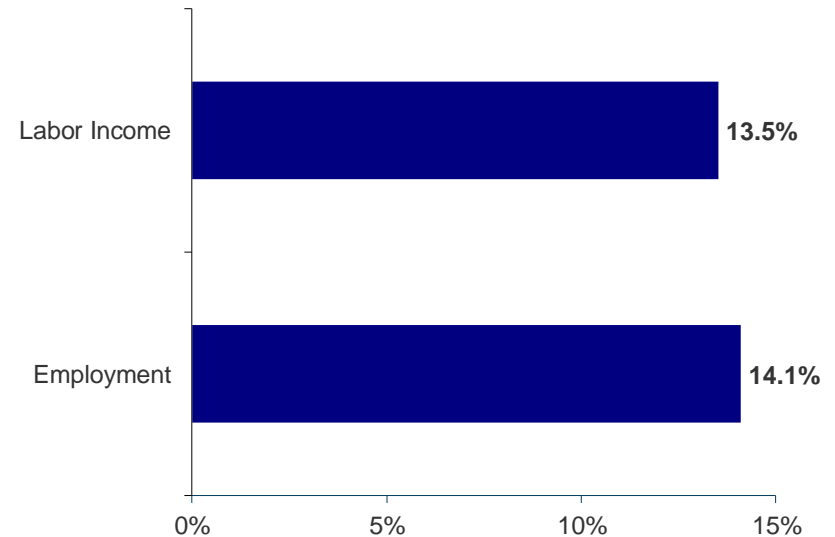
Tourism Industry Sales



Talbot County, Tourism Impact

Talbot County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	1,876	2,648	1.21%	
2014	1,825	2,584	1.21%	
2013	1,850	2,611	1.24%	
2012	1,760	2,485	1.20%	
2011	1,720	2,432	1.21%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$59.9	\$101.3	1.09%	
2014	\$58.4	\$98.2	1.12%	
2013	\$56.8	\$94.7	1.14%	
2012	\$55.9	\$92.4	1.15%	
2011	\$53.6	\$88.8	1.16%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$22.9	\$26.3	\$1.25	\$49.2
2014	\$22.0	\$24.6	\$1.16	\$46.6
2013	\$20.9	\$23.5	\$1.11	\$44.4
2012	\$20.4	\$22.4	\$1.08	\$42.8
2011	\$19.5	\$21.8	\$1.02	\$41.3

Tourism Share of County Economy

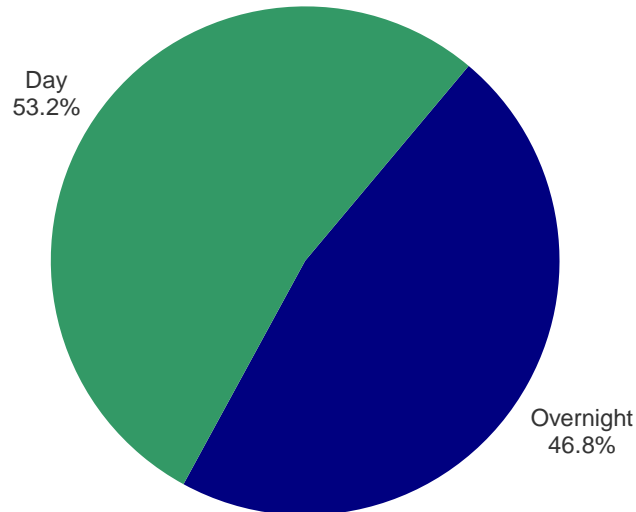


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$205.9	\$222.4
\$191.5	\$206.8
\$180.8	\$192.4
\$170.8	\$183.8
\$165.0	\$177.1

Washington County, Visitors

Washington County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	584.5	663.7	1,248.2	5.0%
2014	560.7	628.4	1,189.0	2.3%
2013	531.3	631.4	1,162.8	5.9%
2012	499.6	598.6	1,098.3	6.8%
2011	464.8	563.9	1,028.7	1.9%

