Maryland Office of Tourism Development & Marriner Marketing

Ad Effectiveness & ROI Study (Pre-Campaign)

Presentation of Findings
July 2019

Research prepared for Maryland Office of Tourism Development & Marriner Marketing by:

Destination Analysts

Research Overview

In this presentation we will review the findings of a study of American leisure travelers from key markets conducted by Destination Analysts on behalf of the Maryland Office of Tourism & Development and its agency, Marriner Marketing. This online survey-based research was conducted before the commencement of the Maryland Office of Tourism & Development's FY 2019 advertising campaign.

The primary objective of this pre and post study was to measure impact and awareness of the Maryland Office of Tourism's media campaign as well as identify key drivers for overnight visitation to the state. Additionally, the research was designed to benchmark travelers':

- Awareness of and familiarity with Maryland as a leisure travel destination
- Rates of past visitation and likelihood to visit the state in the future
- Current perceptions of the state as a leisure travel destination
- Motivations for visiting Maryland and trip activities desired
- Awareness of Maryland travel advertising
- Earned and paid media recall

Methodology

Destination Analysts worked closely with Marriner Marketing to develop a questionnaire to address these informational goals as well other insights desired. Using the domestic panel of survey sample provider Dynata, an online survey invitation was sent to adult Americans from Maryland's key feeder markets (DMAs): Baltimore, Cincinnati, Cleveland, Columbus, District of Columbia, Harrisburg/Lancaster, New York, Philadelphia and Pittsburgh. Albany was also included in the survey sample to serve as a control market to ensure any measurable brand lift observed in the markets of study in the post-campaign survey can be attributed to the advertising campaign and not other external factors. Respondents were then screened for the following qualifications:

- Aged between 25-72 years old
- Minimum household income of $60K
- Traveled overnight for leisure in the last 12 months
- Stayed in hotel accommodations at least one night for one or more leisure trips in the past year

Diversity in the sample was important so the survey sampling strategy targeted a mix of respondents by gender, age and ethnicity.

The survey was fielded February 13th through March 13th, 2019. In total, 1,605 complete surveys were collected.
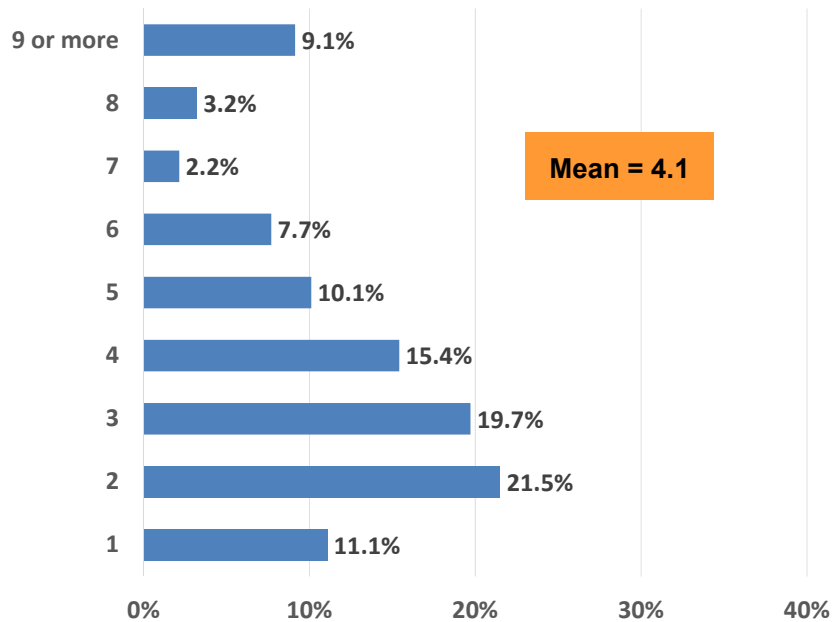
DETAILED FINDINGS

Respondent Profile

Overnight Leisure Trips/Accommodations Used for Past Overnight Trips

Figure 1: Overnight Leisure Trips Taken in Past Year

Trips	Percentage
9 or more	9.1%
8	3.2%
7	2.2%
6	7.7%
5	10.1%
4	15.4%
3	19.7%
2	21.5%
1	11.1%

Mean = 4.1

Question: In the past 12 months, how many overnight leisure trips have you taken? Please include only OVERNIGHT trips of 50 miles or more (one way) from your home.
Base: All respondents. 1,605 responses.

Figure 2: Accommodations Used for Past Overnight Trips

Accommodation	Percentage
Hotel	93.8%
Private residence of friend or family member	29.7%
Resort	24.0%
Motel	16.7%
Airbnb or similar peer-to-peer lodging	14.3%
Vacation home rental	10.8%
Bed-and-breakfast	7.4%
Cabin, lodge or cottage	7.3%
Campground	3.0%
Sailing vacation (bareboat or captained charters)	3.0%
Other	4.9%
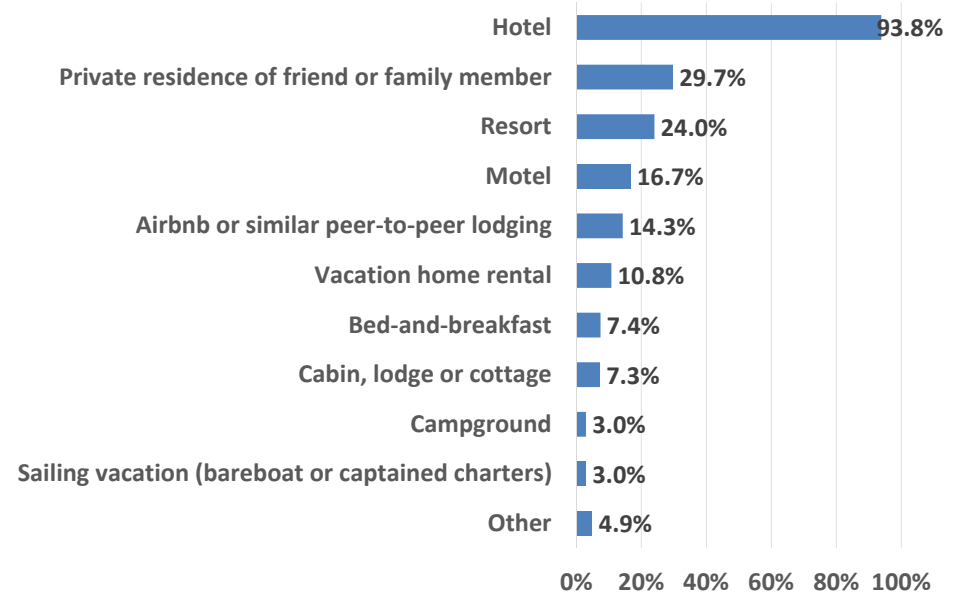
Question: Which type(s) of accommodations did you stay in on these overnight leisure trips? (Select all that apply) Base: All respondents. 1,605 responses.

