

Maryland Tourism Monitor

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

Consumer Interactions

Print:

Through the four months 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 nearly 40 while print advertising requests continue to catch up to the previous year.

Request Type	FY 2017 YTD	FY 2016 YTD	Change
Print advertising requests	8,200	9,484	(13.5%)
Print ad budget	\$8,313	--	--
Broadcast leads	1,542	1,104	39.7%
Broadcast ad budget	\$293,873	--	--

Web:

Web visitation through the first four months of FY17 continues to see significant strength in website visits – primarily driven by organic traffic to VisitMaryland. Total unique traffic is up near 113 percent year over year. The difference in clicks remains due to starting online campaigns several months into FY17.

Interaction Type	FY 2017 YTD	FY 2016 YTD	Change
Website unique visitors*	1,467,789	689,197	112.9%
Web advertising clicks	137,060	494,286	(72.3%)
Web travel kit requests	4,192	3,766	11.3%
Online advertising budget	\$55,406	--	--

* 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.1821battles.mobi, www.industry.visitmaryland.org, www.fishandhuntmaryland.com.

Communications Efforts

Through the first four months of FY17, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$4 million in advertising value for Maryland tourism products and services, aided by the tremendous success of Fleet Week.

Each month, OTD reports the M3 measurement. For October 2016, these were: Message (2.7), Tonality (3.0), Graphic (2.5), Outlet Tier (1.8), Geographic Market (2.4), & OTD initiative (2.6) – for a total of 15.0 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 29.1 percent this fiscal year compared to last. OTD Twitter followers have grown 14.9 percent.

In October, 53 Facebook posts yielded an increase of 740 fans, 29 tweets (not including retweets) yielded an increase of 219 followers, 36 posts on Instagram yielded an increase of 532 followers.

	FY 2017 YTD	FY 2016 YTD	Change
Facebook fans	34,933	27,068	29.1%
Twitter followers	37,887	32,960	14.9%
Instagram followers	30,866	13,025	137.0%

Partner Referrals & Outbound Clicks

Through the first four months of FY17, more than 125,000 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	15,831	66,065
Attractions	4,936	30,337
Accommodations	2,436	18,426
Dining	1,037	6,853
Arts & Culture	646	3,231
Golf	62	365
Shopping	99	436
Entertainment/Nightlife	24	115
Parks, Nature, Scenic	29	114

Welcome Centers

During October 2016, 37,534 visitors passed through Maryland's welcome centers and more than 153,000 have during this fiscal year – a 19.2 percent increase compared to FY16.

Kiosks at the I-70 Welcome Centers recorded have recorded 1,264 unique hits during this fiscal year – an increase of nearly 75 percent compared to FY16's 723 hits.

Amtrak

The Amtrak train system in Maryland recorded 83,000 non-commuter arrivals during October. Through the first four months of 2017, the Amtrak system continues to out-perform compared to year over year with a 5.1 percent increase in volume.

BWI Airport

More than 4.4 million passengers arrived at BWI airport through October 2017. When compared to the same time period the previous year, this represents nearly a 3 percent rise compared to the previous year.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 1.5 percent in October compared to last year. Maryland performed near the national statistic; employment in these three industries saw an overall increase of 1.7 percent.

	October 2016	October 2015	Change
Arts, Entertainment, Recreation	46,200	47,900	(3.5%)
Accommodation	24,100	23,000	4.8%
Food Services	202,900	198,200	2.4%
Total	273,200	269,100	1.5%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in October 2016 increased 3.4 percent, while room revenue increased 5.0 percent, equaling the nation. Nationally, room demand increased 1.5 percent while revenue increased 4.6 percent.

Gaming Revenue (in millions)

Through October, gaming facilities generated more than \$397 million dollars in revenue, an increase of 5.0 percent from last year's \$378.1 million.

Gaming Facility	FY 2017 YTD (In millions)	FY 2016 YTD (In millions)	Change
Hollywood, VLT	\$20.9	\$21.9	(4.9%)
Hollywood, Table	\$3.7	\$3.9	(5.6%)
Ocean Downs, VLT	\$23.6	\$22.8	3.2%
Maryland Live, VLT	\$135.7	\$138.3	(1.9%)
Maryland Live, Table	\$87.8	\$75.3	16.6%
Rocky Gap, VLT	\$16.1	\$14.6	10.1%
Rocky Gap, Table	\$2.7	\$2.2	22.7%
Horseshoe, VLT	\$56.6	\$53.6	5.5%
Horseshoe, Table	\$49.7	\$45.2	10.0%
Combined Total	\$396.7	\$378.0	5.0%

Source: Maryland Lottery

Tourism Sales Tax Revenues

The first four months of FY2017 have seen continued gains year over year in overall Tourism Tax Code Revenue. Tourism Tax categories increased 3.6 percent while all sales tax contributions only rose 1.9%. Tourism Tax Codes, the amount deemed attributable by the Comptroller, rose 3.8 percent.

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	\$135,725,655	\$131,853,774	2.9%	33%	\$45,241,885	\$43,951,258	2.9%
111 Hotels, Motels Selling Food - W/BWL	\$15,639,948	\$15,740,251	(0.6%)	100%	\$15,639,948	\$15,740,251	(0.6%)
112 Restaurants and Night Clubs - W/BWL	\$94,102,854	\$91,992,800	2.3%	33%	\$31,367,618	\$30,664,266	2.3%
306 General Merchandise	\$87,492,677	\$82,904,832	5.5%	5%	\$4,374,634	\$4,145,242	5.5%
407 Automobile, Bus and Truck Rentals	\$25,159,545	\$25,670,560	(2.0%)	90%	\$22,643,591	\$23,203,504	(2.0%)
706 Airlines - Commercial	\$129,263	\$338,859	(61.9%)	50%	\$64,632	\$169,430	(61.9%)
901 Hotels, Motels, Apartments, Cottages	\$47,290,823	\$42,684,244	10.8%	100%	\$47,290,823	\$42,684,244	10.8%
925 Recreation and Amusement Places	\$3,411,834	\$3,384,355	0.8%	50%	\$1,705,917	\$1,692,178	0.8%
Tourism Tax Categories Subtotal	\$408,952,600	\$394,569,675	3.6%	-	\$168,329,047	\$162,150,372	3.8%
All Sales Tax Categories Subtotal	\$1,552,652,646	\$1,523,735,432	1.9%				

