Howard County Tourism Council fy17
Annual Report

Sources of information contained in this report: Longwoods International Howard County 2016 Visitor Research Topline Report; Tourism Economics The Economic Impact of Tourism in Maryland Tourism Satellite Account Calendar Year 2015.
Tourism by the numbers in Howard County

Tourism labor income
$379.7M
+22.6% 5-year growth

Tourism industry sales
$653M
Food & beverage, recreation, and retail sales are higher in Howard County than the MD average:
MD F&B: 21.8%
MD retail: 14.2%
MD recreation: 8.9%

State and local taxes
$97M
Tax revenue generated by tourism supports the quality of living in Howard County by contributing to education, safety and services.

Full time jobs supported
11.12K
+12.1% 5-year growth

Second homes
1%
Transportation
22%
Recreation
16%
Retail
20%
Food and bev.
26%
Lodging
16%

Total visitors
2.82M
1.14M overnight / 1.68M daytrips
The average number of visitors to a Maryland county is 2.01M. More visitors come to Howard County than most other counties in Maryland.
**Visitor gender**
Howard County’s average visitor is similar to the USA destination average, which is split 50.8 male, 49.2 female.

**Average visitor age**
Howard County is visited more by 18-24 and 45-54 age travelers than the average USA destination.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Howard</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>16.3</td>
<td>13.1</td>
</tr>
<tr>
<td>25-34</td>
<td>22.0</td>
<td>22.5</td>
</tr>
<tr>
<td>35-44</td>
<td>17.1</td>
<td>20.1</td>
</tr>
<tr>
<td>45-54</td>
<td>17.2</td>
<td>15.4</td>
</tr>
<tr>
<td>55-64</td>
<td>13.3</td>
<td>11.6</td>
</tr>
<tr>
<td>65+</td>
<td>13.1</td>
<td>13.8</td>
</tr>
</tbody>
</table>

**Children in household**
Howard County visitors are more likely to have children of any age in their household than those visiting the average USA destination.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Howard</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>No children under 18</td>
<td>46</td>
<td>51.6</td>
</tr>
<tr>
<td>Any child between 13-17</td>
<td>27.4</td>
<td>22.4</td>
</tr>
<tr>
<td>Any child between 6-12</td>
<td>29.7</td>
<td>26.1</td>
</tr>
<tr>
<td>Any child under 6</td>
<td>19.3</td>
<td>18.6</td>
</tr>
</tbody>
</table>

**Household income**

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Howard</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$150K</td>
<td>3.9</td>
<td>6.3</td>
</tr>
<tr>
<td>$100-$149.9K</td>
<td>14.6</td>
<td>15.7</td>
</tr>
<tr>
<td>$75-$99.9K</td>
<td>17.4</td>
<td>16.6</td>
</tr>
<tr>
<td>$50-$74.9K</td>
<td>24.3</td>
<td>22.3</td>
</tr>
<tr>
<td>&lt;$49.9K</td>
<td>39.7</td>
<td>39</td>
</tr>
</tbody>
</table>
Howard County overnight trip characteristics

Size of party

- Howard:
  - Children: 0.8
  - Adults: 2.22
- USA:
  - Children: 1.9
  - Adults: 0.68

Origin (DMA) of trip

- NYC: 14.2%
- Baltimore: 11.1%
- DC: 10%
- Los Angeles: 5.7%
- Philadelphia: 4.8%
- Orlando: 4%
- Tampa: 3%

The majority of Howard County’s visitors come from these top seven city-regions.

Trip satisfaction

Trip satisfaction is the percentage of survey respondents who were satisfied with their experience. This data indicates opportunities for Howard County.

