

VISIT MARYLAND MONTHLY TOURISM MONITOR (Data through January 2018)

Tourism generates economic benefits for Maryland through visitor spending.
Or put more simply: More Customers. More Revenue. More Jobs.

Economic Impact 2016:

42.1
Million
Visitors

\$17.3
Billion in
Visitor
Spending

146,000
FTE-
Jobs

\$2.35
Billion in
State & Local
Taxes

\$6
Billion in
Payroll

\$468.8
Million in
Sales & Use
Taxes
FY17

Goals:

1. Inspire travel to Maryland by strengthening awareness of the state as a leisure destination by increasing customer interactions; building awareness of the opportunities available; capitalizing on owned assets and through media outreaches.

| Customer Interactions* | Year over Year | | | Fiscal Year | | |
|------------------------------------------------------|----------------|----------|----------------|-------------|-----------|----------------|
| | Jan 2017 | Jan 2018 | Percent Change | YTD-17 | YTD-18 | Percent Change |
| Unique Web Visitors | 141,880 | 144,712 | 2.0% | 1,707,092 | 1,590,000 | (-6.9%) |
| Advertising Interactions | 3,314 | 2,836 | (-14.4%) | 22,089 | 19,392 | (-12.2%) |
| Public Relations/ Earned Media Effectiveness** | 12.6 | 9.4 | (-3.2) | 11.6 | 10.4 | (-1.3) |
| Social Media Followers | 1,797 | 1,509 | (-16.0%) | 109,323 | 131,517 | 20.3% |
| Welcome Center Visitors | 23,769 | 19,270 | (-18.9%) | 217,005 | 254,944 | 17.5% |
| Advertising Expenditures | 14,734 | 43,708 | 196.7% | 442,838 | 450,761 | 1.8% |

*Maryland Fleet Week and Air Show Baltimore was held in October 2016 and generated a great deal of consumer interest as shown in the numbers of web visitors, media effectiveness, and social media followers. Additionally, the dollars spent on advertising during the winter months of FY2018 diminished and will be allocated to the more active summer months.

**Evaluation of 3rd party placements, max score=18

2. Increase the number of jobs supported by the tourism industry in Maryland in the leisure and hospitality sector.

| BLS Leisure and Hospitality Employment (Thousands) | Year over Year | | | Fiscal Year | | |
|-------------------------------------------------------|----------------|----------|----------------|-------------|--------|----------------|
| | Jan 2017 | Jan 2018 | Percent Change | YTD-17 | YTD-18 | Percent Change |
| | 260.1 | 253 | (-2.7%) | 276.7 | 276.2 | (-0.2%) |

Subject to revision by the BLS

VISIT MARYLAND MONTHLY TOURISM MONITOR

(Data through January 2018)

- Increase sales tax revenues from categories deemed attributable to tourism by the MD Comptroller with emphasis on tax codes 111 and 901. These codes make up 30% of overall tourism-related collections and are directly attributable to overnight stays.

| ADJUSTED SALES AND USE TAXES ATTRIBUTABLE TO TOURISM (\$Millions) | | | | | | |
|-------------------------------------------------------------------|----------------|---------------|----------------|----------------|----------------|----------------|
| Sales Tax Code & Category | Year over Year | | | Fiscal Year | | |
| | Jan 2017 | Jan 2018 | Percent Change | YTD-17 | YTD-18 | Percent Change |
| 108 Restaurants, Lunchrooms, Delicatessens - WO/BWL | \$9.9 | \$9.8 | (-1.0%) | \$76.9 | \$78.5 | 2.0% |
| 111 Hotels, Motels Selling Food - W/BWL | \$2.0 | \$1.8 | (-5.3%) | \$22.3 | \$21.9 | (-1.5%) |
| 112 Restaurants and Nite Clubs - W/BWL | \$6.2 | \$6.4 | 2.9% | \$51.6 | \$53.3 | 3.2% |
| 306 General Merchandise | \$1.0 | \$1.1 | 15.0% | \$8.3 | \$9.3 | 12.4% |
| 407 Automobile, Bus and Truck Rentals | \$4.8 | \$4.9 | 2.7% | \$39.9 | \$39.0 | (-2.3%) |
| 706 Airlines - Commercial | \$0.008 | \$0.009 | 12.1% | \$0.10 | \$0.14 | 36.9% |
| 901 Hotels, Motels, Apartments, Cottages | \$7.0 | \$6.4 | (-8.3%) | \$69.7 | \$72.6 | 4.2% |
| 925 Recreation and Amusement Places | \$0.4 | \$0.3 | (-16.5%) | \$2.7 | \$2.6 | (-5.1%) |
| Tourism Tax Categories Subtotal | \$31.1 | \$30.7 | (-1.3%) | \$271.5 | \$277.3 | 2.1% |
| All other Sales Tax Collections | \$322.5 | \$334.1 | 3.6% | \$2,720.5 | \$2,757.4 | 1.4% |

Numbers may not sum due to rounding

- Provide resources to the tourism industry so that they can maximize access to consumers and grow revenue for their businesses.

| | Year over Year | | | Fiscal Year | | |
|---------------------------------------------------------|----------------|----------|----------------|-------------|---------|----------------|
| | Jan 2017 | Jan 2018 | Percent Change | YTD-17 | YTD-18 | Percent Change |
| Digital referrals to industry partners (outbound links) | 13,995 | 13,236 | (-5.4%) | 175,245 | 213,212 | 21.7% |