

# Maryland Tourism Monitor

Recap of Maryland's travel & tourism trends, monitored by the Office of Tourism Development (Data through February 2017)

## Consumer Interactions

### Print:

Through February 2017, both print and broadcast leads are outperforming year over year. Broadcast leads have increased significantly, up nearly 25 percent, while print advertising requests are outpacing FY16 by 2.5 percent.

Request Type	FY 2017 YTD	FY 2016 YTD	Change
Print advertising requests	14,622	14,271	2.5%
Print ad budget	\$21,925	\$52,345	(58.1%)
Broadcast leads	2,221	1,780	24.8%
Broadcast ad budget	\$372,054	\$476,564	(21.9%)

### Web:

Traffic to all OTD websites through the first eight months of FY17 continue to show strength – primarily driven by increases to Visitmaryland.org. OTD's requests for web travel kits are also up significantly from FY 16 with a 27.4 percent increase.

Interaction Type	FY 2017 YTD	FY 2016 YTD	Change
Website unique visitors*	1,758,610	1,121,211	56.8%
Web advertising clicks	290,159	610,597	(52.5%)
Web travel kit requests	8,213	6,447	27.4%
Online advertising budget	\$87,968	\$210,186	(58.1%)

\* The performance measure includes the following web sites: [www.visitmaryland.org](http://www.visitmaryland.org), [www.SS200.com](http://www.SS200.com), [www.SS200.org](http://www.SS200.org), [www.keycam.com](http://www.keycam.com), [www.1821battles.com](http://www.1821battles.com), [www.1821battles.mobi](http://www.1821battles.mobi), [www.industry.visitmaryland.org](http://www.industry.visitmaryland.org), [www.fishandhuntmaryland.com](http://www.fishandhuntmaryland.com).

## Communications Efforts

Through February of FY17, communications activities such as press outreach, familiarization tours and visiting journalists generated nearly \$6 million in advertising value for Maryland tourism products and services.

OTD has adopted industry principles of effective PR and communications measurements. The February scores for the relevant criteria were: Message (2.4), Tonality (2.8), Graphic (2.1), Outlet Tier (1.5), Geographic Market (1.8), & OTD initiative (1.9) – for a total of 12.4 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 28.4 percent this fiscal year compared to last. OTD Twitter followers have grown 12.2 percent.

Instagram continues to be an explosive source of new growth for OTD with a 41.3 percent increase in followers compared to this time last year.

	FY 2017 YTD	FY 2016 YTD	Change
Facebook fans	37,148	28,941	28.4%
Twitter followers	39,292	35,018	12.2%
Instagram followers	25,381	17,964	41.3%

## Partner Referrals & Outbound Clicks

Through the first eight months of FY17, more than 190,560 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	FY 2017 YTD Clicks
Events	5,720	98,904
Attractions	4,734	45,172
Accommodations	3,032	28,046
Dining	729	10,085
Arts & Culture	766	6,015
Shopping	100	800
Golf	61	497
Outdoor Recreation	60	638
Entertainment/Nightlife	27	222
Parks, Nature, Scenic	18	186

## Welcome Centers

Maryland's welcome centers received more than 17,000 visitors in February of 2017. This Fiscal year to date, they have received more than 234,000 – a 16 percent increase compared to FY16. The opening of previously closed welcome centers has driven this increase.

Kiosk systems at the I70 Welcome are currently under repair.

## Amtrak

The Amtrak train system in Maryland recorded 65,600 non-commuter arrivals during February. Through the first eight months of FY2017, the Amtrak system continues to out-perform with a year over year increase in passenger volume of 6.1 percent.

## BWI Airport

More than 8.3 million passengers arrived at BWI airport through February 2017. When compared to the same time period the previous year, this represents a 4.3 percent rise compared to the previous year.

## Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 1.0 percent in February compared to last year. The growth in employment in these sectors for the entire country was only 1.8 percent.

	February 2017	February 2016	Change
Arts, Entertainment, Recreation	38,500	38,000	1.3%
Accommodation	24,000	22,000	8.3%
Food Services	191,700	191,700	0.0%
<b>Total</b>	<b>254,200</b>	<b>251,700</b>	<b>1.0%</b>

## Lodging

According to the latest data from STR, Inc., the number of rooms sold in Maryland in February 2017 increased 1.3 percent, while room revenue increased 5.0 percent. Nationally, room demand increased 1.4 percent while revenue increased 3.1 percent.

## Gaming Revenue (in millions)

This fiscal year through February, gaming facilities generated more than \$877 million dollars in revenue, an increase of nearly 18 percent from last year's \$744.6 million.

Gaming Facility	FY 2017 YTD	FY 2016 YTD	Change
Hollywood, VLT	\$40.7	\$42.6	(4.5%)
Hollywood, Table	\$7.5	\$7.6	(1.3%)
Ocean Downs, VLT	\$39.2	\$38.2	2.6%
Maryland Live, VLT	\$254.7	\$271.9	(6.3%)
Maryland Live, Table	\$157.4	\$153.7	2.4%
Rocky Gap, VLT	\$29.2	\$26.7	9.4%
Rocky Gap, Table	\$5.0	\$4.4	13.6%
Horseshoe, VLT	\$114.9	\$107.6	6.8%
Horseshoe, Table	\$91.8	\$91.7	0.1%
MGM Harbor VLT	\$72.3	-	-
MGM Harbor Table	\$64.2	-	-
<b>Combined Total</b>	<b>\$877.1</b>	<b>\$744.6</b>	<b>17.8%</b>

Source: Maryland Lottery – All figures in millions.

## Tourism Sales Tax Revenues

The first eight months of FY2017 have seen continued gains year over year in overall Tourism Tax Code Revenue. Tourism Tax categories increased 4.1 percent while sales tax contributions from all other categories only rose 2.2 percent. Tourism Tax Codes, the amount deemed attributable by the Comptroller, rose 5.1 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	\$261,083,554	\$252,217,607	3.5%	33%	\$87,027,851	\$84,072,536	3.5%
111 Hotels, Motels Selling Food - W/BWL	\$24,348,350	\$25,216,183	(3.4%)	100%	\$24,348,350	\$25,216,183	-3.4%
112 Restaurants and Night Clubs - W/BWL	\$175,059,087	\$169,824,317	3.1%	33%	\$58,353,029	\$56,608,106	3.1%
306 General Merchandise	\$184,731,430	\$178,053,379	3.8%	5%	\$9,236,572	\$8,902,669	3.8%
407 Automobile, Bus and Truck Rentals	\$49,167,549	\$45,877,590	7.2%	90%	\$44,250,794	\$41,289,831	7.2%
706 Airlines - Commercial	\$224,461	\$489,039	(54.1%)	50%	\$112,230	\$244,520	-54.1%
901 Hotels, Motels, Apartments, Cottages	\$76,930,615	\$69,270,579	11.1%	100%	\$76,930,615	\$69,270,579	11.1%
925 Recreation and Amusement Places	\$6,139,614	\$6,103,885	0.6%	50%	\$3,069,807	\$3,051,942	0.6%
<b>Tourism Tax Categories Subtotal</b>	<b>\$777,684,659</b>	<b>\$747,052,580</b>	<b>4.1%</b>	<b>-</b>	<b>\$303,329,247</b>	<b>\$288,656,366</b>	<b>5.1%</b>
All Sales Tax Categories Subtotal	\$3,052,546,865	\$2,986,576,084	2.2%				