- Overall trip experience: 60.65%
- Friendliness of people: 50.7%
- Value for the money: 46.15%
- Quality of food: 48.25%
- Quality of accommodations: 42.25%
- Sightseeing and attractions: 41.35%
- Music, nightlife, and entertainment: 28.3%

Social media use

- Howard: 80.8%
- USA: 71.88%

Used any social media for travel

Trip purpose

- Visiting friends: 52%
- Special event: 9.5%
- Outdoors: 5.6%
- Touring: 5.4%
- City trip: 5.4%
- Theme park: 3%
- Resort: 2.9%
- Casino: 1.7%
- Other business: 5.6%
- Conference: 4.3%
- Business-leisure: 2.4%
## Activities and experiences

Survey respondents who spent at least one night in Howard County indicated they participated in the following activities. Visitors to Howard County enjoy the amenities of Howard County, but also visit experiences within the surrounding region during their overnight travel.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Howard</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>30.8</td>
<td>33</td>
</tr>
<tr>
<td>Fine dining</td>
<td>20.1</td>
<td>23</td>
</tr>
<tr>
<td>Museum</td>
<td>18.8</td>
<td></td>
</tr>
<tr>
<td>Landmark / historic site</td>
<td>17.6</td>
<td></td>
</tr>
<tr>
<td>National / state park</td>
<td>17.6</td>
<td></td>
</tr>
<tr>
<td>Bar / nightclub</td>
<td>15.7</td>
<td></td>
</tr>
<tr>
<td>Zoo</td>
<td>13.4</td>
<td></td>
</tr>
<tr>
<td>Winery</td>
<td>13.3</td>
<td></td>
</tr>
<tr>
<td>Swimming</td>
<td>11.5</td>
<td></td>
</tr>
<tr>
<td>Casino</td>
<td>10.5</td>
<td></td>
</tr>
<tr>
<td>Theater</td>
<td>9.7</td>
<td></td>
</tr>
<tr>
<td>Spa</td>
<td>9.5</td>
<td></td>
</tr>
<tr>
<td>Theme park</td>
<td>8.6</td>
<td></td>
</tr>
<tr>
<td>Brewery</td>
<td>8.1</td>
<td></td>
</tr>
<tr>
<td>Dance</td>
<td>7.7</td>
<td></td>
</tr>
<tr>
<td>Hiking / backpacking</td>
<td>7.5</td>
<td></td>
</tr>
<tr>
<td>Business meeting</td>
<td>7.4</td>
<td></td>
</tr>
<tr>
<td>Fishing</td>
<td>7.4</td>
<td></td>
</tr>
<tr>
<td>Attend kids sports</td>
<td>7.3</td>
<td></td>
</tr>
<tr>
<td>Biking</td>
<td>6.8</td>
<td></td>
</tr>
<tr>
<td>Fair / exhibition / festival</td>
<td>6.7</td>
<td></td>
</tr>
<tr>
<td>Art gallery</td>
<td>6.2</td>
<td></td>
</tr>
<tr>
<td>Conference / convention</td>
<td>5.9</td>
<td></td>
</tr>
<tr>
<td>Rock / pop concert</td>
<td>5.8</td>
<td></td>
</tr>
<tr>
<td>Rafting</td>
<td>5.6</td>
<td></td>
</tr>
<tr>
<td>Rodeo</td>
<td>5.2</td>
<td></td>
</tr>
<tr>
<td>Motorcycle touring</td>
<td>5.0</td>
<td></td>
</tr>
</tbody>
</table>

Howard County overnight trip characteristics (con't)
Visit Howard County marketing highlights

Total marketing impressions

13.8M

Visit Howard County aggressively markets the activities that make Howard County an exciting place to live and visit. Social is proving to be an exceptional method for getting in front of qualified audiences. Other advertising include estimates of views for campaigns launched in the Washington Post, Philadelphia Magazine, and actual numbers from digital campaigns on Adara’s ad network, iHeartMedia’s online network and more.

Site users

187.2K

+88% fy16 to fy17

Better qualified advertising leads to more people clicking on links to the website.

Site pageviews

628K

+96.9% fy16 to fy17

Better qualified advertising leads to longer times spent researching things to do.

Social impressions

5.87M

+1,028% fy16 to fy17

79% of online adults actively use Facebook (Pew 2016) and 80% of visitors use social media to plan their trips.

