

# Maryland Tourism Monitor

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

## Consumer Interactions

### Print:

Through the first quarter of FY17, both print and broadcast leads are showing signs of improvement despite lower media spends. Broadcast leads are now outperforming year over year by more than 5 percent while print advertising requests are now only down approximately 11 percent compared to last months nearly 20 percent.

Request Type	FY 2017 YTD	FY 2016 YTD	Change
Print advertising requests	6,826	7,652	(10.8%)
Print ad budget	\$3,133	--	--
Broadcast leads	951	902	5.4%
Broadcast ad budget	\$68,722	--	--

### Web:

Web visitation through the first three months of FY17 continues to see significant strength in website visits – primarily driven by traffic to VisitMaryland.Org. Total unique traffic is up 69.7 percent when compared year over year. The disparity (minus 79.4 percent) in web advertising clicks is due to no online advertising being run at the beginning of FY17 until late August, early September.

Interaction Type	FY 2017 YTD	FY 2016 YTD	Change
Website unique visitors*	909,190	535,864	69.7%
Web advertising clicks	98,693	479,899	(79.4%)
Web travel kit requests	3,451	3,160	9.2%
Online advertising budget	\$35,648	--	--

\* The performance measure includes the following web sites: [www.visitmaryland.org](http://www.visitmaryland.org), [www.visitmd.mobi](http://www.visitmd.mobi), [www.SS200.com](http://www.SS200.com), [www.SS200.org](http://www.SS200.org), [www.keycam.com](http://www.keycam.com), [www.1821battles.com](http://www.1821battles.com), [www.1821battles.mobi](http://www.1821battles.mobi), [www.industry.visitmaryland.org](http://www.industry.visitmaryland.org), [www.fishandhuntmaryland.com](http://www.fishandhuntmaryland.com).

## Communications Efforts

Through the first three months of FY17, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$185,000 in advertising value for Maryland tourism products and services.

Each month we will also report the M3 measurement. For September 2016, these were: Message (2.1), Tonality (2.9), Graphic (1.1), Outlet Tier (1.3), Geographic Market (1.4), & OTD initiative (1.5) – for a total of 10.4 out of 18\*

\* Each category is graded on a scale of 1-3 for a Maximum total of 18.

## Social Media

The number of *TravelMD* Facebook fans has grown 28.4 percent this fiscal year compared to last. OTD Twitter followers have grown 15.9 percent.

During September, 30 Facebook posts reached an audience of 230,300 people, 27 tweets received 95,500 impressions, and 51 Instagram posts yielded 1,400 new followers.

	FY 2017 YTD	FY 2016 YTD	Change
Facebook fans	34,163	26,598	28.4%
Twitter followers	37,677	32,499	15.9%

## Partner Referrals & Outbound Clicks

Through the first three months of FY17, more than 100,000 outbound links have been navigated by visitors from VisitMaryland.org to our Partners. Events remain the number one outbound link category, followed by attractions and accommodations.

Category	Monthly Clicks	Clicks FYTD
Events	18,485	50,234
Attractions	5,387	25,401
Accommodations	3,392	15,990
Dining	1,369	5,816
Arts & Culture	751	2,585
Golf	94	303
Shopping	104	337
Entertainment/Nightlife	26	91
Parks, Nature, Scenic	27	85

## Welcome Centers

During September 2017, 36,723 visitors passed through Maryland's welcome centers and more than 116,000 have during this fiscal year – a 23.7 percent increase compared to FY16.

Kiosks at the I-70 Welcome Centers recorded have recorded 1,056 unique hits during this fiscal year – an increase of more than 100 percent compared to FY16's 511 hits.

## Amtrak

The Amtrak train system in Maryland recorded 80,900 non-commuter arrivals during September. Through the first quarter of FY17 – Amtrak numbers remain strong in year over year comparison, up approximately 6 percent.

### BWI Airport

More than 3.3 million passengers arrived at BWI airport through the first three months of FY17. When compared to the same time period the previous year, which had approximately 3.2 million arrive, this represents a 3.4% increase.

