

Maryland Tourism Monitor

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

Consumer Interactions

Through May 2017, broadcast leads are outperforming year over year despite reductions in both print and broadcast advertising budgets. Broadcast leads and print advertising requests have collectively increased nearly 26 percent.

Request Type	FY 2017 YTD	FY 2016 YTD	Change
Print ad requests	27,462	27,541	(-0.3%)
Print ad budget	\$149,587	\$180,191	(-17.0%)
Broadcast leads	3,002	2,378	26.2%
Broadcast ad budget	\$348,911	\$1,092,017	(-68.0%)

Web:

Traffic to all OTD websites through the first eleven months of FY 2017 continues to show strength – primarily driven by increases to Visitmaryland.org. Total unique traffic is up nearly 47 percent year over year. OTD's requests for web travel kits are also up significantly from FY 2016 with a 19 percent increase.

Interaction Type	FY 2017 YTD	FY 2016 YTD	Change
Website unique visitors*	2,329,382	1,577,721	46.9%
Web advertising clicks	499,787	656,024	(-23.8%)
Web travel kit requests	12,575	10,542	19.3%
Online ad budget	112,667	481,074	(-76.6%)

* The performance measure includes the following web sites: www.visitmaryland.org, 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 May of FY 2017, communications activities such as press outreach, familiarization tours and visiting journalists, including international, generated nearly \$14.5 million in advertising value for Maryland tourism products and services.

OTD has adopted industry principles of effective PR and communications measurements. The May scores for the relevant criteria were: Message (2.2), Tonality (3.0), Graphic (1.7), Outlet Tier (1.2), Geographic Market (1.5), & OTD initiative (1.4) – for a total of 11.1 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 26 percent this fiscal year compared to last. OTD Twitter followers have grown 12.4 percent.

Instagram continues to be an explosive source of new growth for OTD with a nearly 64 percent increase in followers compared to this time last year.

	FY 2017 YTD	FY 2016 YTD	Change
Facebook fans	39,488	31,395	25.8%
Twitter followers	40,681	36,187	12.4%
Instagram followers	38,444	23,471	63.8%

Partner Referrals & Outbound Clicks

Through the first eleven months of FY 2017, more than 268,500 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	16,933	136,747
Attractions	7,401	64,678
Accommodations	4,884	41,110
Dining	1,424	13,862
Arts & Culture	908	8,510
Shopping	127	1,248
Outdoor Recreation	179	1,073
Golf	98	736
Entertainment/Nightlife	22	303
Parks, Nature, Scenic	21	246
Total	31,997	268,513

Welcome Centers

OTD-operated welcome centers received more than 36,424 visitors in May of 2017. This Fiscal year to date, these eight facilities have received more than 331,168– a 10.5 percent increase compared to FY2016. The opening of previously closed welcome centers has driven this increase.

Lodging

According to the latest data from STR, Inc., during the first five months of the 2017 calendar year, the number of rooms sold in Maryland increased 1.3 percent, while room revenue increased 3.6 percent. Compared to May of 2016, the occupancy rate remained steady at 72.6 percent and the average daily rate increased from \$124.8 to \$127.2.

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

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector decreased one tenths of a percent in May of 2017 compared to 2016. The May 2017 employment in this sector is approximately 10.1 percent of the total employment in Maryland.

	May 17	May 16	Change
Arts, Entertainment, Recreation	48,600	47,300	0.0%
Accommodation	27,500	24,900	10.4%
Food Services	204,000	208,200	(-2.0%)
Total	280,100	280,400	(-0.1%)

Amtrak

The Amtrak train system in Maryland recorded 89,200 non-commuter arrivals during May. Through the first eleven months of FY 2017, the Amtrak system grew 5.1 percent compared to the same period last year.

Gaming Revenue (In Millions)

This fiscal year through May, gaming facilities generated more than 1.2 billion dollars in revenue, an increase of nearly 23 percent from last year's \$1 billion.

Gaming Facility	FY 2017 YTD	FY 2016 YTD	Change
Hollywood, VLT	\$56.7	\$60.5	(-6.3%)
Hollywood, Table	\$10.4	\$10.7	(-2.8%)
Ocean Downs, VLT	\$54.0	\$52.5	2.9%
Maryland Live, VLT	\$344.3	\$376.9	(-8.6%)
Maryland Live, Table	\$205.6	\$376.9	(-6.6%)
Rocky Gap, VLT	\$41.2	\$37.6	9.6%
Rocky Gap, Table	\$7.0	\$6.2	12.9%
Horseshoe, VLT	\$155.9	\$154.7	0.8%
Horseshoe, Table	\$126.0	\$131.2	(-4.0%)
MGM Harbor VLT	\$151.9	-	-
MGM Harbor Table	\$136.3	-	-
Combined Total	\$1,290.4	\$1,050.6	22.8%

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

Tourism Sales Tax Revenues

The first eleven months of FY 2017 have seen 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 2.1 percent. Tourism Tax Codes, the amount deemed attributable by the Comptroller, rose 4.1 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	\$363,706,645	\$353,461,051	2.9%	33%	\$121,235,548	\$117,820,350	2.9%
111 Hotels, Motels Selling Food - W/BWL	\$34,140,366	\$35,882,398	(-4.9%)	100%	\$34,140,366	\$35,882,398	(-4.9%)
112 Restaurants and Night Clubs - W/BWL	\$247,059,163	\$240,314,571	2.8%	33%	\$82,353,054	\$80,104,857	2.8%
306 General Merchandise	\$253,911,748	\$243,164,423	4.4%	5%	\$12,695,587	\$12,158,221	4.4%
407 Automobile, Bus and Truck Rentals	\$66,562,464	\$63,773,018	4.4%	90%	\$59,906,218	\$57,395,716	4.4%
706 Airlines - Commercial	\$297,351	\$579,343	(-48.7%)	50%	\$148,675	\$289,672	(-48.7%)
901 Hotels, Motels, Apartments, Cottages	\$107,568,430	\$97,761,786	10.0%	100%	\$107,568,430	\$97,761,786	10.0%
925 Recreation and Amusement Places	\$8,260,911	\$8,393,782	(-1.6%)	50%	\$4,130,456	\$4,196,891	(-1.6%)
Tourism Tax Categories Subtotal	\$1,081,507,079	\$1,043,330,372	3.7%	-	\$422,178,335	\$405,609,890	4.1%
<i>All Sales Tax Categories Subtotal</i>	<i>\$4,204,068,196</i>	<i>\$4,115,868,190</i>	<i>2.1%</i>				