Anticipated Overnight Trips/Anticipated Overnight Trips to Out-of-State Destinations

Figure 3: Anticipated Overnight Trips in the Next Year

9 or more 9.0%
8 2.5%
7 1.8%
6 7.1%
5 9.0%
4 14.6%
3 20.6%
2 24.0%
1 11.3%

Mean = 4.0
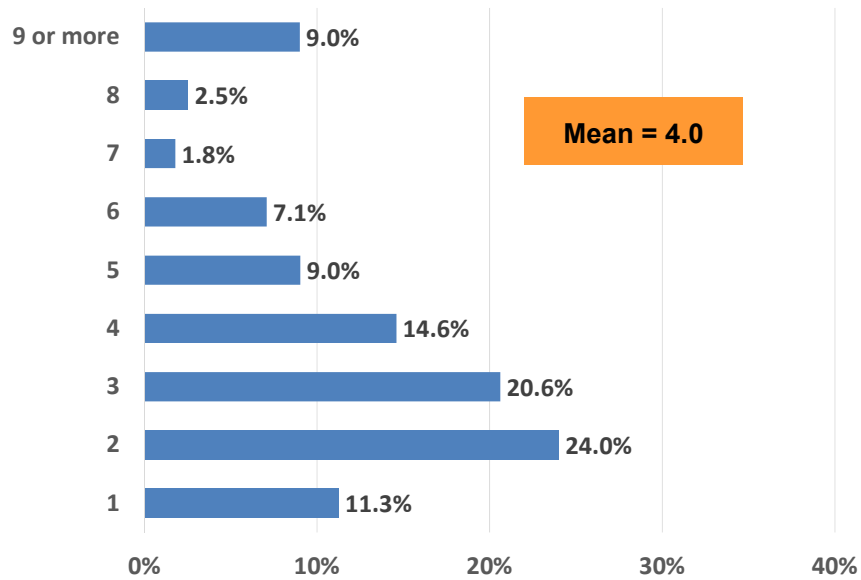
Question: In the next 12 months, how many overnight leisure trips do you plan to take?
Please include only OVERNIGHT trips of 50 miles or more (one way) from your home.
Base: All respondents. 1,605 responses.

Figure 4: Anticipated Overnight Trips to Out-of-State Destinations in the Next Year

9 or more 6.8%
8 2.7%
7 2.2%
6 4.4%
5 7.3%
4 13.3%
3 20.4%
2 25.2%
1 15.1%
0 2.5%

Mean = 3.5
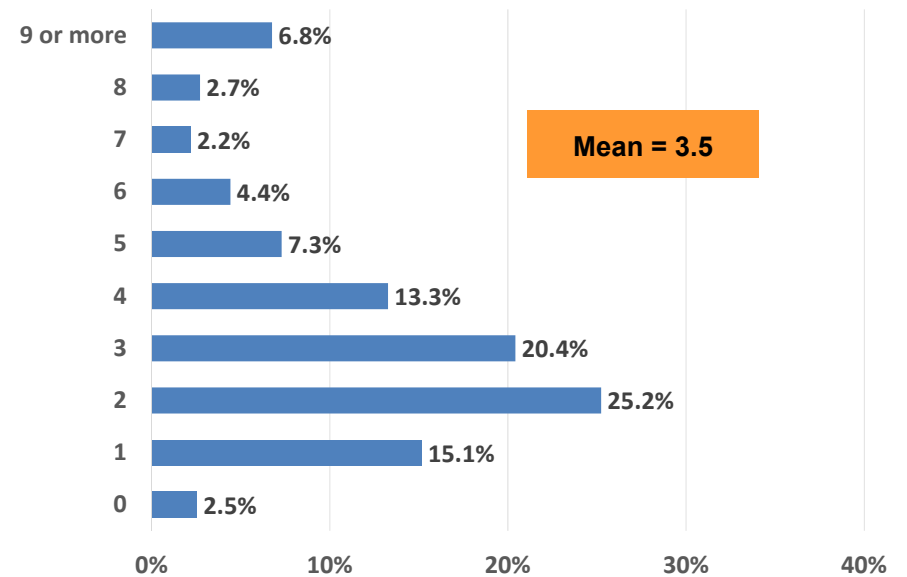
Question: How many of these overnight leisure trips will be to destinations outside your primary state of residence? Base: All respondents. 1,605 responses.