### Leisure and Hospitality Employment

Employment in Maryland’s Leisure and Hospitality sector grew 3.9 percent in September compared to last year. Maryland outperformed the national statistic; employment in these three industries saw an overall increase of 2.2 percent.

	September 2016	September 2015	Change
Arts, Entertainment, Recreation	49,800	49,500	0.6%
Accommodation	25,200	24,400	3.3%
Food Services	208,600	199,100	4.8%
<b>Total</b>	<b>283,600</b>	<b>273,000</b>	<b>3.9%</b>

### Tourism Sales Tax Revenues

The first quarter of FY17 has seen continued gains year over year in overall Tourism Tax Code Revenue. Tourism Tax categories increased 3.2% while all sales tax contributions only rose 2.2%. Tourism Tax Codes, the amount deemed attributable by the Comptroller, rose 3.0%

TOTAL SALES TAX REVENUES (\$)				TOURISM TAX REVENUES (\$)			
Sales Tax Category	FY 2017 YTD	FY 2016 YTD	% Change	Factor	FY 2017 YTD	FY 2016 YTD	% Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL	\$101,659,250	\$99,548,922	2.1%	33%	\$33,886,417	\$33,182,740	2.1%
111 Hotels, Motels Selling Food - W/BWL	\$12,027,403	\$12,442,032	(3.3%)	100%	\$12,027,403	\$12,442,032	(3.3%)
112 Restaurants and Night Clubs - W/BWL	\$72,015,151	\$70,768,041	1.8%	33%	\$24,005,050	\$23,589,347	1.8%
306 General Merchandise	\$66,779,842	\$62,856,755	6.2%	5%	\$3,338,992	\$3,142,837	6.2%
407 Automobile, Bus and Truck Rentals	\$19,591,433	\$19,720,054	(0.7%)	90%	\$17,632,290	\$16,576,748	(0.7%)
706 Airlines - Commercial	\$112,288	\$192,095	(41.5%)	50%	\$56,144	\$96,047	(41.5%)
901 Hotels, Motels, Apartments, Cottages	\$37,261,918	\$34,285,876	8.7%	100%	\$37,261,918	\$34,285,876	8.7%
925 Recreation and Amusement Places	\$2,745,334	\$2,681,921	2.4%	50%	\$1,372,667	\$1,340,960	2.4%
<b>Tourism Tax Categories Subtotal</b>	<b>\$312,192,619</b>	<b>\$302,494,957</b>	<b>3.2%</b>	-	<b>\$129,580,881</b>	<b>\$124,656,590</b>	<b>3.0%</b>
All Sales Tax Categories Subtotal	\$1,171,518,646	\$1,146,222,280	2.2%				

## Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in September 2016 increased 3.6 percent, while room revenue increased 5.4 percent, outpacing the nation. Nationally, room demand increased 1.5 percent while revenue increased a comparable 4.8 percent.

### Gaming Revenue (in millions)

Through September, gaming facilities generated more than \$301 million dollars in revenue, an increase of 6.4 percent from last year’s \$283.1 million.

Gaming Facility	FY 2017 YTD (In millions)	FY 2016 YTD (In millions)	Change
Hollywood, VLT	\$15.8	\$16.7	(5.5%)
Hollywood, Table	\$2.8	\$2.9	(4.1%)
Ocean Downs, VLT	\$18.6	\$18.1	2.5%
Maryland Live, VLT	\$102.5	\$104.0	(1.5%)
Maryland Live, Table	\$67.8	\$54.6	24.1%
Rocky Gap, VLT	\$12.0	\$10.9	10.7%
Rocky Gap, Table	\$2.0	\$1.7	16.9%
Horseshoe, VLT	\$42.8	\$39.8	7.6%
Horseshoe, Table	\$36.8	\$34.3	7.4%
<b>Combined Total</b>	<b>\$301.3</b>	<b>\$283.1</b>	<b>6.4%</b>

Source: Maryland Lottery

