

Maryland Tourism Monitor

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

Consumer Interactions

Print:

Through March 2017, both print and broadcast leads are outperforming year over year. Broadcast leads and print advertising requests have collectively increased nearly 27 percent compared to the same time last fiscal year.

Request Type	FY 2017 YTD	FY 2016 YTD	Change
Print advertising requests	16,838	16,537	1.8%
Print ad budget	\$52,975	\$102,322	(48.2%)
Broadcast leads	2,460	1,972	24.7%
Broadcast ad budget	\$382,289	\$478,013	(20.0%)

Web:

Traffic to all OTD websites through the first nine months of FY17 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 16 with a 27 percent increase.

Interaction Type	FY 2017 YTD	FY 2016 YTD	Change
Website unique visitors*	1,913,061	1,302,702	46.9%
Web advertising clicks	319,880	656,024	(51.2%)
Web travel kit requests	9,659	7,594	27.2%
Online advertising budget	\$89,368	\$229,638	(60.1%)

* 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 March of FY17, communications activities such as press outreach, familiarization tours and visiting journalists generated nearly \$8 million in advertising value for Maryland tourism products and services.

OTD has adopted industry principles of effective PR and communications measurements. The March scores for the relevant criteria were: Message (2.9), Tonality (3.0), Graphic (2.8), Outlet Tier (1.7), Geographic Market (2.1), & OTD initiative (2.8) – for a total of 15.3 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 27.4 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 an 81.7 percent increase in followers compared to this time last year.

	FY 2017 YTD	FY 2016 YTD	Change
Facebook fans	37,899	29,751	27.4%
Twitter followers	39,720	35,414	12.2%
Instagram followers	36,277	19,962	81.7%

Partner Referrals & Outbound Clicks

Through the first nine months of FY17, nearly 210,620 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	8,796	107,700
Attractions	5,347	50,519
Accommodations	3,790	31,836
Dining	1,051	11,136
Arts & Culture	762	6,777
Shopping	122	922
Outdoor Recreation	85	723
Golf	49	546
Entertainment/Nightlife	29	251
Parks, Nature, Scenic	22	208

Welcome Centers

Maryland's welcome centers received more than 25,860 visitors in March of 2017. This Fiscal year to date, they have received more than 259,890 – an 8.5 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 81,300 non-commuter arrivals during March. Through the first nine months of FY 2017, the Amtrak system grew 3.6 percent compared to the same period last year.

BWI Airport

More than 9.3 million passengers arrived at BWI airport through March 2017. When compared to the same period last year, this represents a 2.7 percent increase. This growth is fueled by a 3.2 percent increase in domestic passengers.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew two tenths of a percent in March of 2017 compared to 2016. The total March 2017 employment in this sector is approximately 9.4 percent of the total employment in Maryland.

	March 2017	March 2016	Change
Arts, Entertainment, Recreation	40,000	40,000	0.0%
Accommodation	24,700	22,700	8.8%
Food Services	194,600	196,000	(0.7%)
Total	259,300	258,700	0.2%

Lodging

According to the latest data from STR, Inc., the number of rooms sold in Maryland in March 2017 increased 2.1 percent, while room revenue increased 5.9 percent. Compared to of March 2016, the occupancy rate declined from 64.5 to 63.9 percent; however, the average daily rate increased four dollars from \$111.5 to \$115.6.

Gaming Revenue (In Millions)

This fiscal year through March, gaming facilities generated more than one billion dollars in revenue, an increase of nearly 21 percent from last year's \$842.4 million.

Gaming Facility	FY 2017 YTD	FY 2016 YTD	Change
Hollywood, VLT	\$46.7	\$48.6	(3.9%)
Hollywood, Table	\$8.5	\$8.6	(1.2%)
Ocean Downs, VLT	\$43.9	\$42.7	2.8%
Maryland Live, VLT	\$285.7	\$305.5	(6.5%)
Maryland Live, Table	\$172.9	\$174.7	(1.0%)
Rocky Gap, VLT	\$33.2	\$30.2	9.9%
Rocky Gap, Table	\$5.7	\$4.9	16.3%
Horseshoe, VLT	\$129.6	\$123.2	5.2%
Horseshoe, Table	\$104.1	\$103.8	0.3%
MGM Harbor VLT	\$99.2	-	-
MGM Harbor Table	\$88.6	-	-
Combined Total	\$1,018.3	\$842.4	20.9%

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

Tourism Sales Tax Revenues

The first nine months of FY2017 have seen continued gains year over year in overall Tourism Tax Code Revenue. Tourism Tax categories increased 3.8 percent while sales tax contributions from all other categories only rose 1.9 percent. Tourism Tax Codes, the amount deemed attributable by the Comptroller, rose 4.7 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	\$295,173,524	\$285,914,021	3.2%	33%	\$98,391,175	\$95,304,674	3.2%
111 Hotels, Motels Selling Food - W/BWL	\$27,395,539	\$28,240,860	(3.0%)	100%	\$27,395,539	\$28,240,860	(3.0%)
112 Restaurants and Night Clubs - W/BWL	\$198,398,328	\$192,940,259	2.8%	33%	\$66,132,776	\$64,313,420	2.8%
306 General Merchandise	\$208,702,793	\$200,969,349	3.8%	5%	\$10,435,140	\$10,048,467	3.8%
407 Automobile, Bus and Truck Rentals	\$54,819,975	\$52,091,317	5.2%	90%	\$49,337,978	\$46,882,185	5.2%
706 Airlines - Commercial	\$242,076	\$527,726	(54.1%)	50%	\$121,038	\$263,863	(54.1%)
901 Hotels, Motels, Apartments, Cottages	\$86,298,655	\$77,738,500	11.0%	100%	\$86,298,655	\$77,738,500	11.0%
925 Recreation and Amusement Places	\$6,810,401	\$6,961,247	(2.2%)	50%	\$3,405,201	\$3,480,624	(2.2%)
Tourism Tax Categories Subtotal	\$877,841,290	\$845,383,279	3.8%	-	\$341,517,500	\$326,272,592	4.7%
<i>All Sales Tax Categories Subtotal</i>	<i>\$3,432,187,887</i>	<i>\$3,368,802,931</i>	<i>1.9%</i>				