Importance of Attributes to Destination Selection Process

Figure 5: Importance of Attributes to Destination Selection Process – Top Two Box Score

Legend: ■ 4   ■ 5 – Very important

Attribute	4	5 – Very important
Safety	27.9%	56.2%
Opportunities to relax	38.7%	41.4%
Opportunities to bond with my family	32.2%	40.1%
Varied landscapes and natural beauty	42.5%	28.6%
An abundant coastline and water-based activities	36.9%	26.2%
Distinctive towns and neighborhoods	39.6%	20.0%
Scenic drives	36.2%	22.2%
A diverse culinary scene featuring local favorites	38.3%	17.9%
Unique cultural history and heritage	34.2%	20.5%
An ideal destination for a holiday weekend	37.0%	17.7%
Museums and historical sites	34.4%	20.0%
A variety of outdoor activities	34.4%	19.4%
Discounts for hotels/attractions	31.0%	21.9%
Local seafood	31.1%	18.0%
A destination where it is easy to extend my trip if need be	31.9%	14.1%
Cultural events	31.0%	12.8%
A wealth of arts institutions and cultural events	30.3%	12.1%
Theme parks/family-friendly activities	22.3%	13.2%
Local breweries/distilleries/wineries	21.9%	10.6%
One-of-a-kind shopping experiences	19.3%	9.1%
A stop between two destinations	19.2%	7.5%
Music festivals	16.6%	7.3%
A destination that is easy to add on to a business trip	14.0%	6.9%
Access to professional sports	13.8%	5.4%

Question: Please think about your process for selecting destinations to visit for your overnight leisure trips. How important are each of the following attributes and offerings to you? Please evaluate each using the five-point scale below in which "1" represents "totally unimportant" and "5" represents "very important." Base: All respondents. 1,605 responses.
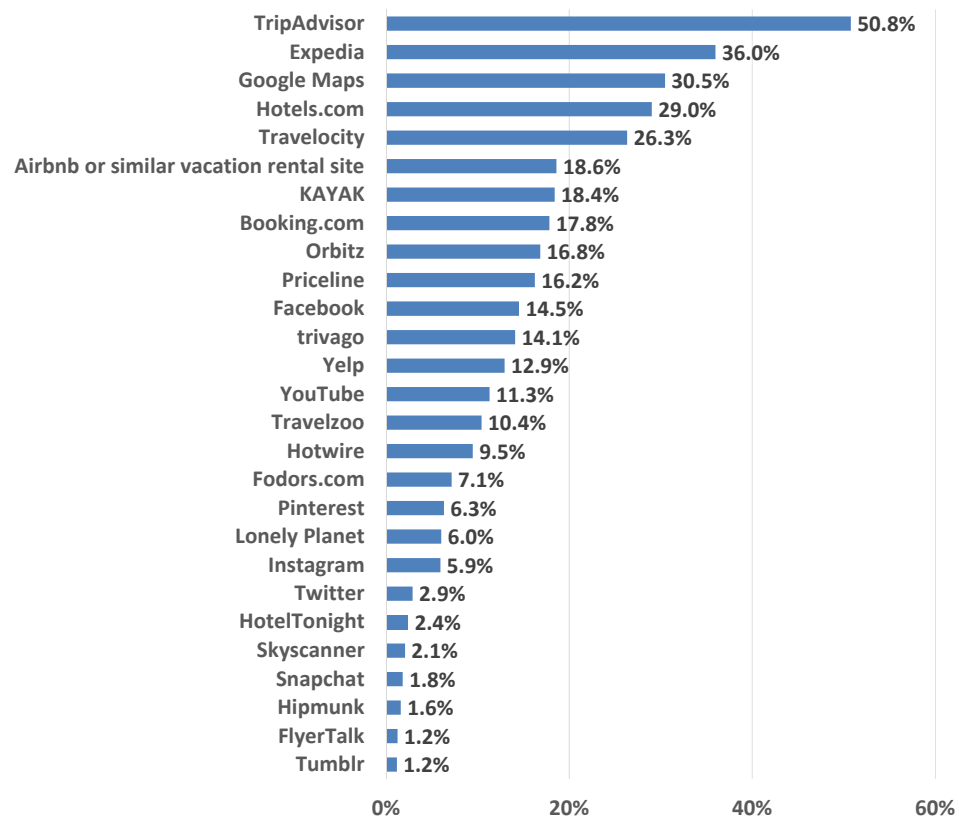
Sources of Destination Inspiration/Travel Planning Resources

Figure 6: Sources of Destination Inspiration

Source	Percentage
Friends/family through direct contact	59.7%
Online searches	49.2%
Travel-planning websites	36.6%
Official destination/tourism websites	29.0%
Magazine/newspaper article—in print	28.1%
Travel agencies—online	22.7%
Magazine/newspaper article—online	20.1%
Television program(s)—traditional broadcast	18.7%
Advertising—in print	16.1%
Travel-planning apps	14.1%
Advertising—online	13.8%
Posts from those I follow on social networking sites	13.7%
Advertising - televised	13.4%
Films/movies	13.3%
Television program(s)—streaming	13.1%
Travel agencies—traditional	11.7%
Email newsletter(s)	11.0%
Advertising on social networking sites	10.3%
Video—online	7.7%
Blogs	5.4%
Radio advertising—traditional	4.1%
Radio program(s)—traditional	3.5%
Radio advertising—streaming	3.1%
Radio program(s)—streaming	2.7%
Podcasts	2.4%
Other	7.5%