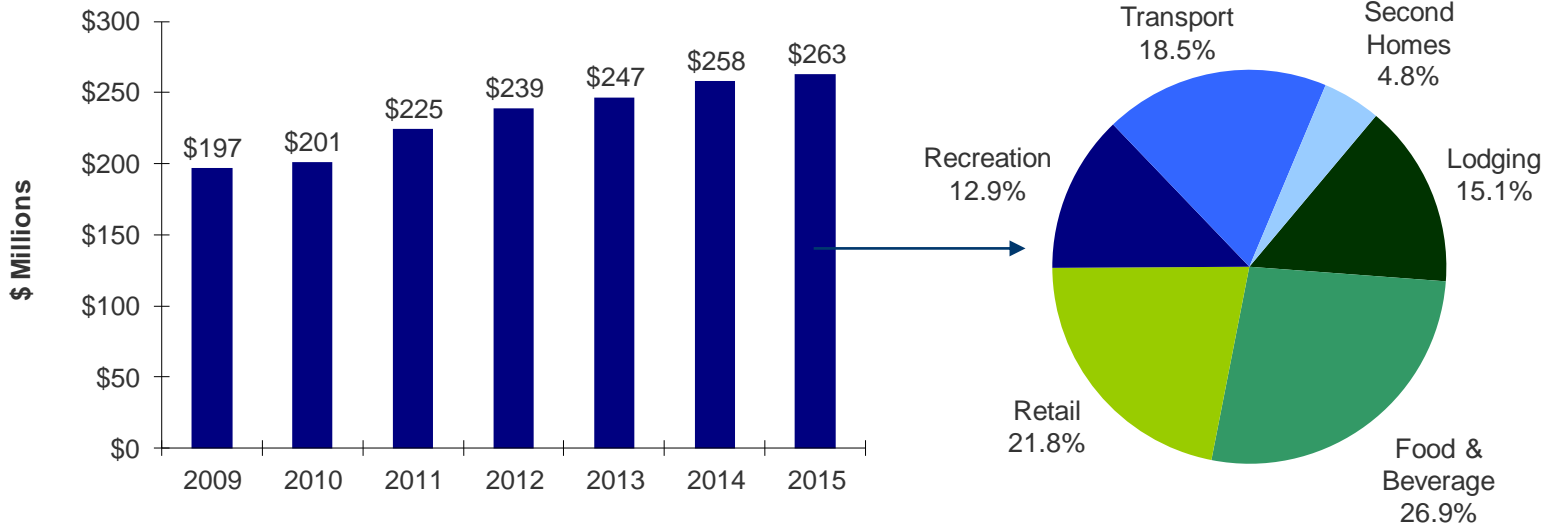
Visits by Type
2015



Washington County, Industry Sales

Washington County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$39.7	\$70.8	\$57.5	\$34.1	\$48.7	\$12.6	\$263.3	2.0%
2014	\$39.5	\$68.7	\$59.1	\$31.7	\$46.4	\$12.8	\$258.2	4.7%
2013	\$37.4	\$65.3	\$57.3	\$30.0	\$44.5	\$12.2	\$246.6	3.2%
2012	\$37.8	\$62.1	\$54.9	\$29.0	\$43.8	\$11.4	\$238.9	6.3%
2011	\$35.2	\$57.7	\$53.3	\$28.2	\$40.4	\$9.9	\$224.8	11.8%

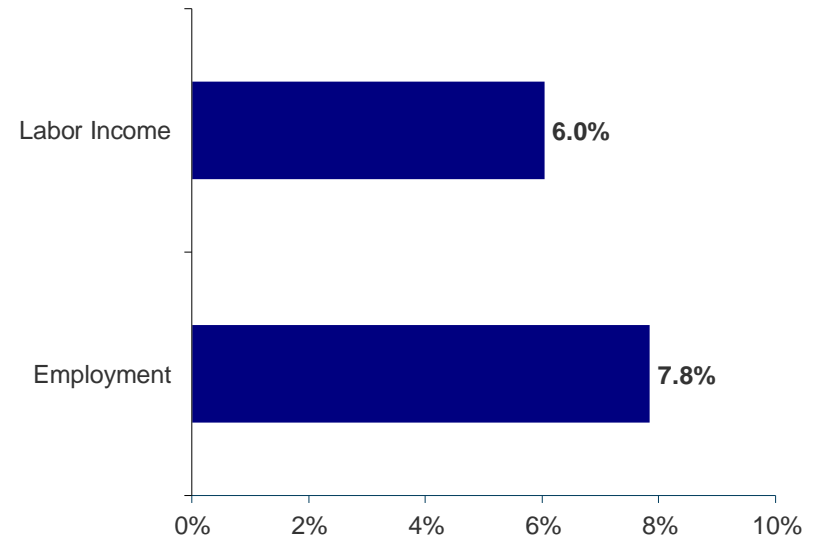
Tourism Industry Sales



Washington County, Tourism Impact

Washington County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	3,428	5,275	2.41%	
2014	3,369	5,193	2.43%	
2013	3,282	5,064	2.40%	
2012	3,283	5,039	2.44%	
2011	3,172	4,881	2.43%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$83.5	\$163.8	1.77%	
2014	\$82.6	\$160.1	1.83%	
2013	\$78.5	\$151.3	1.82%	
2012	\$77.7	\$148.0	1.85%	
2011	\$72.7	\$139.4	1.82%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$35.7	\$38.0	\$2.05	\$73.7
2014	\$34.8	\$37.1	\$1.99	\$71.9
2013	\$32.6	\$35.7	\$1.90	\$68.3
2012	\$32.0	\$34.7	\$1.85	\$66.6
2011	\$30.0	\$32.9	\$1.76	\$62.9

