

Maryland Tourism Monitor

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

Consumer Interactions

Print:

Previous years Tourism Monitors reported the allotted budgets as opposed to our monthly spend; moving forward we will begin to report the actual spend rather than the complete budget. The first month of FY17, July, experienced downtrends in both our print advertising requests and broadcast leads – a direct result of lower advertising spends.

Request Type	FY 2017 YTD	FY 2016 YTD	Change
Print advertising requests	2,131	3,042	(29.9%)
Print ad budget	1,633	--	--
Broadcast leads	321	412	(22.1%)
Broadcast ad budget	12,602	--	--

Web:

Web visitation through the first month of Fiscal Year 2017 has seen significant improvement in our overall website visitors – primarily driven by traffic to VisitMaryland.Org. Total unique traffic is up 81.9 percent when compared to July 2017.

Interaction Type	FY 2017 YTD	FY 2016 YTD	Change
Website unique visitors*	307,317	168,934	81.9%
Web advertising clicks	0	--	--
Web travel kit requests	1,184	1404	(15.7%)
Online advertising budget	0	--	--

* 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 month of FY 17, communications activities such as press outreach, familiarization tours and visiting journalists generated over \$95,000 in advertising value for Maryland tourism products and services.

Each month we will also report the m3 measurement. For July 2016, these were: Message (2.4), Tonality (3.0), Graphic (2.9), Outlet Tier (1.3), Geographic Market (1.5), & OTD Initiative (1.5) – for a total of 12.6.*

* 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 26.9 percent this fiscal year compared to last. OTD Twitter followers have grown 17.7 percent.

Social media outlets continue to drive new traffic to the *VisitMaryland.org* site. The *TravelMD* Facebook page enticed 6,992 visitors to click to *VisitMaryland.org* and 937 Twitter followers were driven to the site in July.

	FY 2017 YTD	FY 2016 YTD	Change
Facebook fans	32,933	25,960	26.9%
Twitter followers	36,993	31,443	17.7%

Partner Referrals & Outbound Clicks

OTD reports on site engagement through a variety of measurements. One of these measurements is outbound traffic to its partner sites; events remain the number one outbound link category, followed by attractions and accommodations.

Category	Monthly Clicks	Clicks FYTD
Events	16,750	16,750
Attractions	11,391	11,391
Accommodations	7,154	7,154
Dining	2,258	2,258
Arts & Culture	911	911
Golf	117	117
Shopping	103	103
Entertainment/Nightlife	36	36
Parks, Nature, Scenic	37	37

Welcome Centers

43,326 visitors passed through Maryland's welcome centers during the first month of Fiscal Year 2017 compared to 34,399 during July 2016 – nearly a 26 percent increase year over year.

Kiosks at the I-70 Welcome Centers recorded 433 sessions during July, more than double the previous year's total of 177. This increase can be attributed to maintenance which was conducted during the previous year.

Amtrak

The Amtrak train system in Maryland recorded 78,300 non-commuter arrivals through July, an increase of approximately 5.2 percent year over year.

BWI Airport

Nearly 1.2 million flew through BWI in July, a record for the month – an increase of 2.1 percent. BWI looks to continue its record breaking year from FY16.

Leisure and Hospitality Employment

Employment in Maryland’s Leisure and Hospitality sector grew 3.8 percent in July compared to last year. At the national level, employment in these three industries also saw an overall increase of 2.4 percent.

	July 2016	July 2015	Change
Arts, Entertainment, Recreation	58,800	60,900	(3.4%)
Accommodation	27,500	26,400	4.2%
Food Services	221,700	209,500	5.8%
Total	308,000	296,800	3.8%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in July 2016 increased 0.1 percent, while room revenue increased 0.9 percent. Nationally, room demand increased 0.6 percent while revenue increased a comparable 4.2 percent.

Gaming Revenue (in millions)

In July, gaming facilities generated more than \$103 million dollars in revenue, an increase of 5 percent from last year’s \$99 million.

Gaming Facility	FY 2017 YTD (In millions)	FY 2016 YTD (In millions)	Change
Hollywood, VLT	\$5.7	\$5.9	(4.3%)
Hollywood, Table	\$1.1	\$1.0	13.0%
Ocean Downs, VLT	\$6.6	\$6.4	2.5%
Maryland Live, VLT	\$36.5	\$36.7	(0.5%)
Maryland Live, Table	\$24	\$20.2	18.4%
Rocky Gap, VLT	\$4.4	\$3.7	19.0%
Rocky Gap, Table	\$0.6	\$0.6	4.9%
Horseshoe, VLT	\$14.1	\$13.6	8.9%
Horseshoe, Table	\$10.1	\$10.8	(5.6%)
Combined Total	\$103.8	\$99.0	5.0%

Source: Maryland Lottery

Tourism Sales Tax Revenues

Sales Tax Category	TOTAL SALES TAX REVENUES (\$)			Factor	TOURISM TAX REVENUES (\$)		
	FY 2017 YTD	FY 2016 YTD	% Change		FY 2017 YTD	FY 2016 YTD	% Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL	\$34,108,730	\$33,535,804	1.7%	33%	\$11,369,577	\$11,178,601	1.7%
111 Hotels, Motels Selling Food - W/BWL	\$4,234,932	\$4,427,662	(4.4%)	100%	\$4,234,932	\$4,427,662	(4.4%)
112 Restaurants and Night Clubs - W/BWL	\$24,829,123	\$23,307,161	6.5%	33%	\$8,276,374	\$7,769,053	6.5%
306 General Merchandise	\$22,145,489	\$20,952,205	5.7%	5%	\$1,107,274	\$1,047,610	5.7%
407 Automobile, Bus and Truck Rentals	\$7,067,897	\$6,319,056	11.6%	90%	\$6,361,108	\$5,687,150	11.6%
706 Airlines - Commercial	\$64,003	\$34,326	86.6%	50%	\$32,002	\$17,163	86.6%
901 Hotels, Motels, Apartments, Cottages	\$13,738,760	\$12,280,054	11.9%	100%	\$13,738,760	\$12,280,054	11.9%
925 Recreation and Amusement Places	\$966,228	\$910,707	6.1%	50%	\$483,114	\$455,354	6.1%
Tourism Tax Categories Subtotal	\$107,155,163	\$101,766,975	5.3%	-	\$45,603,141	\$42,862,649	6.4%
All Sales Tax Categories Subtotal	\$385,950,973	\$379,822,559	1.6%				

