

# Maryland Tourism Monitor

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

## Consumer Interactions

During Fiscal Year 2017 broadcast leads and print advertising requests collectively grew nearly 22 percent. Although the print advertising budget decreased by more than 8 percent, the broadcast advertising budget grew by more than 4 percent.

Request Type	FY 2017 YTD	FY 2016 YTD	Change
Print ad requests	28,289	27,113	4.3%
Print ad budget	\$184,312	\$200,968	(-8.3%)
Broadcast leads	3,769	3,212	17.3%
Broadcast ad budget	\$1,644,335	\$1,574,539	4.4%

### Web:

Traffic to all OTD websites for FY 2017 showed strength, primarily driven by visitmaryland.org, with total unique traffic growing nearly 41 percent. Web advertising clicks saw a significant decline of nearly 61 percent which reflect declines in online advertising dollars by 52 percent.

Interaction Type	FY 2017 YTD	FY 2016 YTD	Change
Website unique visitors*	3,003,460	2,137,383	40.5%
Web advertising clicks	518,915	1,323,245	(-60.8%)
Web travel kit requests	14,129	12,033	17.4%
Online ad budget	297,141	624,405	(-52.4%)

\* 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.1812battles.mobi](http://www.1812battles.mobi), [www.industry.visitmaryland.org](http://www.industry.visitmaryland.org), [www.fishandhuntmaryland.com](http://www.fishandhuntmaryland.com).

## Communications Efforts

During FY 2017, communications activities such as press outreach, familiarization tours and visiting journalists, including international, generated nearly \$15.6 million in advertising value for Maryland tourism products and services.

OTD has adopted industry principles of effective PR and communications measurements. The June scores for the relevant criteria were: Message (2.1), Tonality (3.0), Graphic (2.1), Outlet Tier (1.5), Geographic Market (1.6), & OTD initiative (1.4) – for a total of 11.6 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 24 percent this fiscal year compared to last. OTD Twitter followers have grown nearly 13 percent.

Instagram continues to be an explosive source of new growth for OTD with a 59 percent increase in followers compared to this time last year.

	FY 2017 YTD	FY 2016 YTD	Change
Facebook fans	40,050	32,355	23.8%
Twitter followers	41,142	36,536	12.6%
Instagram followers	39,038	24,562	58.9%

## Partner Referrals & Outbound Clicks

During FY 2017, more than 309,750 outbound links were navigated by visitors from VisitMaryland.org to our local partners. Events remain the number one outbound link category, followed by attractions and accommodations.

Category	Monthly Clicks	FY 2017 YTD Clicks
Events	19,171	155,918
Attractions	11,106	75,784
Accommodations	7,324	48,434
Dining	1,984	15,846
Arts & Culture	1,108	9,618
Shopping	280	1,353
Outdoor Recreation	128	1,073
Golf	95	831
Entertainment/Nightlife	25	320
Parks, Nature, Scenic	17	271
<b>Total</b>	<b>41,238</b>	<b>309,752</b>

## Welcome Centers

OTD-operated welcome centers received more than 40,700 visitors in June of 2017. During FY 2017, these eight facilities have received nearly 371,880 – a 6 percent increase compared to FY 2016. The opening of previously closed welcome centers has driven this increase.

## Lodging

According to STR, Inc., during the first six months of the 2017 calendar year, the number of rooms sold in Maryland increased 1.3 percent, while room revenue increased 3.3 percent. Compared to June of 2016, the occupancy rate remained unchanged and the average daily rate increased slightly from \$132.62 to \$131.12.

Room demand in the Capital, Southern, and Eastern Shore regions outpaced the state-wide growth and both the Capital and Southern regions also outperformed the state's growth in the following: Average Daily Rates, Room Revenue and Revenue per Available Room.

## Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector increased 1.8 percent in June of 2017 compared to 2016. The June 2017 employment in this sector is approximately 10.6 percent of the total non-farm employment in Maryland.

	June 17	June 16	Change
Arts, Entertainment, Recreation	57,000	53,700	6.1%
Accommodation	29,100	25,800	12.8%
Food Services	210,100	211,400	(-0.6%)
<b>Total</b>	<b>296,200</b>	<b>290,900</b>	<b>1.8%</b>

## Amtrak

The Amtrak train system in Maryland recorded 86,700 non-commuter arrivals during June. During FY 2017, the Amtrak system grew 5 percent compared to FY 2016.

## Gaming Revenue (In Millions)

During FY 2017, gaming facilities generated more than 1.4 billion dollars in revenue, an increase of more than 24 percent from last year's \$ 1.1 billion.

Gaming Facility	FY 2017 YTD	FY 2016 YTD	Change
Hollywood, VLT	\$63.1	\$65.7	(-4.0%)
Hollywood, Table	\$11.3	\$11.6	(-2.6%)
Ocean Downs, VLT	\$59.6	\$57.7	3.3%
Maryland Live, VLT	\$371.9	\$408.8	(-9.0%)
Maryland Live, Table	\$219.8	\$242.1	(-9.2%)
Rocky Gap, VLT	\$45.1	\$41.3	9.2%
Rocky Gap, Table	\$7.6	\$6.6	15.2%
Horseshoe, VLT	\$168.7	\$168.3	0.2%
Horseshoe, Table	\$135.3	\$142.1	(-4.8%)
MGM Harbor VLT	\$177.5	-	-
MGM Harbor Table	\$160.1	-	-
<b>Combined Total</b>	<b>\$1,420</b>	<b>\$1,143</b>	<b>24.2%</b>

Source: Maryland Lottery – numbers may not sum due to rounding.

## Tourism Sales Tax Revenues

Fiscal Year 2017 saw continued gains year over year in overall Tourism Tax Code Revenue. Tourism Tax categories increased 3.7 percent while sales tax contributions from all other categories only rose 2 percent. Tourism Tax Codes, the amount deemed attributable by the Comptroller, rose 4.1 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	\$400,320,528	\$388,518,457	3.0%	33%	\$133,440,176	\$129,506,152	3.0%
111 Hotels, Motels Selling Food - W/BWL	\$38,300,208	\$40,015,318	(-4.3%)	100%	\$38,300,208	\$40,015,318	(-4.3%)
112 Restaurants and Night Clubs - W/BWL	\$273,473,940	\$265,536,190	3.0%	33%	\$91,157,980	\$88,512,063	3.0%
306 General Merchandise	\$280,418,657	\$268,734,816	4.3%	5%	\$14,020,933	\$13,436,741	4.3%
407 Automobile, Bus and Truck Rentals	\$73,394,550	\$70,843,970	3.6%	90%	\$66,055,095	\$63,759,573	3.6%
706 Airlines - Commercial	\$425,079	\$616,251	(-31.0%)	50%	\$212,539	\$308,126	(-31.0%)
901 Hotels, Motels, Apartments, Cottages	\$121,066,314	\$110,380,878	9.7%	100%	\$121,066,314	\$110,380,878	9.7%
925 Recreation and Amusement Places	\$9,251,171	\$9,275,532	(-0.3%)	50%	\$4,625,586	\$4,637,766	(-0.3%)
<b>Tourism Tax Categories Subtotal</b>	<b>\$1,196,650,448</b>	<b>\$1,153,921,412</b>	<b>3.7%</b>	-	<b>\$468,878,831</b>	<b>\$450,556,617</b>	<b>4.1%</b>
<i>All Sales Tax Categories Subtotal</i>	<i>\$4,627,727,406</i>	<i>\$4,536,834,478</i>	<i>2.0%</i>				