Question: How do you typically get ideas for destinations to visit for leisure? (Select all that apply) Base: All respondents. 1,605 responses.
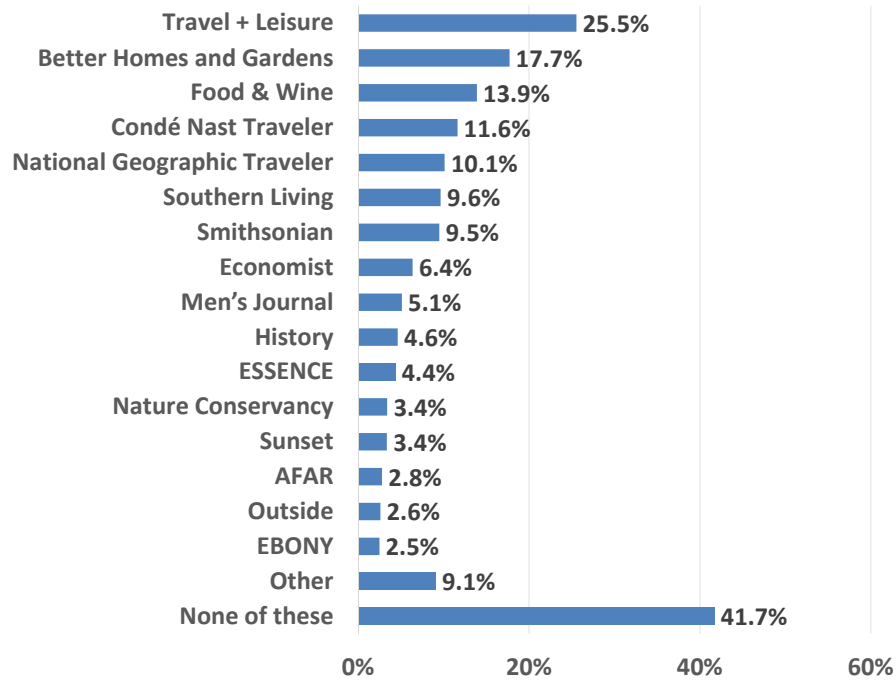
Figure 7: Travel Planning Resources

Resource	Percentage
TripAdvisor	50.8%
Expedia	36.0%
Google Maps	30.5%
Hotels.com	29.0%
Travelocity	26.3%
Airbnb or similar vacation rental site	18.6%
KAYAK	18.4%
Booking.com	17.8%
Orbitz	16.8%
Priceline	16.2%
Facebook	14.5%
trivago	14.1%
Yelp	12.9%
YouTube	11.3%
Travelzoo	10.4%
Hotwire	9.5%
Fodors.com	7.1%
Pinterest	6.3%
Lonely Planet	6.0%
Instagram	5.9%
Twitter	2.9%
HotelTonight	2.4%
Skyscanner	2.1%
Snapchat	1.8%
Hipmunk	1.6%
FlyerTalk	1.2%
Tumblr	1.2%

Question: Which of the following resources do you use to plan leisure travel? (Select all that apply) Base: All respondents. 1,605 responses.

Publications Travelers Read
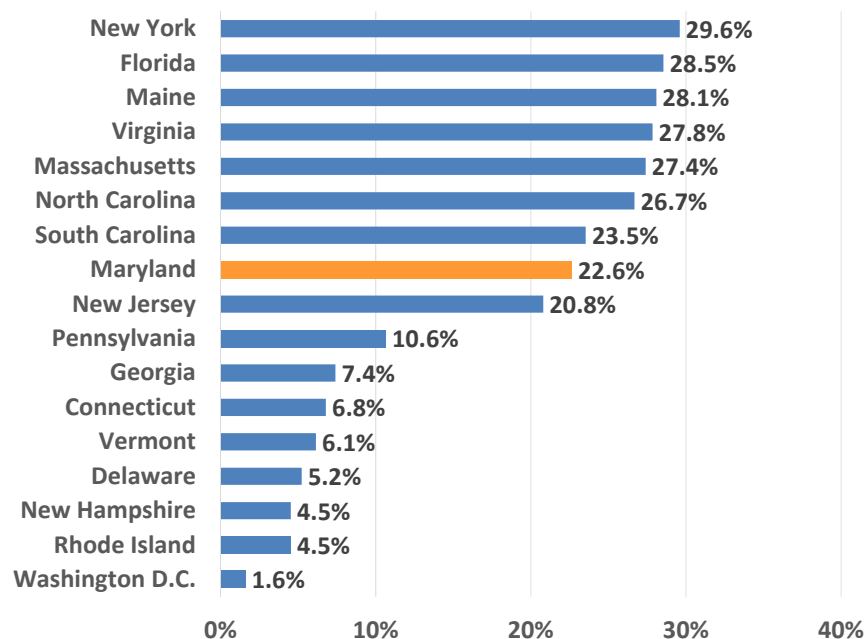
Figure 8: Publications Travelers Read

Publication	Percentage
Travel + Leisure	25.5%
Better Homes and Gardens	17.7%
Food & Wine	13.9%
Condé Nast Traveler	11.6%
National Geographic Traveler	10.1%
Southern Living	9.6%
Smithsonian	9.5%
Economist	6.4%
Men's Journal	5.1%
History	4.6%
ESSENCE	4.4%
Nature Conservancy	3.4%
Sunset	3.4%
AFAR	2.8%
Outside	2.6%
EBONY	2.5%
Other	9.1%
None of these	41.7%

Question: Which of the following publications do you read (digital or print)?
(Select all that apply) Base: All respondents. 1,605 responses.

Top-of-Mind Destinations with Maryland's Attributes/ Familiarity

Figure 9: Top-of-Mind East Coast Destinations with Maryland's Attributes (Unaided)

Destination	Percentage
New York	29.6%
Florida	28.5%
Maine	28.1%
Virginia	27.8%
Massachusetts	27.4%
North Carolina	26.7%
South Carolina	23.5%
Maryland	22.6%
New Jersey	20.8%
Pennsylvania	10.6%
Georgia	7.4%
Connecticut	6.8%
Vermont	6.1%
Delaware	5.2%
New Hampshire	4.5%
Rhode Island	4.5%
Washington D.C.	1.6%

Question: Please think about the East Coast of the United States as a region for overnight leisure travel. Now think about travel destinations within the East Coast that specifically feature the following attributes: Abundant land and water-based outdoor activities, Varied landscapes—from cities to oceans to mountains, A diverse culinary scene featuring seafood and other local favorites, Rich in history and historic sites, Welcoming culture. Please list the first three East Coast STATES that come to mind as fitting this description. Base: All respondents. 1,573 responses.

