

Maryland Tourism Monitor

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

Consumer Interactions

Print:

Through the first five 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 more than 50 percent while print advertising leads now only lags by 6.5 percent.

Request Type	FY 2017 YTD	FY 2016 YTD	Change
Print advertising requests	9,825	10,507	(6.5%)
Print ad budget	\$0	\$48,403	(100%)
Broadcast leads	1,895	1,255	51.0%
Broadcast ad budget	\$337,992	\$444,147	(23.9%)

Web:

Web visitation through the first five months of FY17 continues to see significant strength in website visits – primarily driven by organic traffic to VisitMaryland.org. Total unique traffic is up nearly 104 percent year over year. OTD's requests for web travel kits are also up significantly from FY 16 with a 13 percent increase.

Interaction Type	FY 2017 YTD	FY 2016 YTD	Change
Website unique visitors*	1,623,113	795,702	103.9%
Web advertising clicks	163,688	527,678	(69.0%)
Web travel kit requests	4,740	4,193	13.0%
Online advertising budget	\$77,500	\$176,537	(56.1%)

* 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.industry.visitmaryland.org, www.fishandhuntmaryland.com.

Communications Efforts

Through the first five months of FY17, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$5.3 million in advertising value for Maryland tourism products and services.

Each month, OTD reports the M3 measurement. For November 2016, these were: Message (3.0), Tonality (3.0), Graphic (1.3), Outlet Tier (1.2), Geographic Market (1.3), & OTD initiative (1.3) – for a total of 11.1 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 29.6 percent this fiscal year compared to last. OTD Twitter followers have grown 15.1 percent.

Instagram continues to be an explosive source of new growth for OTD with nearly a 145 percent increase in followers year over year.

	FY 2017 YTD	FY 2016 YTD	Change
Facebook fans	35,546	27,424	29.6%
Twitter followers	38,161	33,419	15.1%
Instagram followers	31,888	13,025	144.8%

Partner Referrals & Outbound Clicks

Through the first five months of FY17, more than 143,000 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	10,838	76,903
Attractions	3,426	33,763
Accommodations	1,826	20,252
Dining	689	7,542
Arts & Culture	591	3,822
Golf	23	388
Shopping	100	536
Entertainment/Nightlife	14	129
Parks, Nature, Scenic	23	137

Welcome Centers

During November 2016, 45,171 visitors passed through Maryland's welcome centers and more than 198,000 have during this fiscal year – a 19.2 percent increase compared to FY16.

Kiosk systems at the I70 Welcome Centers are currently down and are being repaired.

Amtrak

The Amtrak train system in Maryland recorded 83,000 non-commuter arrivals during November. Through the first five months of FY2017, the Amtrak system continues to out-perform compared to year over year with a 5.1 percent increase in volume.

BWI Airport

Nearly 5.5 million passengers arrived at BWI airport through November 2017. When compared to the same time period the previous year, this represents nearly a 3.5 percent rise compared to the previous year.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 3.2 percent in November compared to last year. Maryland performed near the national statistic; employment in these three industries saw an overall increase of 1.7 percent.

	November 2017	November 2016	Change
Arts, Entertainment, Recreation	43,100	44,000	(2.0%)
Accommodation	23,000	21,800	5.5%
Food Services	201,700	193,700	4.1%
Total	267,800	259,500	3.2%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in November 2016 increased 3.4 percent, while room revenue increased 4.8 percent, consistent with the nation. Nationally, room demand increased 1.7 percent while revenue increased 4.9 percent.

Gaming Revenue (in millions)

Through November, gaming facilities generated more than \$488 million dollars in revenue, an increase from last year's \$467.7 million by 4.5 percent.

Gaming Facility	FY 2017 YTD (In millions)	FY 2016 YTD (In millions)	Change
Hollywood, VLT	\$25.6	\$27.0	(5.3%)
Hollywood, Table	\$4.7	\$5.0	(6.4%)
Ocean Downs, VLT	\$27.4	\$26.7	2.5%
Maryland Live, VLT	\$166.5	\$172.5	(3.4%)
Maryland Live, Table	\$107.3	\$92.8	15.6%
Rocky Gap, VLT	\$19.2	\$17.7	8.9%
Rocky Gap, Table	\$3.3	\$2.7	21.8%
Horseshoe, VLT	\$73.5	\$66.9	9.9%
Horseshoe, Table	\$61.3	\$56.1	8.4%
Combined Total	\$488.7	\$467.7	4.5%

Source: Maryland Lottery

Tourism Sales Tax Revenues

The first five months of FY2017 have seen continued gains year over year in overall Tourism Tax Code Revenue. Tourism Tax categories increased 3.0 percent while all sales tax contributions only rose 2.1%. Tourism Tax Codes, the amount deemed attributable by the Comptroller, rose 1.8 percent compared to 10.2 percent at this time in FY16.

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	\$167,121,822	\$164,159,327	1.8%	33%	\$55,707,274	\$54,719,775	1.8%
111 Hotels, Motels Selling Food - W/BWL	\$18,122,944	\$19,038,470	(4.8%)	100%	\$18,122,944	\$19,038,470	(4.8%)
112 Restaurants and Night Clubs - W/BWL	\$113,400,348	\$113,217,558	0.2%	33%	\$37,800,116	\$37,739,186	0.2%
306 General Merchandise	\$112,980,018	\$102,952,909	9.7%	5%	\$5,649,001	\$5,147,645	9.7%
407 Automobile, Bus and Truck Rentals	\$30,854,099	\$31,621,065	(2.4%)	90%	\$27,768,689	\$28,458,959	(2.4%)
706 Airlines - Commercial	\$148,503	\$485,623	(69.4%)	50%	\$74,252	\$242,812	(69.4%)
901 Hotels, Motels, Apartments, Cottages	\$54,764,390	\$51,082,612	7.2%	100%	\$54,764,390	\$51,082,612	7.2%
925 Recreation and Amusement Places	\$4,028,875	\$4,086,789	(1.4%)	50%	\$2,014,437	\$2,043,395	(1.4%)
Tourism Tax Categories Subtotal	\$501,421,000	\$486,644,353	3.0%	-	\$201,901,103	\$198,274,853	1.8%
All Sales Tax Categories Subtotal	\$1,931,266,890	\$1,892,157,334	2.1%				