Visit Howard County is more actively using social media to target qualified visitors and residents to share knowledge of the activities that make Howard County a great place to visit and live.

Impressions are an important measurement showing the number of potential customers that are served our message.

<table>
<thead>
<tr>
<th>FY16</th>
<th>FY17</th>
</tr>
</thead>
<tbody>
<tr>
<td>5,900,000</td>
<td>5,900,000</td>
</tr>
<tr>
<td>4,425,000</td>
<td>4,425,000</td>
</tr>
<tr>
<td>2,950,000</td>
<td>2,950,000</td>
</tr>
<tr>
<td>1,475,000</td>
<td>1,475,000</td>
</tr>
</tbody>
</table>
Visit Howard County special initiatives and projects

Strategic plan
Completed a three-year strategic plan with input from the Board of Directors and community partners that aspires to take our organization and community to the next level.

New marketing pieces
Launched a new website that focuses on mobile use; a new visitor guide format; meeting planner guide; Harvest Howard County magazine, and more.

Leisure events and attractions
Visit Howard County supports spending at shopping, restaurants, attractions and hotels throughout the County by advertising to visitors, potential and current residents.

Through marketing and grants supported events like Historic Savage Mill's bicentennial celebration, the Crossland Festival, the Patapsco Trail Fest, the Maryland Sheep & Wool Festival, Symphony of Lights, Merriweather Post Pavilion events, the Maryland Preakness Celebration Balloon Festival, Hops and Harvest, and many more.

Supported Old Ellicott City through marketing of events, direct grants, and creating EllicottCityHolidays.com: spread attention to re-opening businesses through millions of impressions. Promoted Columbia's 50th celebration events and Columbia's #1 Place to Live award.

Awards
Won several awards including the "Best Digital Campaign" by the Maryland Tourism Coalition for HoCoMon, "Best Print Material" award from the Maryland Tourism Coalition for Harvest Howard County, and the Executive Director was one of a dozen people in North America to gain the Certified Destination Management Executive credential.

Media tours
Hosted several media tours, produced stories and hosted a tour of Howard County's group attractions with international motorcoach planners from the IPW conference.

Tournaments
Provided resources and services to tournaments generating thousands of room nights including the Summer Smash Field Hockey Tournament, National High School Lacrosse Showcase, NJCCA Track and Field Competition, the Elite Tournaments' numerous events, the Mid-Atlantic Affiliate Challenge, multiple USSSA tournaments, events produced by Recreation and Parks, and more.

Brand Howard County
Called together a group of some of the largest organizations in Howard County to begin discussions towards branding our organizations alike to promote Howard County in a unified voice.
Dozens of media stories placed

"...the indie shopping is crazy good."

Source: 8 Weird, Wacky, and Compelling Reasons to Visit These Mid Atlantic Destinations Now; Malerie Yolen-Cohen, HuffPost

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BRIT+CO.
8 Unique and Relaxing Getaways Every Mom Squad Needs This Fall

COSMOPOLITAN
Where to Vacation with Your BFFs in Every State

MEN'S JOURNAL
20 Breweries That Grow Their Own Hops

GETAWAY mavens
20 Most Popular Towns in Northeast USA in 2016

THE HUFFINGTON POST
7 Great Historic Upscale Lodgings in Northeast USA
Visit Howard County media placements

Tourism council membership
335
+53.6% fy16 to fy17

Visit Howard County's membership brings the hospitality community together through educational seminars, promotion efforts, and cooperative marketing.

By empowering this community to work together, get engaged, and remain informed Visit Howard County is able to better promote our community and provide for an improved tourist experience.

Revenue

- Membership: 1%
- Co-ops: 3%
- State grant: 6%
- Other: 1%
- Hotel tax: 89%

Expenses

- Other: 2%
- Mgmt. and gen.: 15%
- Visitor services: 13%
- Tourism dev.: 20%
- Group sales: 13%
- Marketing: 36%