Figure 10: Familiarity with Leisure Offerings

Legend:
- I know a lot about this state as a leisure destination.
- I know almost everything about this state as a leisure destination.

State	I know a lot	I know almost everything
Florida	51.5%	13.6%
New York	36.8%	22.9%
New Jersey	28.2%	20.1%
Pennsylvania	30.1%	17.0%
District of Columbia	31.8%	11.6%
Maryland	25.4%	13.9%
Virginia	27.1%	6.7%
North Carolina	25.6%	5.3%
Massachusetts	25.2%	5.1%
South Carolina	21.0%	4.8%
Ohio	13.4%	11.7%
Maine	18.1%	3.8%
Delaware	17.4%	2.9%
Georgia	15.5%	4.0%
Connecticut	14.8%	3.5%
Vermont	13.6%	3.3%
West Virginia	11.7%	3.5%
New Hampshire	11.4%	2.6%
Rhode Island	11.1%	2.4%
Michigan	9.9%	2.9%
Illinois	8.0%	2.4%

Question: How much do you know about each of the following as a destination for leisure travel? Base: All respondents. 1,605 responses.
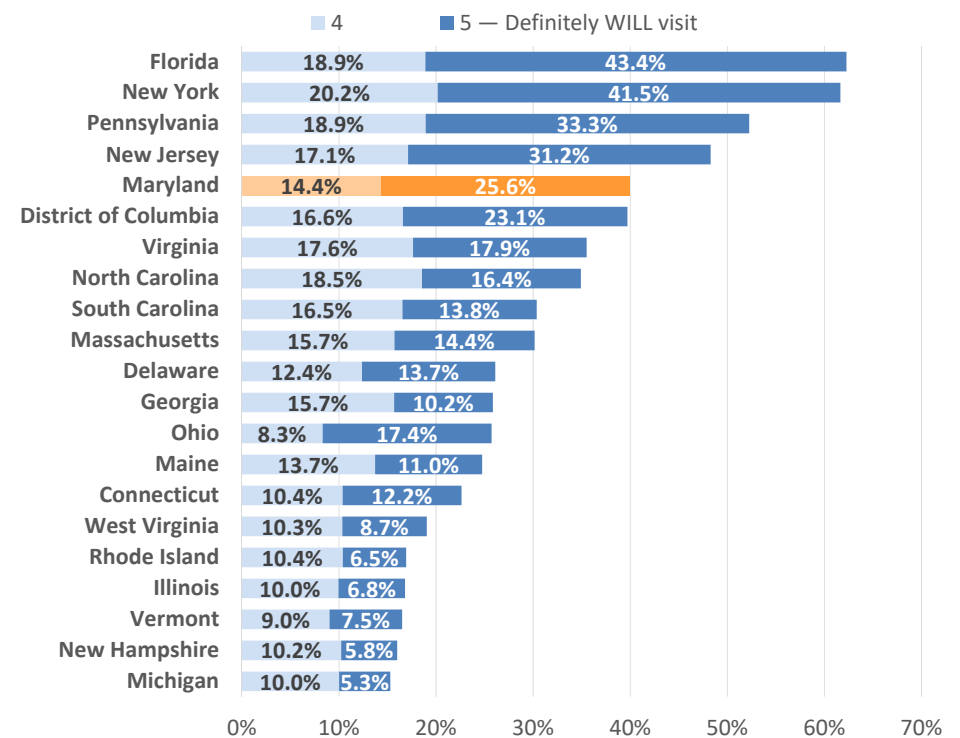
States Visited for Leisure in Past Five Years/Likelihood to Visit in the Next Year

Figure 11: States Visited for Leisure in Past Five Years

State	Percentage
Florida	59.8%
New York	57.9%
Pennsylvania	53.6%
New Jersey	48.7%
Maryland	38.5%
Virginia	35.0%
District of Columbia	33.7%
North Carolina	27.6%
Massachusetts	27.5%
South Carolina	26.4%
Delaware	24.8%
Connecticut	24.3%
Ohio	22.6%
Georgia	19.4%
Maine	15.8%
West Virginia	15.2%
Illinois	13.6%
Michigan	11.8%
New Hampshire	11.0%
Rhode Island	10.9%
Vermont	10.5%
None of the above	1.0%
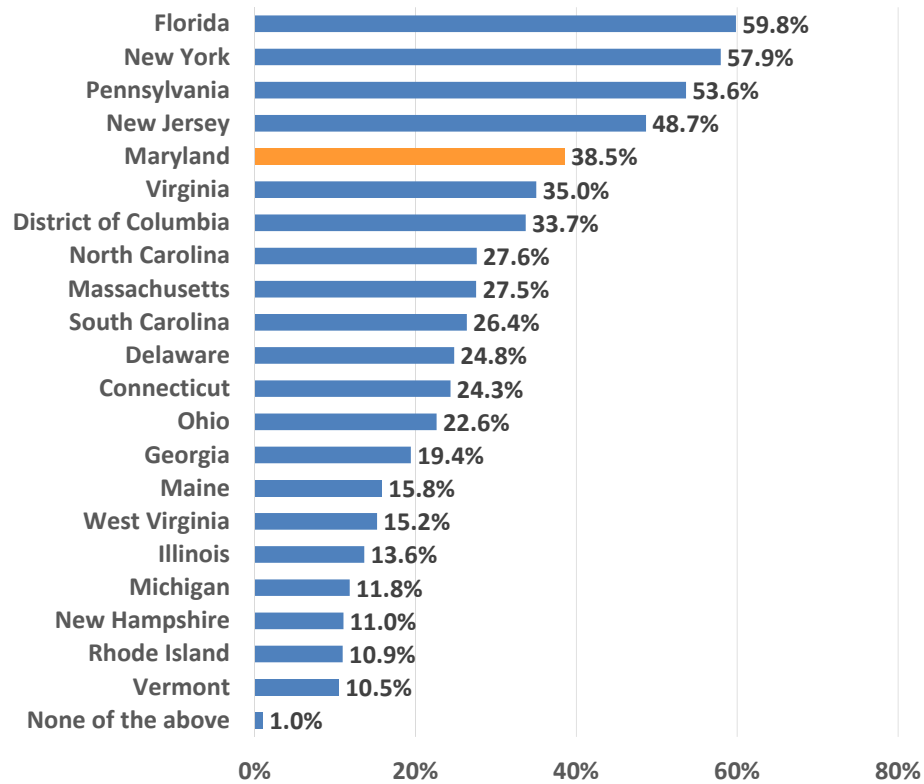
Question: In the past five years, which of the following have you taken a leisure trip within? (Select all that apply) Base: All respondents. 1,605 responses.