Tourism Share of County Economy

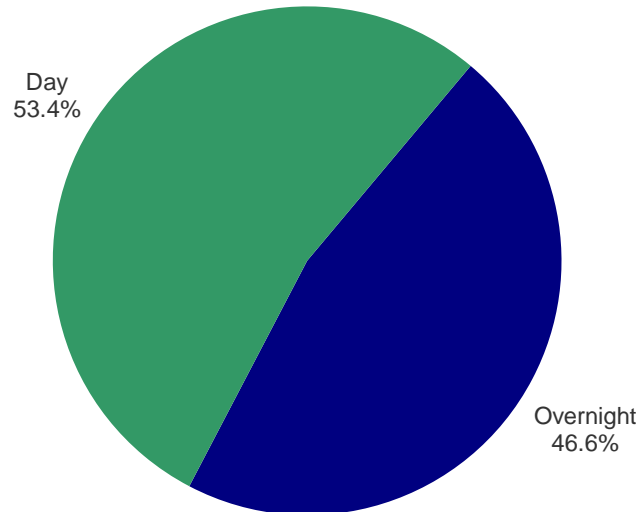


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$263.3	\$284.4
\$258.2	\$278.7
\$246.6	\$262.4
\$238.9	\$257.1
\$224.8	\$241.3

Wicomico County, Visitors

Wicomico County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	398.7	457.7	856.4	6.6%
2014	370.2	433.0	803.2	2.9%
2013	354.0	426.8	780.9	5.5%
2012	336.8	403.5	740.3	3.5%
2011	324.6	390.3	714.9	-0.2%

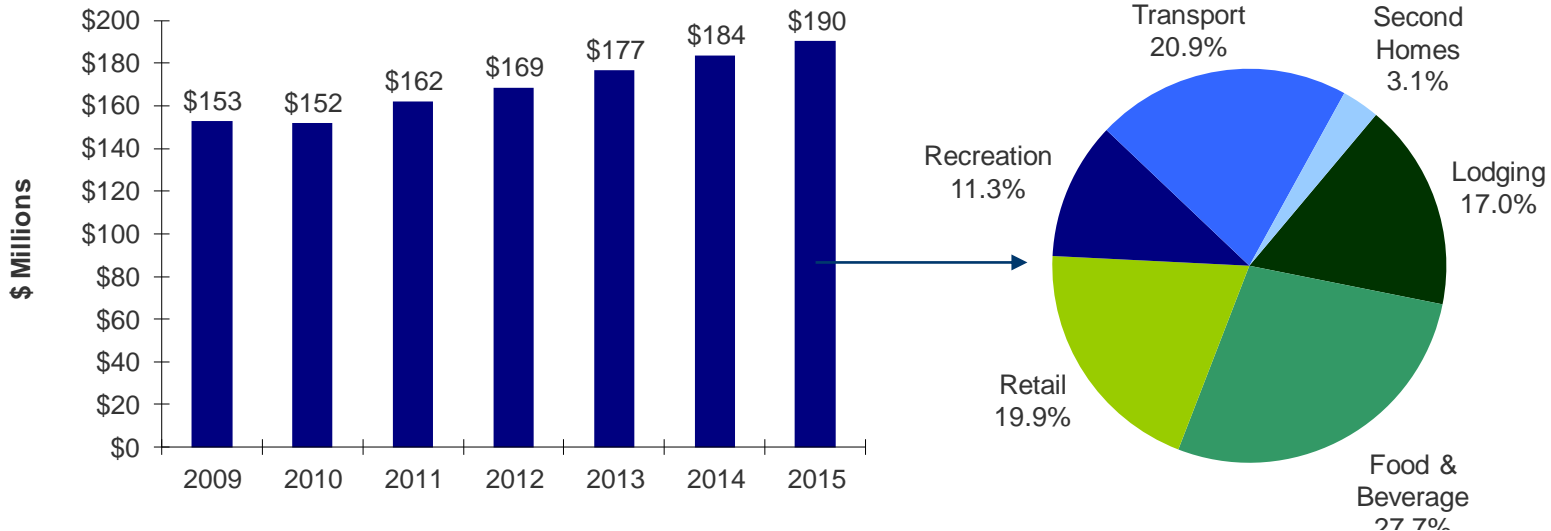
Visits by Type
2015



Wicomico County, Industry Sales

Wicomico County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$32.4	\$52.8	\$37.9	\$21.5	\$39.8	\$5.9	\$190.5	3.7%
2014	\$30.9	\$49.2	\$38.5	\$21.5	\$37.9	\$5.8	\$183.7	3.9%
2013	\$29.1	\$46.5	\$37.8	\$20.7	\$36.3	\$6.3	\$176.7	4.8%
2012	\$28.3	\$42.8	\$35.9	\$19.0	\$33.9	\$8.8	\$168.6	4.0%
2011	\$26.6	\$39.9	\$34.8	\$18.3	\$32.3	\$10.2	\$162.1	6.7%

