

Maryland Tourism Monitor

Recap of Maryland's travel & tourism trends, monitored by the Office of Tourism Development (Data for FY2016 through Dec. 31)

Requests for Travel Information

OTD receives requests for travel kits in response to print, radio and TV advertising. To date, OTD has spent 17.7 percent less on print advertising than last year and there was a 2.9 percent decrease in advertising requests. Broadcast requests also decreased with the decrease in dollars allocated to broadcast advertising.

Request Type	FY2016 YTD	FY2015 YTD	Change
Print advertising requests	11,292	11,624	(2.9%)
Print ad budget	\$48,403	\$58,802	(17.7%)
Broadcast leads	1,752	2,551	(31.3%)
Broadcast ad budget	\$454,549	\$535,866	(15.2%)

Website Visitation

More than 4,500 requests for travel kits have been received via the website. Website visitation due to advertising has increased 11.1 percent while the online advertising budget for FY2016 through December 2015 is approximately 20 percent lower than last year; overall advertising expenditures – online, print and broadcast – is approximately 17 percent lower year over year. Total traffic has decreased 45.7 percent, however website visitation has been accelerating over the past several weeks and continues to improve.

Request Type	FY 2016 YTD	FY 2015 YTD	Change
Website unique visitors*	905,041	1,667,923	(45.7%)
Web advertising clicks	555,958	500,609	11.1%
Online advertising budget	\$187,378	\$234,587	(20.1%)
Web travel kit requests	4,613	10,949	(57.9%)

* 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, www.fishandhuntmaryland.com.

Communications Efforts

Thus far in FY2016, communications activities such as press outreach, familiarization tours and visiting journalists generated \$1,932,353 in advertising value for Maryland tourism, film, & the fine arts products and services. This is an increase over previous years with the exception of years with associated Star Spangled events. During FY15, through December 31st, communications activities yielded \$7,546,272.

Social Media

The number of *TravelMD* Facebook fans has grown 17.9 percent this year compared to FY2015. OTD Twitter followers have grown almost 27.3 percent

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. Facebook continues to generate the most social referral traffic with 56.8% of sessions followed by: twitter (25%), TripAdvisor (12.1%), & Pinterest (2%). **

	FY2016 YTD	FY2015 YTD	Change
Facebook fans	27,815	23,595	17.9%
Twitter followers	33,823	26,562	27.3%

**The previous months monitor reported an erroneous number of referral traffic due to how traffic was calculated between sites. Facebook has generated more than 7,134 referrals through 12/31 and twitter: 3,310. Source: Google Analytics

Newsletters

Consumer – 135,170 prospective visitors received the e-newsletter in December 2016. The number of subscribers decreased 5.3 percent from last year.

Industry – The Division of Tourism, Film, and the Arts sent the *Insights* industry newsletter to 8,063 subscribers in December 2016 – 2.4 less than the previous year.

Welcome Centers

Welcome Centers across the state have seen a moderate increase in visitors thus far through FY16 when compared to FY15; this can be correlated to the re-opening of the two new centers. There have been 169,858 visitors to the welcome centers through the end of December versus 168,228 the previous year, representing an increase of approximately one percent. Kiosk usage at the I-70E/W terminals has also been improving since repairs were completed with 121 sessions in December 2015, versus 51 in December 2016.

Amtrak

The Amtrak train system in Maryland recorded 462,200 non-commuter arrivals in Fiscal Year 2016. This represents a 4.1 percent decrease year over year.

BWI Airport

BWI served more than 6 million domestic passenger arrivals and more than 300,000 international arrivals in FY2016 through December 31. Total arrivals and international arrivals increased 9.0 and 35.6 percent respectively compared to last year.

Leisure and Hospitality Employment

In December, 2015 employment in Maryland's Leisure and Hospitality sector increased nearly 3.6 percent compared to last year. At the national level, employment during the same month in these three industries saw an overall increase of 3.3 percent.

	Dec 2015	Dec 2014	Change
Arts, Entertainment, Recreation	43,100	37,200	15.9%
Accommodation	21,200	23,600	(10.2%)
Food Services	194,600	189,200	2.9%
Total	258,900	250,000	3.6%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in December, 2015 increased 2.0 percent, while room revenue increased 0.8 percent. At the national level, the number of rooms sold increased by 2.3 percent and room revenue grew 4.7 percent.

Gaming Revenue (in millions)

FY2016 has yielded over \$562 million in revenue, an increase of 12.2 percent compared to last year's \$501.7 million through December 31.

Gaming Facility	FY2016 YTD (in millions)	FY2015 TYD (in millions)	Change
Perryville, VLT	\$32.4	\$33.2	(2.6%)
Perryville, Table	\$5.9	\$5.9	1.0%
Maryland Live, VLT	\$207.0	\$198.1	4.5%
Maryland Live, Table	\$112.5	\$117.3	(4.1%)
Ocean Downs, VLT	\$30.6	\$27.8	9.9%
Rocky Gap, VLT	\$20.7	\$19.3	7.4%
Rocky Gap, Table	\$3.2	\$3.1	0.8%
Horseshoe VLT	\$80.9	\$55.0	47.1%
Horseshoe Table	\$69.7	\$41.9	66.5%
Combined Total	\$562.9	\$501.7	12.2%

Source: Maryland Lottery, Figures are rounded to the nearest one decimal while % change is based on the complete figure.

Tourism Sales Tax Revenues

Tourism-related tax codes increased 10.5 percent while overall sales tax collections over the same time period grew 3.4 percent. Adjusted tourism tax codes – the amount deemed attributable to tourism by the Comptroller has grown over \$21 million year over year.

Sales Tax Category	TOTAL SALES TAX REVENUES (\$)			Factor	TOURISM TAX REVENUES (\$)		
	FY2016 YTD	FY 2015 YTD	%Change		FY2016 YTD	FY 2015 YTD	% Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL*	\$195,101,211	\$179,082,703	8.9%	33%	\$65,033,723	\$59,694,234	8.9%
111 Hotels, Motels Selling Food - W/BWL*	\$23,726,793	\$22,993,498	3.2%	100%	\$23,726,833	\$22,993,498	3.2%
112 Restaurants and Night Clubs - W/BWL*	\$136,346,867	\$130,844,981	4.2%	33%	\$45,378,206	\$43,614,994	4.2%
306 General Merchandise	\$130,286,922	\$110,333,689	18.1%	5%	\$6,514,346	\$5,516,684	18.1%
407 Automobile, Bus and Truck Rentals**	\$37,426,084	\$34,809,858	7.5%	90%	\$32,512,175	\$31,328,873	7.5%
706 Airlines - Commercial	\$395,053	\$262,519	50.5%	50%	\$197,526	\$131,260	50.5%
901 Hotels, Motels, Apartments, Cottages	\$63,128,355	\$52,298,861	20.7	100%	\$63,128,355	\$52,298,861	20.7
925 Recreation and Amusement Places	\$4,944,322	\$4,366,926	13.2%	50%	\$2,472,160	\$2,183,463	13.2%
Tourism Tax Categories Subtotal	\$591,355,610	\$534,993,036	10.5%	-	\$238,855,655	\$217,761,867	9.7%
All Sales Tax Categories Subtotal	\$2,342,984,191	\$2,265,571,000	3.4%				