Figure 12: Likelihood to Visit in the Next Year

Legend: ☐ 4   ■ 5 — Definitely WILL visit

State	4	5 — Definitely WILL visit
Florida	18.9%	43.4%
New York	20.2%	41.5%
Pennsylvania	18.9%	33.3%
New Jersey	17.1%	31.2%
Maryland	14.4%	25.6%
District of Columbia	16.6%	23.1%
Virginia	17.6%	17.9%
North Carolina	18.5%	16.4%
South Carolina	16.5%	13.8%
Massachusetts	15.7%	14.4%
Delaware	12.4%	13.7%
Georgia	15.7%	10.2%
Ohio	8.3%	17.4%
Maine	13.7%	11.0%
Connecticut	10.4%	12.2%
West Virginia	10.3%	8.7%
Rhode Island	10.4%	6.5%
Illinois	10.0%	6.8%
Vermont	9.0%	7.5%
New Hampshire	10.2%	5.8%
Michigan	10.0%	5.3%

Question: On a five-point scale, where "1" represents "Definitely will NOT visit" and "5" represents "Definitely WILL visit," what is the likelihood that you will visit each of the following in the next year? Base: All respondents. 1,605 responses.

Reasons for Being Likely to Visit Maryland in the Next Year

Figure 13: Reasons for Being Likely to Visit Maryland in the Next Year

Reason	Percentage
Family/Friends in the state	15.3%
Convenient location	15.1%
A good/enjoyable place	9.6%
Beach/Coast	9.6%
To visit Ocean City	5.6%
Vacation	4.7%
Lots to do and see	4.4%
Dining/Seafood	4.4%
To explore/experience Maryland	4.0%
Outdoor Activities	4.0%
To visit Baltimore	2.6%
Sporting Events	1.9%
Interesting/New	1.8%
History	1.8%
Passing through	1.7%
Relaxing	1.6%
Beautiful	1.5%
Crabs	1.0%
Inner Harbor	1.0%
To visit Annapolis	1.0%
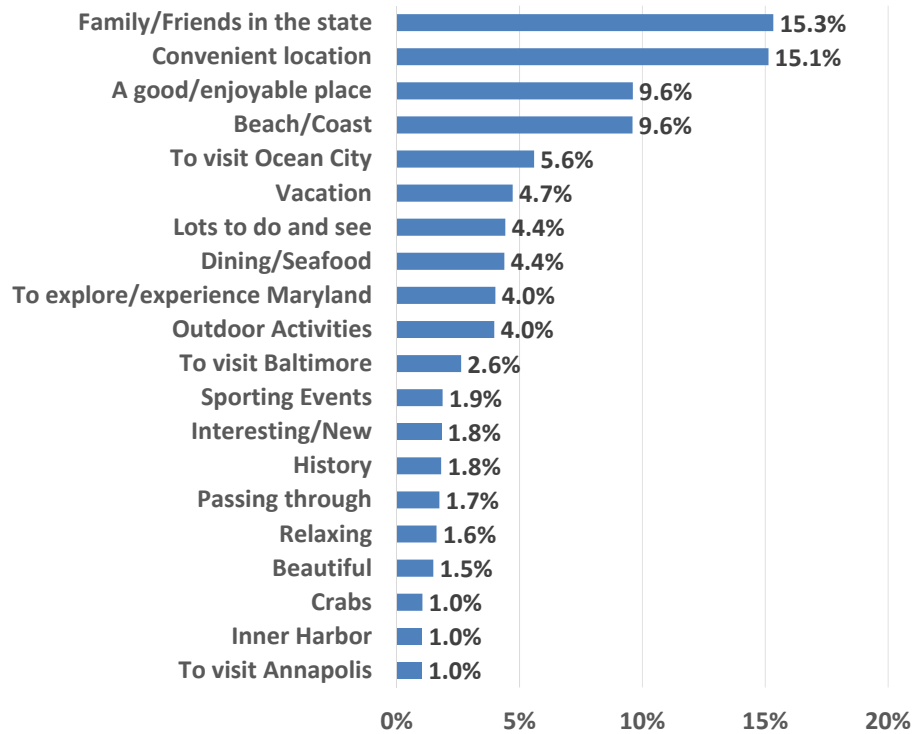
Question: In a previous question, you responded that you were likely to visit Maryland in the next year. Please briefly share and describe your reason(s). Base: All respondents. 602 responses.