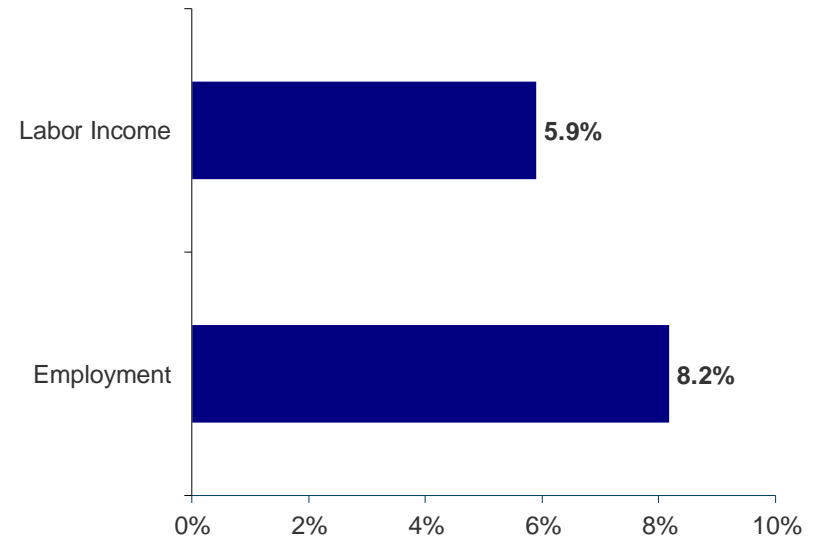
Tourism Industry Sales



Wicomico County, Tourism Impact

Wicomico County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	2,396	3,663	1.68%	
2014	2,336	3,583	1.68%	
2013	2,238	3,444	1.63%	
2012	2,158	3,323	1.61%	
2011	2,027	3,144	1.57%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$55.0	\$108.3	1.17%	
2014	\$53.8	\$104.9	1.20%	
2013	\$52.1	\$100.6	1.21%	
2012	\$49.9	\$95.8	1.20%	
2011	\$45.7	\$88.8	1.16%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$23.9	\$26.9	\$1.44	\$50.8
2014	\$23.1	\$25.8	\$1.33	\$48.9
2013	\$22.0	\$25.0	\$1.27	\$46.9
2012	\$21.0	\$24.0	\$1.21	\$44.9
2011	\$19.5	\$23.2	\$1.17	\$42.6

Tourism Share of County Economy

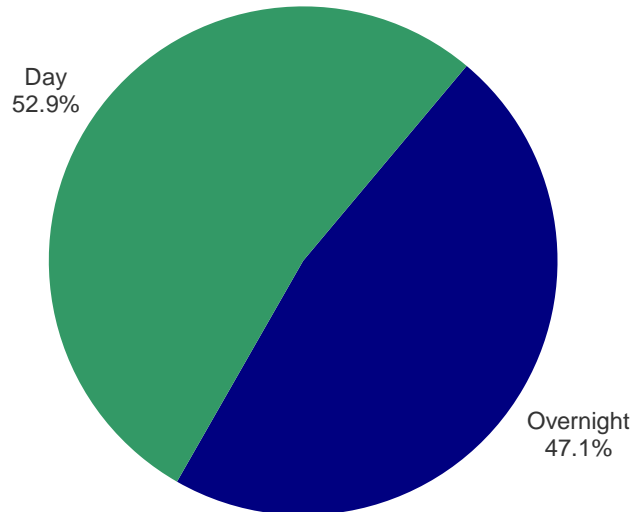


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$190.5	\$205.7
\$183.7	\$198.3
\$176.7	\$188.0
\$168.6	\$181.5
\$162.1	\$174.0

Worcester County, Visitors

Worcester County				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	1,035.7	1,161.0	2,196.7	8.3%
2014	942.7	1,085.0	2,027.7	3.0%
2013	902.4	1,065.9	1,968.3	7.4%
2012	867.8	964.6	1,832.4	4.4%
2011	824.0	931.9	1,755.9	-3.2%

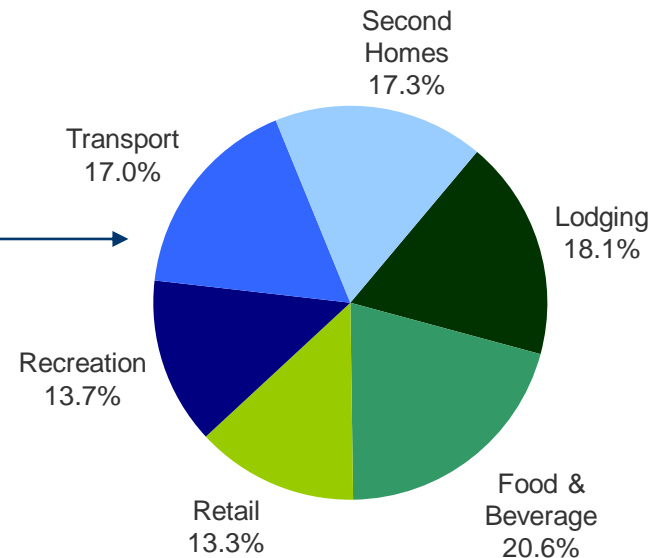
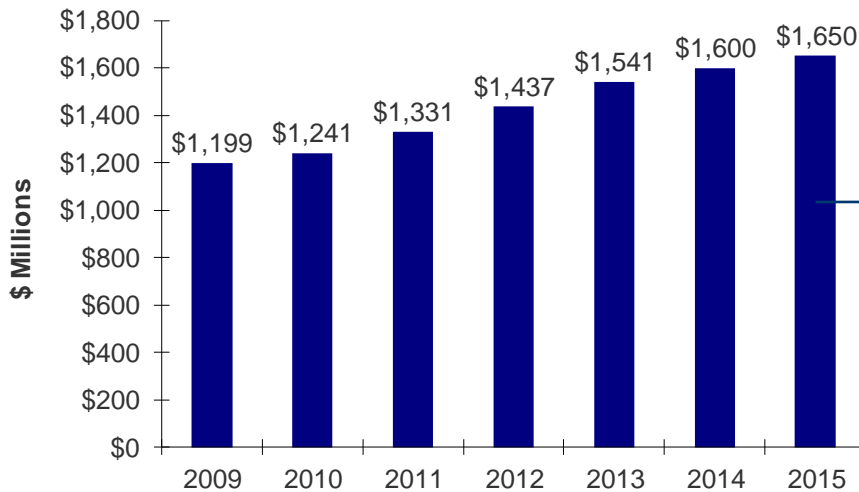
Visits by Type
2015



