

Maryland Tourism Monitor

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

Consumer Interactions

Print:

Through April 2017, both print and broadcast leads are outperforming year over year. Broadcast leads and print advertising requests have collectively increased more than 32 percent compared to the same time last fiscal year.

Request Type	FY 2017 YTD	FY 2016 YTD	Change
Print advertising requests	21,270	20,153	5.5%
Print ad budget	\$126,711	\$158,490	(-20.1%)
Broadcast leads	2,736	2,158	26.8%
Broadcast ad budget	\$348,911	\$497,445	(-29.9%)

Web:

Traffic to all OTD websites through the first ten months of FY17 continues to show strength – primarily driven by increases to Visitmaryland.org. Total unique traffic is up 40 percent year over year. OTD's requests for web travel kits are also up significantly from FY 16 with a 25 percent increase.

Interaction Type	FY 2017 YTD	FY 2016 YTD	Change
Web unique visitors*	2,106,314	1,504,834	40.0%
Web advertising clicks	450,187	712,753	(-36.8%)
Web travel kit requests	11,122	8,900	25.0%
Online advertising budget	\$112,167	\$252,008	(55.5%)

* 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 April of FY17, communications activities such as press outreach, familiarization tours and visiting journalists, including international media coverage, generated nearly \$12.4 million in advertising value for Maryland tourism products and services.

OTD has adopted industry principles of effective PR and communications measurements. The April scores for the relevant criteria were: Message (2.1), Tonality (3.0), Graphic (1.2), Outlet Tier (1.1), Geographic Market (1.2), & OTD initiative (1.2) – for a total of 9.7 out of 18*

* Each category is graded on a scale of 1-3 for a Maximum total of 18.

Social Media

The number of *TravelIMD* Facebook fans has grown 25.7 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 70 percent increase in followers compared to this time last year.

	FY 2017 YTD	FY 2016 YTD	Change
Facebook fans	38,427	30,578	25.7%
Twitter followers	40,175	35,797	12.2%
Instagram followers	37,367	21,963	70.1%

Partner Referrals & Outbound Clicks

Through the first ten months of FY17, nearly 236,516 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	12,114	119,814
Attractions	6,758	57,277
Accommodations	4,390	36,226
Dining	1,302	12,438
Arts & Culture	825	7,602
Shopping	199	1,121
Outdoor Recreation	171	894
Golf	92	638
Entertainment/Nightlife	30	281
Parks, Nature, Scenic	17	225

Welcome Centers

OTD-operated welcome centers received more than 34,850 visitors in April of 2017. This Fiscal year to date, these eight facilities have received more than 294,744– a 14 percent increase compared to FY16. The opening of previously closed welcome centers has driven this increase.

Amtrak

The Amtrak train system in Maryland recorded 83,900 non-commuter arrivals during April. Through the first ten months of FY 2017, the Amtrak system grew 5.3 percent compared to the same period last year.

BWI Airport

More than 1.1 million passengers arrived at BWI airport in April 2017. When compared to the same month last year, this represents a 3.8 percent increase. This growth is fueled by a 4.7 percent increase in domestic passengers which offsets a 10.4 decline in international passengers.

Leisure and Hospitality Employment

Employment in Maryland's Leisure and Hospitality sector grew one tenth of a percent in April of 2017 compared to 2016. The April 2017 employment in this sector is close to 10 percent of the total non-farm employment in Maryland.

	April 2017	April 2016	Change
Arts, Entertainment, Recreation	44,700	43,700	2.3%
Accommodation	26,200	23,900	9.6%
Food Services	198,400	201,500	(-1.5%)
Total	269,300	269,100	0.1%

Lodging

According to the latest data from STR, Inc., the number of rooms sold in Maryland in April 2017 decreased 1.6 percent with room revenue decreasing 3.2 percent. Compared to April 2016, the occupancy rate declined from 71.8 to 70 percent and the average daily rate also decreased almost two dollars from \$118.7 to \$116.7.

Gaming Revenue (In Millions)

This fiscal year through April, gaming facilities generated more than 1.3 billion dollars in revenue, an increase of 45.3 percent from last year's \$946.3 million.

Gaming Facility	FY 2017 YTD	FY 2016 YTD	Change
Hollywood, VLT	\$52.3	\$54.6	(4.2%)
Hollywood, Table	\$9.4	\$9.8	(4.1%)
Ocean Downs, VLT	\$48.7	\$47.4	2.7%
Maryland Live, VLT	\$314.4	\$340.5	(7.7%)
Maryland Live, Table	\$189.6	\$197.5	(4.0%)
Rocky Gap, VLT	\$37.1	\$33.8	9.8%
Rocky Gap, Table	\$6.4	\$5.6	14.3%
Horseshoe, VLT	\$143.3	\$139.0	3.1%
Horseshoe, Table	\$115.0	\$118.1	(-2.6%)
MGM Harbor VLT	\$125.4	-	-
MGM Harbor Table	\$112.3	-	-
Combined Total	\$1,375.1	\$946.3	45.3%

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

Tourism Sales Tax Revenues

The first ten months of FY2017 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 percent. Tourism Tax Codes, the amount deemed attributable by the Comptroller, rose 4.2 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	\$329,235,862	\$319,505,815	3.0%	33%	\$109,745,287	\$106,501,938	3.0%
111 Hotels, Motels Selling Food - W/BWL	\$30,558,636	\$31,899,377	(-4.2%)	100%	\$30,558,636	\$31,899,377	(-4.2%)
112 Restaurants and Night Clubs - W/BWL	\$222,364,918	\$216,396,456	2.8%	33%	\$74,121,639	\$72,132,152	2.8%
306 General Merchandise	\$230,835,725	\$221,507,202	4.2%	5%	\$11,541,786	\$11,075,360	4.2%
407 Automobile, Bus and Truck Rentals	\$60,281,147	\$57,707,552	4.5%	90%	\$54,253,032	\$51,936,797	4.5%
706 Airlines - Commercial	\$258,308	\$539,258	(-52.1%)	50%	\$129,154	\$269,629	(-52.1%)
901 Hotels, Motels, Apartments, Cottages	\$96,048,106	\$87,364,074	9.9%	100%	\$96,048,106	\$87,364,074	9.9%
925 Recreation and Amusement Places	\$7,551,214	\$7,655,857	(-1.4%)	50%	\$3,775,607	\$3,827,929	(-1.4%)
Tourism Tax Categories Subtotal	\$977,133,915	\$942,575,591	3.7%	-	\$380,173,248	\$365,007,255	4.2%
<i>All Sales Tax Categories Subtotal</i>	<i>\$3,812,205,373</i>	<i>\$3,738,791,393</i>	<i>2.0%</i>				