Advertising Recall (Past 6 Months)—Aided

Figure 14: Advertising Recall (Past 6 Months)—Aided
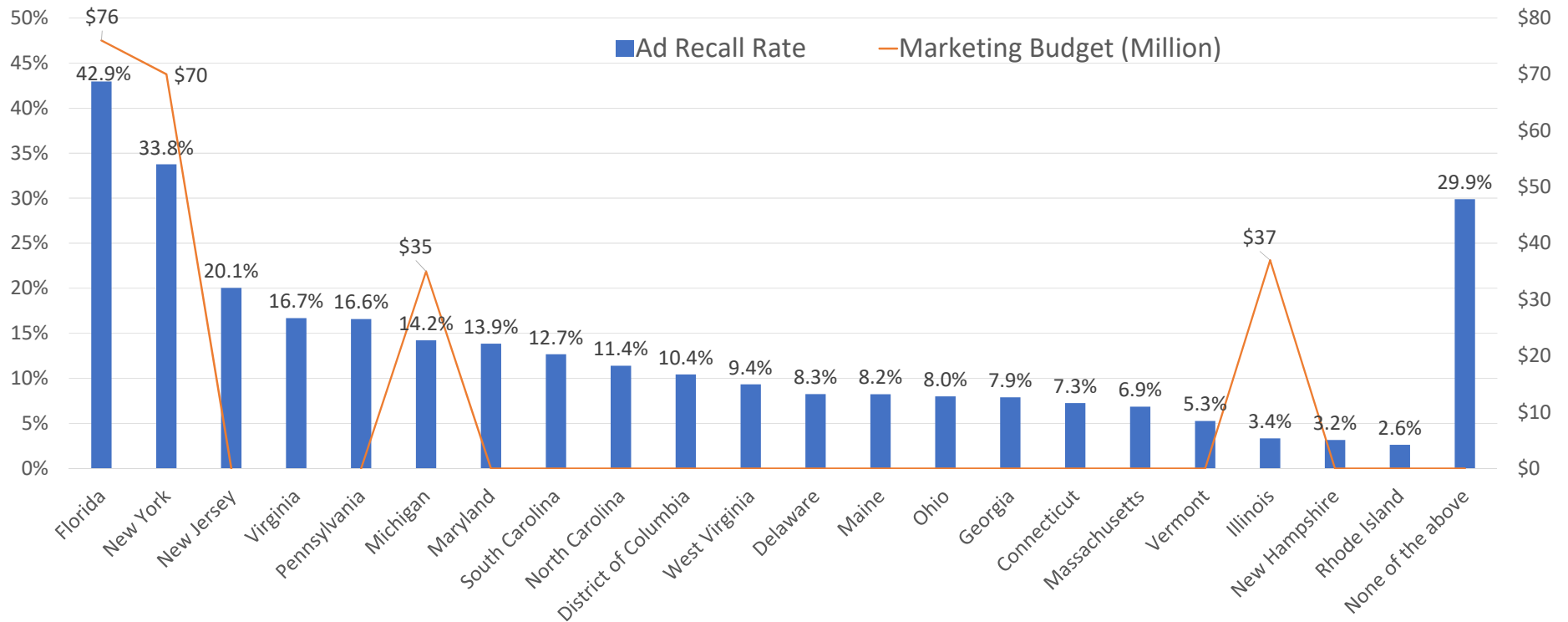
Question: Which of the following have you seen or heard travel-related advertising for in the past three to six months? (Select all that apply) Base: All respondents. 1,605 responses.

The Maryland Destination Brand

Top-of-Mind Associations with Maryland (Unaided)

Figure 15: Top-of-Mind Associations with Maryland (Unaided)

Association	Percentage
Baltimore, MD	34.8%
Ocean/Beach	30.0%
Ocean City, MD	22.9%
Restaurants/Food	17.7%
Crabs	15.2%
Annapolis, MD	14.8%
History	8.5%
Chesapeake Bay	8.1%
Inner Harbor	7.2%
Outdoor recreation	6.9%
Professional Sports	5.4%
Accessible	4.8%
District of Columbia	4.4%
Aquarium/Zoo	3.9%
National/State Parks	3.7%
Scenic landscapes	2.2%
Education	2.2%
Shopping	2.1%
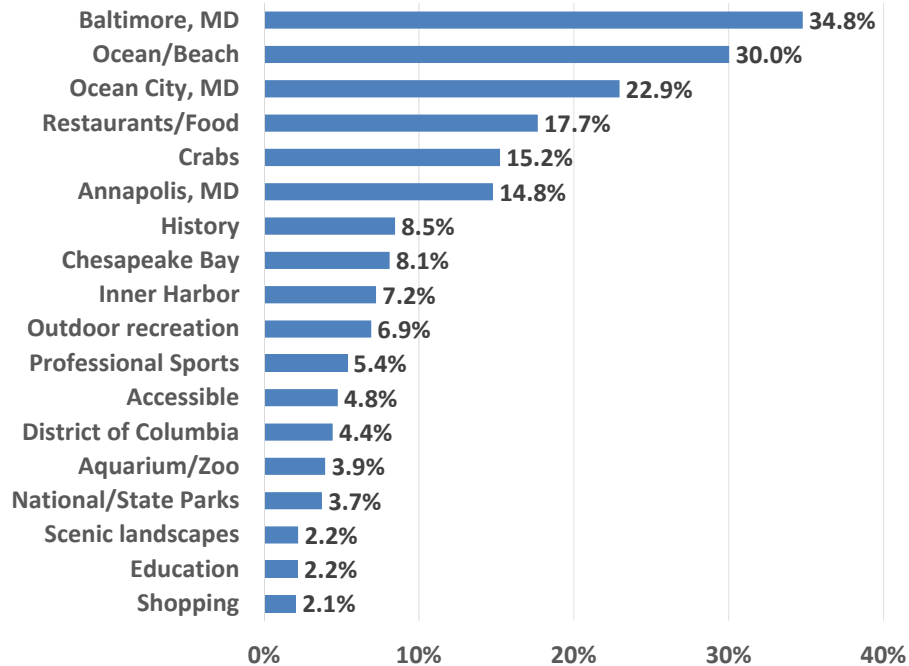
Question: Now please think specifically about the state of Maryland as a place to visit for leisure trips. What first comes to mind? Even if you are unfamiliar with Maryland as a leisure travel destination, please respond according to your current perceptions. Base: All respondents. 1,503 responses.