Worcester County, Industry Sales

Worcester County								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$298.6	\$339.6	\$220.0	\$226.1	\$280.8	\$285.4	\$1,650.5	3.1%
2014	\$289.4	\$321.2	\$219.8	\$217.6	\$275.0	\$277.6	\$1,600.4	3.9%
2013	\$276.0	\$304.5	\$209.3	\$209.9	\$272.6	\$268.6	\$1,540.9	7.2%
2012	\$269.3	\$280.3	\$192.2	\$194.4	\$250.4	\$250.6	\$1,437.1	8.0%
2011	\$251.4	\$257.9	\$178.9	\$190.4	\$231.7	\$220.7	\$1,331.0	7.3%

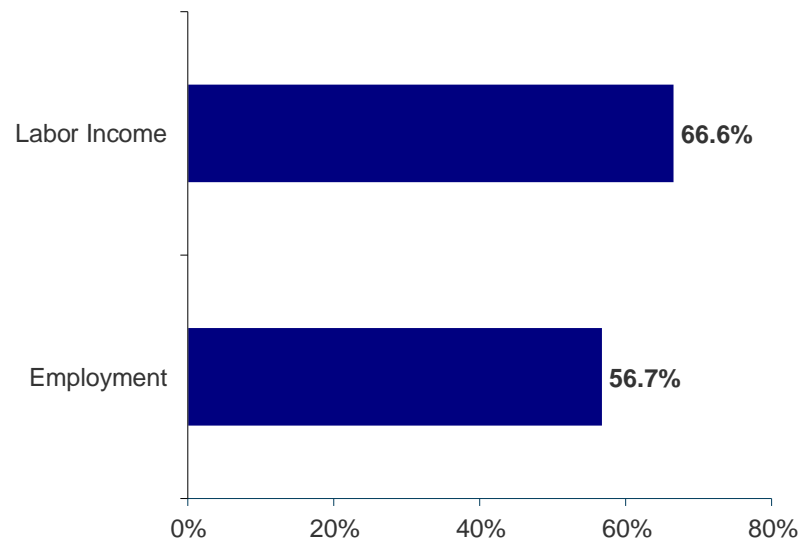
Tourism Industry Sales



Worcester County, Tourism Impact

Worcester County				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	10,304	13,621	6.23%	
2014	9,921	13,158	6.15%	
2013	10,132	13,408	6.34%	
2012	9,812	12,965	6.28%	
2011	9,349	12,380	6.17%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$324.7	\$511.9	5.52%	
2014	\$311.5	\$489.1	5.58%	
2013	\$300.6	\$469.2	5.65%	
2012	\$287.4	\$445.3	5.57%	
2011	\$267.7	\$416.1	5.43%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$127.8	\$196.8	\$15.12	\$324.6
2014	\$122.1	\$189.8	\$14.40	\$312.0
2013	\$116.5	\$184.1	\$13.88	\$300.6
2012	\$110.3	\$173.5	\$13.45	\$283.8
2011	\$102.4	\$163.3	\$12.86	\$265.8

Tourism Share of County Economy

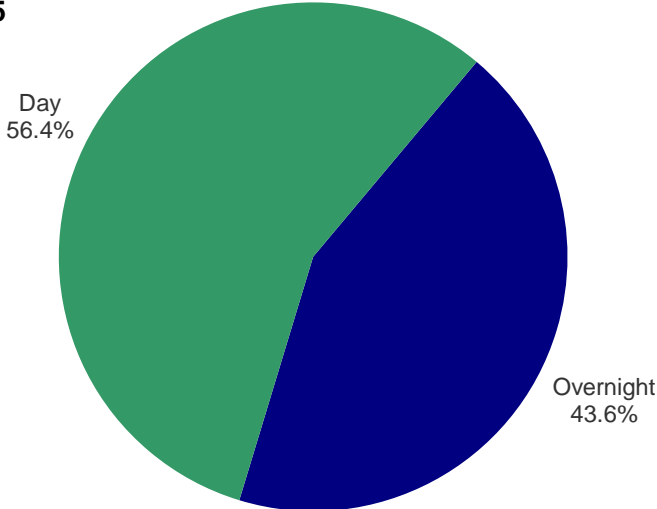


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$1,650.5	\$1,782.9
\$1,600.4	\$1,727.8
\$1,540.9	\$1,639.7
\$1,437.1	\$1,546.8
\$1,331.0	\$1,428.5

