

Maryland Tourism Monitor

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

Consumer Interactions

Print:

Through January 2017, both print and broadcast leads are outperforming year over year. Broadcast leads have increased significantly, up 27.6 percent, while print advertising requests are outpacing FY16 by 0.9 percent.

Request Type	FY 2017 YTD	FY 2016 YTD	Change
Print advertising requests	12,956	12,845	0.9%
Print ad budget	\$905	\$52,345	(98.3%)
Broadcast leads	2,014	1,578	27.6%
Broadcast ad budget	\$359,317	\$466,319	(22.9%)

Web:

Traffic to all OTD websites through the first seven months of FY17 continue to show strength – primarily driven by increases to VisitMaryland.org. Total unique traffic is up nearly 100 percent year over year. OTD's requests for web travel kits are also up significantly from FY 16 with a 30.9 percent increase.

Interaction Type	FY 2017 YTD	FY 2016 YTD	Change
Website unique visitors*	1,974,887	1,005,311	96.4%
Web advertising clicks	188,833	584,195	(67.7%)
Web travel kit requests	6,851	5,232	30.9%
Online advertising budget	\$82,616	\$199,252	(58.5%)

* 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 January of FY17, communications activities such as press outreach, familiarization tours and visiting journalists generated nearly \$8.4 million in advertising value for Maryland tourism products and services.

OTD has adopted industry principles of effective PR and communications measurements. The January scores for the relevant criteria were: Message (2.6), Tonality (3.0), Graphic (1.6), Outlet Tier (1.2), Geographic Market (1.4), & OTD initiative (2.5) – for a total of 12.6 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 nearly 29.0 percent this fiscal year compared to last. OTD Twitter followers have grown 12.8 percent.

Instagram continues to be an explosive source of new growth for OTD with a 117.2 percent increase in followers compared to this time last year.

	FY 2017 YTD	FY 2016 YTD	Change
Facebook fans	36,535	28,327	28.9%
Twitter followers	38,870	34,456	12.8%
Instagram followers	33,918	15,615	117.2%

Partner Referrals & Outbound Clicks

Through the first six months of FY17, more than 174,000 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	FY 2017 YTD Clicks
Events	5,108	93,184
Attractions	3,879	40,438
Accommodations	3,006	25,014
Dining	1,039	9,293
Arts & Culture	749	5,249
Golf	23	436
Shopping	69	690
Entertainment/Nightlife	41	195
Parks, Nature, Scenic	17	168

Welcome Centers

Maryland's welcome centers received 23,769 visitors in January of 2017. This Fiscal year to date, they have received more than 217,000 – an 18 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 more than 71,000 non-commuter arrivals during January. Through the first seven months of FY2017, the Amtrak system continues to out-perform with a year over year increase in passenger volume of 6.7 percent.

BWI Airport

More than 7.4 million passengers arrived at BWI airport through January 2017. When compared to the same time period the previous year, this represents a 4.5 percent rise compared to the previous year.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew 2.0 percent in January compared to last year. The growth in employment in these sectors for the entire country was only 1.8 percent.

	January 2017	January 2016	Change
Arts, Entertainment, Recreation	38,400	38,600	(0.5%)
Accommodation	23,900	21,800	9.6%
Food Services	193,800	190,600	1.7%
Total	254,900	252,900	2.0%

Lodging

According to the latest data from STR, Inc., the number of rooms sold in Maryland in January 2017 increased 7.2 percent, while room revenue increased 13.9 percent. Nationally, room demand increased 2.4 percent while revenue increased 5.7 percent.

Gaming Revenue (in millions)

This fiscal year through January, gaming facilities generated more than \$748.4 million dollars in revenue, an increase from last year's \$651.2 million.

Gaming Facility	FY 2017 YTD	FY 2016 YTD	Change
Hollywood, VLT	\$35.5	\$37.1	(4.3%)
Hollywood, Table	\$6.6	\$6.7	(1.4%)
Ocean Downs, VLT	\$35.1	\$34.3	(5.3%)
Maryland Live, VLT	\$225.5	\$238.2	5.2%
Maryland Live, Table	\$140.3	\$133.4	8.1%
Rocky Gap, VLT	\$25.4	\$23.5	18.5%
Rocky Gap, Table	\$4.4	\$3.8	2.5%
Horseshoe, VLT	\$101.9	\$93.3	9.2%
Horseshoe, Table	\$82.3	\$81.0	2.3%
MGM Harbor VLT	\$48.6	-	-
MGM Harbor Table	\$42.1	-	-
Combined Total	\$748.4	\$651.2	14.9%

Source: Maryland Lottery – All figures in millions.

Tourism Sales Tax Revenues

The first seven months of FY2017 have seen continued gains year over year in overall Tourism Tax Code Revenue. Tourism Tax categories increased 4.5 percent while sales tax contributions from all other categories only rose 2.6 percent. Tourism Tax Codes, the amount deemed attributable by the Comptroller, rose 5.2 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	\$230,722,540	\$222,492,410	3.7%	33%	\$76,907,513	\$74,164,137	3.7%
111 Hotels, Motels Selling Food - W/BWL	\$22,268,573	\$22,967,180	(3.0%)	100%	\$22,268,573	\$22,967,180	(3.0%)
112 Restaurants and Night Clubs - W/BWL	\$154,850,921	\$150,332,653	3.0%	33%	\$51,616,974	\$50,110,884	3.0%
306 General Merchandise	\$165,831,052	\$158,128,151	4.9%	5%	\$8,291,553	\$7,906,408	4.9%
407 Automobile, Bus and Truck Rentals	\$44,348,939	\$40,838,338	8.6%	90%	\$39,914,046	\$36,754,504	8.6%
706 Airlines - Commercial	\$209,049	\$476,867	(56.2%)	50%	\$104,524	\$238,433	(56.2%)
901 Hotels, Motels, Apartments, Cottages	\$69,672,501	\$63,165,673	10.3%	100%	\$69,672,501	\$63,165,673	10.3%
925 Recreation and Amusement Places	\$5,487,567	\$5,389,179	1.8%	50%	\$2,743,783	\$2,694,590	1.8%
Tourism Tax Categories Subtotal	\$693,391,142	\$663,790,452	4.5%	-	\$271,519,467	\$258,001,809	5.2%
All Sales Tax Categories Subtotal	\$2,650,407,558	\$70,058,094	2.6%				