

Maryland Tourism Monitor

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

Consumer Interactions

Print:

Through the first six months of FY17, both print and broadcast leads are outperforming FY16. Broadcast leads are outperforming year over year by more than 16.7 percent while print advertising leads are outpacing FY16 by 1.9 percent.

Request Type	FY 2017 YTD	FY 2016 YTD	Change
Print advertising requests	11,501	11,292	1.9%
Print ad budget	\$905	\$48,403	(98.1%)
Broadcast leads	2,045	1,752	16.7%
Broadcast ad budget	\$348,911	\$454,549	(23.2%)

Web:

Traffic to VisitMaryland.org through the first six months of FY17 continues to see significant strength – primarily driven by organic traffic. Total unique traffic is up more than 100 percent year over year. OTD's requests for web travel kits are also up significantly from FY 16 with a 13.4 percent increase.

Interaction Type	FY 2017 YTD	FY 2016 YTD	Change
Website unique visitors*	1,832,989	905,041	102.5%
Web advertising clicks	188,833	555,958	(66.0%)
Web travel kit requests	5,229	4,613	13.4%
Online advertising budget	\$78,288	\$187,378	(58.2%)

* 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 six months of FY17, communications activities such as press outreach, familiarization tours and visiting journalists generated more than \$5.75 million in advertising value for Maryland tourism products and services.

Each month, OTD reports the M3 measurement. For November 2016, these were: Message (2.0), Tonality (3.0), Graphic (1.5), Outlet Tier (1.1), Geographic Market (1.0), & OTD initiative (1.0) – for a total of 9.7 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 13.5 percent.

Instagram continues to be an explosive source of new growth for OTD with more than a 120 percent increase in followers year over year.

	FY 2017 YTD	FY 2016 YTD	Change
Facebook fans	35,903	27,815	29.1%
Twitter followers	38,387	33,823	13.5%
Instagram followers	32,848	14,877	120.8%

Partner Referrals & Outbound Clicks

Through the first six months of FY17, more than 160,000 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 FY17 YTD
Events	11,173	88,076
Attractions	2,796	36,559
Accommodations	1,756	22,008
Dining	712	8,254
Arts & Culture	678	4,500
Golf	25	413
Shopping	85	621
Entertainment/Nightlife	25	154
Parks, Nature, Scenic	14	151

Welcome Centers

During December 2016, 57,701 visitors passed through Maryland's welcome centers and more than 256,000 have during this fiscal year – a 27.5 percent increase compared to FY16.

Kiosk systems at the 170 Welcome Centers are currently down and are being repaired.

Amtrak

The Amtrak train system in Maryland recorded more than 83,000 non-commuter arrivals during December. Through the first five months of FY2017, the Amtrak system continues to out-perform compared to year over year with a 5.5 percent increase in volume.

BWI Airport

More than 6.5 million passengers arrived at BWI airport through December 2016. When compared to the same time period the previous year, this represents a 3.6 percent rise compared to the previous year.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 3.6 percent in December compared to last year. Maryland performed above the national statistic where employment in these three industries saw an overall increase of 2.7 percent.

	December 2017	December 2016	Change
Arts, Entertainment, Recreation	41,700	43,100	(3.2%)
Accommodation	24,700	21,200	16.5%
Food Services	201,800	194,600	3.7%
Total	268,200	258,900	3.6%

Lodging

According to the latest data from Smith Travel Research, Inc., the number of rooms sold in Maryland in December 2016 increased 1.3 percent, while room revenue increased 5.2 percent, consistent with the nation. Nationally, room demand increased 1.7 percent while revenue increased 4.8 percent.

Gaming Revenue (in millions)

Through December, gaming facilities generated more than \$622.2 million dollars in revenue, an increase from last year's \$562.9 million; this is mostly driven by the opening of MGM National Harbor.

Gaming Facility	FY 2017 YTD (In millions)	FY 2016 YTD (In millions)	Change
Hollywood, VLT	\$30.6	\$32.4	(5.3%)
Hollywood, Table	\$5.7	\$5.9	(4.0%)
Ocean Downs, VLT	\$31.5	\$30.6	2.9%
Maryland Live, VLT	\$197.5	\$207.0	(4.6%)
Maryland Live, Table	\$124.3	\$112.5	10.5%
Rocky Gap, VLT	\$22.2	\$20.7	7.2%
Rocky Gap, Table	\$3.9	\$3.2	22.6%
Horseshoe, VLT	\$89.6	\$80.9	10.7%
Horseshoe, Table	\$74.9	\$69.7	7.5%
MGM Harbor VLT	\$24.4	--	--
MGM Harbor Table	\$17.6	--	--
Combined Total	\$622.2	\$562.9	10.5%

Source: Maryland Lottery

Tourism Sales Tax Revenues

The first six months of FY2017 have seen continued gains year over year in overall Tourism Tax Code Revenue. Tourism Tax categories increased 3.8 percent while all sales tax contributions only rose 2.3%. Tourism Tax Codes, the amount deemed attributable by the Comptroller, rose 4.6 percent.

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	\$201,131,396	\$195,019,701	3.1%	33%	\$67,043,799	\$65,006,567	3.1%
111 Hotels, Motels Selling Food - W/BWL	\$20,316,205	\$20,948,232	-3.0%	100%	\$20,316,205	\$20,948,232	-3.0%
112 Restaurants and Night Clubs - W/BWL	\$136,288,015	\$132,944,960	2.5%	33%	\$45,429,338	\$44,314,987	2.5%
306 General Merchandise	\$146,446,963	\$140,667,039	4.1%	5%	\$7,322,348	\$7,033,352	4.1%
407 Automobile, Bus and Truck Rentals	\$39,035,489	\$36,147,588	8.0%	90%	\$35,131,940	\$32,532,829	8.0%
706 Airlines - Commercial	\$192,955	\$432,812	-55.4%	50%	\$96,478	\$216,406	-55.4%
901 Hotels, Motels, Apartments, Cottages	\$62,658,420	\$57,444,291	9.1%	100%	\$62,658,420	\$57,444,291	9.1%
925 Recreation and Amusement Places	\$4,748,610	\$4,771,295	-0.5%	50%	\$2,374,305	\$2,385,648	-0.5%
Tourism Tax Categories Subtotal	\$610,818,053	\$588,375,918	3.8%	-	\$240,372,833	\$229,882,311	4.6%
All Sales Tax Categories Subtotal	\$2,397,925,903	\$2,342,984,191	2.3%				