Baltimore City, Visitors

Baltimore City				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	2,491.7	3,226.1	5,717.9	1.9%
2014	2,423.2	3,186.1	5,609.3	2.1%
2013	2,438.7	3,055.6	5,494.4	5.6%
2012	2,383.9	2,819.8	5,203.7	4.1%
2011	2,274.8	2,725.0	4,999.8	3.0%

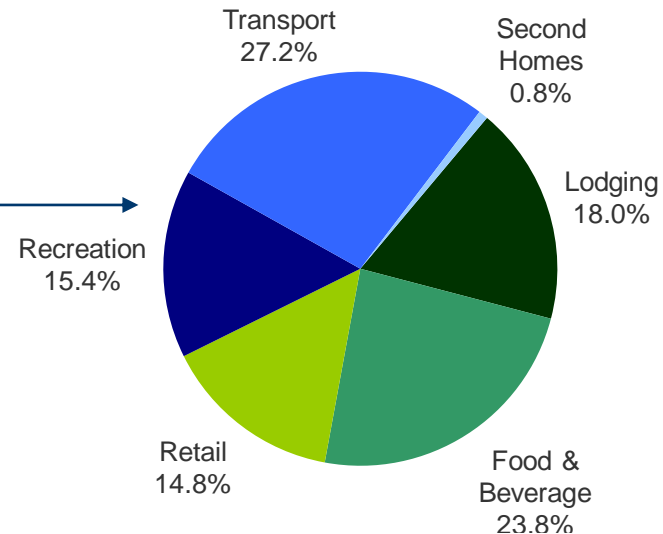
**Visits by Type
2015**



Baltimore City, Industry Sales

Baltimore City								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$397.1	\$526.2	\$326.8	\$341.1	\$601.5	\$17.1	\$2,209.8	1.0%
2014	\$397.1	\$509.3	\$342.1	\$319.4	\$602.2	\$17.2	\$2,187.3	6.6%
2013	\$375.6	\$476.9	\$325.0	\$271.7	\$584.3	\$18.1	\$2,051.7	4.8%
2012	\$370.3	\$446.5	\$309.2	\$261.6	\$554.1	\$16.3	\$1,957.9	7.9%
2011	\$343.6	\$407.3	\$288.4	\$243.0	\$519.4	\$13.1	\$1,814.8	8.9%

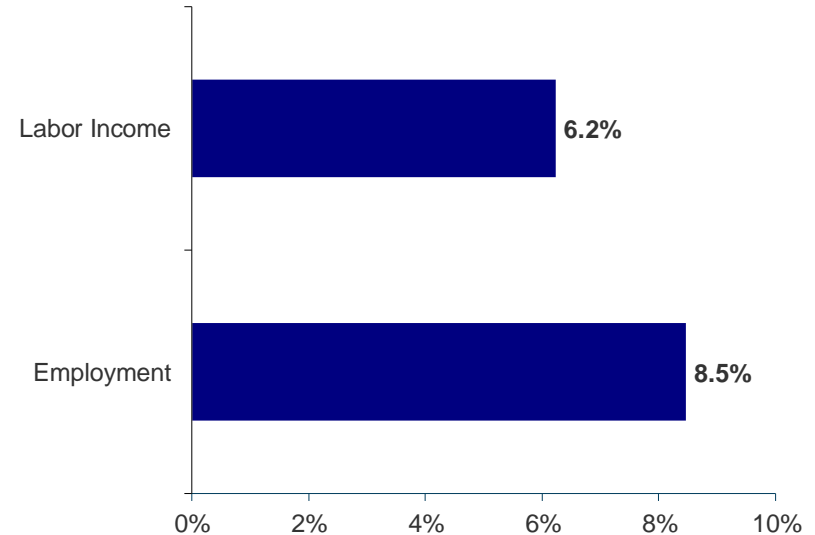
Tourism Industry Sales



Baltimore City, Tourism Impact

Baltimore City				
Tourism Employment				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	18,974	28,309	12.95%	
2014	18,916	28,228	13.20%	
2013	18,334	27,394	12.96%	
2012	18,001	26,837	13.00%	
2011	17,040	25,535	12.72%	
Tourism Labor Income, (millions)				
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)	
2015	\$745.8	\$1,295.3	13.98%	
2014	\$698.9	\$1,211.0	13.82%	
2013	\$655.5	\$1,131.7	13.62%	
2012	\$631.6	\$1,082.8	13.54%	
2011	\$580.7	\$1,002.6	13.09%	
Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$285.0	\$308.1	\$32.93	\$593.1
2014	\$268.0	\$301.8	\$31.51	\$569.8
2013	\$248.2	\$286.8	\$30.81	\$534.9
2012	\$238.0	\$277.2	\$31.43	\$515.2
2011	\$219.5	\$261.1	\$29.86	\$480.6

Tourism Share of County Economy

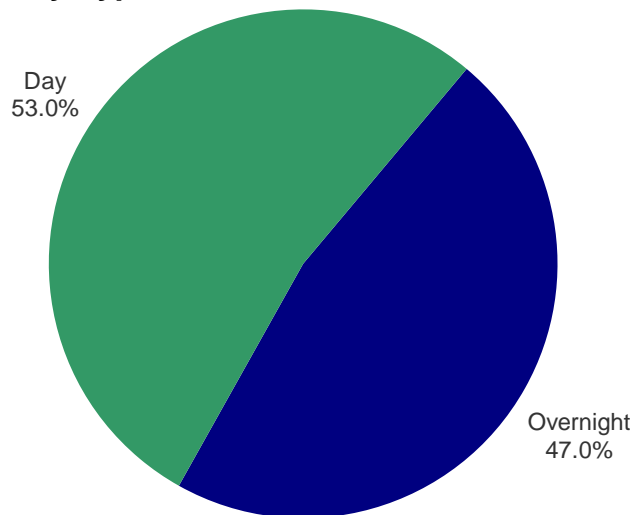


Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$2,209.8	\$2,387.1
\$2,187.3	\$2,361.3
\$2,051.7	\$2,183.3
\$1,957.9	\$2,107.3
\$1,814.8	\$1,947.7

Ocean City, Visitors

Ocean City				
	Visitors (thousands)			
Year	Overnight	Day	Total	Growth Rate
2015	918.0	1,034.7	1,952.7	8.8%
2014	831.3	963.9	1,795.2	2.1%
2013	798.1	960.4	1,758.6	8.0%
2012	766.0	862.4	1,628.4	2.9%
2011	726.6	855.8	1,582.4	-4.7%

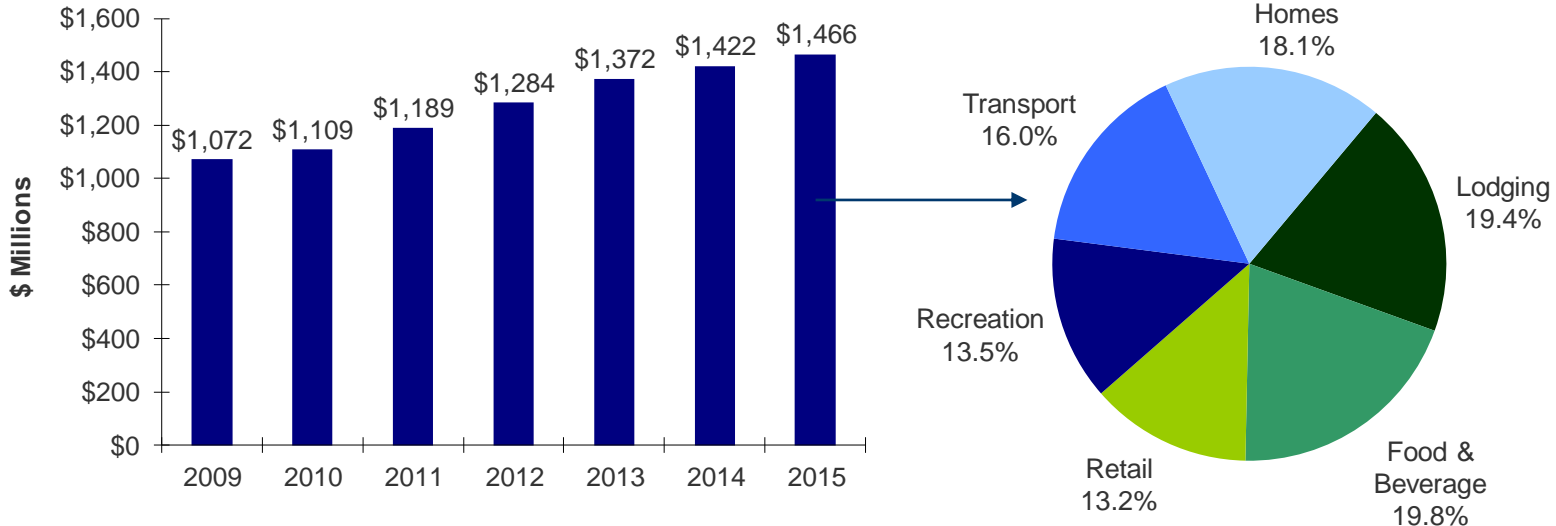
Visits by Type
2015



Ocean City, Industry Sales

Ocean City								
Tourism Industry Sales, (millions)								
Year	Lodging	Food & Beverage	Retail	Recreation	Transport	Second Homes	Total	Growth Rate
2015	\$284.6	\$290.2	\$194.2	\$197.6	\$234.4	\$265.2	\$1,466.2	3.1%
2014	\$275.8	\$274.5	\$193.9	\$190.2	\$229.5	\$258.0	\$1,421.9	3.7%
2013	\$263.9	\$260.9	\$185.2	\$183.9	\$228.1	\$249.6	\$1,371.7	6.8%
2012	\$258.4	\$240.8	\$170.6	\$170.9	\$210.3	\$232.8	\$1,283.8	8.0%
2011	\$241.2	\$221.5	\$158.8	\$167.4	\$194.6	\$205.1	\$1,188.6	7.1%

Tourism Industry Sales



Ocean City, Tourism Impact

Ocean City			
Tourism Employment			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	8,924	10,772	4.93%
2014	8,580	10,384	4.86%
2013	8,772	10,598	5.02%
2012	8,498	10,255	4.97%
2011	8,106	9,796	4.88%

Tourism Labor Income, (millions)			
Year	Direct	Total (Dir, Ind, Induced)	Share of State (Total)
2015	\$279.8	\$384.1	4.15%
2014	\$267.3	\$366.2	4.18%
2013	\$257.8	\$351.8	4.23%
2012	\$246.6	\$334.6	4.18%
2011	\$229.7	\$312.4	4.08%

Total Tourism Tax Receipts (millions)				
Year	Federal	State and Local	Hotel	Total
2015	\$100.3	\$173.8	\$14.51	\$274.2
2014	\$95.8	\$167.5	\$13.73	\$263.4
2013	\$91.6	\$162.9	\$13.27	\$254.5
2012	\$86.8	\$153.9	\$12.87	\$240.8
2011	\$80.6	\$145.0	\$12.32	\$225.7

Tourism Sales (millions)	
Tourism Industry	Tourism Economy
\$1,466.2	\$1,583.8
\$1,421.9	\$1,535.0
\$1,371.7	\$1,459.6
\$1,283.8	\$1,381.7
\$1,188.6	\$1,275.6

Impact results in context



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Tourism visitation and spending in context

- The 41.1 million visitors would be like having everyone from Pennsylvania, New York and Virginia, visiting Maryland once in 2015.
- Maryland hosts an average of 112,500 visitors per day – twice the population of Towson, MD EACH DAY.
- \$16.9 billion in visitor spending is larger than the spending of ALL Americans on Easter.
- If Maryland tourism was a company, it would rank 168th (up 20 spots!) on the Fortune 500 list, around the same size as Bristol-Myers Squibb.
- Visitor spending increased \$550 million between 2014 and 2015, nearly twice as large as the estimated cost of the I-895 Canton Viaduct (\$290 million and spread over 5 years).

Tourism impacts in context

- Were the 143,625 direct tourism workers not employed, the unemployment rate in 2015 would have been 9.7% in Maryland, 4.5 percentage points higher than the actual rate.
- The nearly 218,500 jobs supported by tourism is similar to the total jobs in BOTH Frederick and Carroll Counties.
- Each household in Maryland would need to be taxed an additional \$1,040 per year to replace the tourism taxes received by state and local governments.
- With the average American spending \$830 on Christmas in 2016, the savings from tourism would pay all those pesky Xmas bills in January with enough left over for Valentine's Day.

Methodology and Background



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Methods and data sources

- Domestic visitor expenditure estimates are provided by DK Shifflet representative survey of US travelers. These are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by length of stay (day and overnight).
- Tourism Economics then adjusts these levels of spending based on a range of known measures of tourism activity:
 - Overseas visitor spending (source: NTTO, TE)
 - Canada visitor spending (source: Statistics Canada, TE)
 - Bed tax receipts
 - Sales tax by sector
 - Spending on air travel which accrues to all airports and locally-based airlines
 - Gasoline purchases by visitors (source: TE calculation)
 - Smith Travel Research data on hotel revenues
 - Construction Value by McGraw-Hill Construction
 - Industry data on employment, wages, GDP, and sales (source: BEA, BLS, Census)

Methods and data sources

- An IMPLAN model was compiled for the State of Maryland. This traces the flow of visitor-related expenditures through the local economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of tourism.
- All results are benchmarked and cross-checked and adjusted based on the following:
 - US Bureau of Labor Statistics and Bureau of Economic Analysis (employment and wages by industry)
 - US Census (business sales by industry)
- The source of the employment and wage data is the Regional Economic Information System (REIS), Bureau of Economic Analysis, U.S. Department of Commerce. All employment rankings are based on Bureau of Labor Statistics (ES202/QCEW) data.

About Tourism Economics

- Tourism Economics, headquartered in Philadelphia, is an Oxford Economics company dedicated to providing high value, robust, and relevant analyses of the tourism sector that reflects the dynamics of local and global economies. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, project feasibility analysis, tourism forecasting models, tourism policy analysis, and economic impact studies.
- Our staff have worked with over 300 destinations to quantify the economic value of tourism, forecast demand, guide strategy, or evaluate tourism policies.
- Oxford Economics is one of the world's leading providers of economic analysis, forecasts and consulting advice. Founded in 1981 as a joint venture with Oxford University's business college, Oxford Economics is founded on a reputation for high quality, quantitative analysis and evidence-based advice. For this, it draws on its own staff of 150 highly-experienced professional economists; a dedicated data analysis team; global modeling tools; close links with Oxford University, and a range of partner institutions in Europe, the US and in the United Nations Project Link.
- For more information: info@tourismeconomics.com.



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