Maryland Ad Recall: Advertising Medium/Earned Media Recall

Figure 16: Maryland Ad Recall—Advertising Medium

Medium	Percent
Television—traditional	50.8%
Magazine	33.0%
Travel-related website	24.9%
Facebook	24.5%
Television¬—streaming	19.9%
Radio—traditional	17.7%
Newspaper	17.2%
Search engine	13.8%
Billboard/bus ad/train	12.0%
Travel agency—online	11.8%
Event	11.1%
Instagram	9.5%
Other social media	8.9%
Radio—streaming	8.1%
Smartphone or other mobile channel	7.9%
Other website	7.8%
Video—online	7.2%
Email newsletter	6.6%
Pinterest	6.4%
Twitter	5.4%
App	3.8%
Blog	3.8%
Podcast	2.1%
Snapchat	1.9%
Other	1.6%
I don't remember	4.6%

Question: In the previous question, you indicated that you have recently seen or heard advertising for Maryland. Where did you see or hear this advertising? Base: All respondents. 1,605 responses.

Figure 17: Earned Media Recall

Medium	Percent
Friends/family through direct contact	13.4%
Television program—traditional	11.9%
Magazine/newspaper article—in print	10.0%
Online searches	7.3%
Social media	6.9%
Magazine/newspaper article—online	6.2%
Travel-planning websites	6.2%
Official destination/tourism websites	5.9%
Travel agencies—online	5.3%
Television program—streaming	4.2%
Radio program—traditional	3.8%
Travel agencies—traditional	3.6%
Travel-planning apps	3.5%
Video—online (YouTube, etc.)	3.2%
Email newsletter(s)	2.6%
Films/movies	2.6%
Radio program—streaming	1.9%
Blogs	1.5%
Podcasts	0.7%
Other	1.7%
I don't remember	59.7%

Question: Other than advertising, do you recall recently seeing, hearing and/or reading about the state of Maryland as a travel destination in any of the following? (Select all that apply) Base: All respondents. 1,605 responses.

Maryland Destination Attribute Association Rating

Figure 18: Maryland Destination Attribute Association Rating—Top Two Box Score

■ 4   ■ 5 – Strongly associate with Maryland

Attribute	4	5
Local seafood	27.5%	52.5%
An abundant coastline and water based activities	32.0%	34.5%
A variety of outdoor activities	35.7%	19.2%
Distinctive towns and neighborhoods	34.4%	18.8%
Varied landscapes and natural beauty	32.5%	19.7%
A diverse culinary scene featuring local favorites	34.6%	17.4%
Museums and historical sites	31.7%	20.0%
Scenic drives	31.9%	18.1%
Unique cultural history and heritage	32.4%	17.5%
A destination where it is easy to extend my trip if need be	29.9%	19.4%
Opportunities to relax and recharge	29.9%	19.1%
Safety	32.3%	15.5%
Opportunities to bond with my family	26.1%	20.7%
A stop between two destinations	26.6%	19.6%
An ideal destination for a holiday weekend	27.6%	18.5%
Access to professional sports	24.2%	17.3%
A wealth of arts institutions and cultural events	25.7%	12.2%
Cultural events	24.8%	12.1%
A destination that is easy to add on to a business trip	21.8%	13.8%
Discounts for hotels and attractions	22.0%	10.3%
Local breweries/distilleries/wineries	20.2%	10.8%
Fun theme parks and family-friendly activities	17.0%	8.0%
Music festivals	15.1%	7.2%
One-of-a-kind shopping experiences	12.9%	7.3%

Question: Please rate Maryland for each of the following attributes using the five-point scale below, in which "1" represents "Do not associate at all with Maryland" and "5" represents "Strongly associate with Maryland." Base: All respondents. 1,605 responses.

Most Motivational Attributes for Visiting Maryland

Figure 19: Most Motivational Attributes for Visiting Maryland

Attribute	Percentage
Local seafood	52.7%
An abundant coastline and water-based activities	40.0%
Museums and historical sites	28.4%
Opportunities to relax and recharge	28.2%
Scenic drives	26.8%
Varied landscapes and natural beauty	25.4%
Distinctive towns and neighborhoods	24.7%
Opportunities to bond with my family	24.0%
Unique cultural history and heritage	21.6%
A variety of outdoor activities	21.2%
A diverse culinary scene featuring local favorites	20.4%
An ideal destination for a holiday weekend	20.2%
Safety	18.3%
A stop between two destinations	16.2%
Local breweries/distilleries/wineries	14.0%
Cultural events	13.8%
Deals and discounts for hotels and attractions	13.5%
A wealth of arts institutions and cultural events	13.1%
A destination where it is easy to extend my trip	12.3%
Access to professional sports	12.3%
Fun theme parks and family-friendly activities	10.8%
Music festivals	8.1%
A destination that is easy to add on to a business trip	7.1%
One-of-a-kind shopping experiences	5.9%
Other	5.4%

Question: Which of the following attributes of Maryland most motivate you to take an overnight leisure trip in the state? (Select all that apply) Base: All respondents. 1,605 responses.

Associations with Maryland vs. Importance to Destination Selection Process
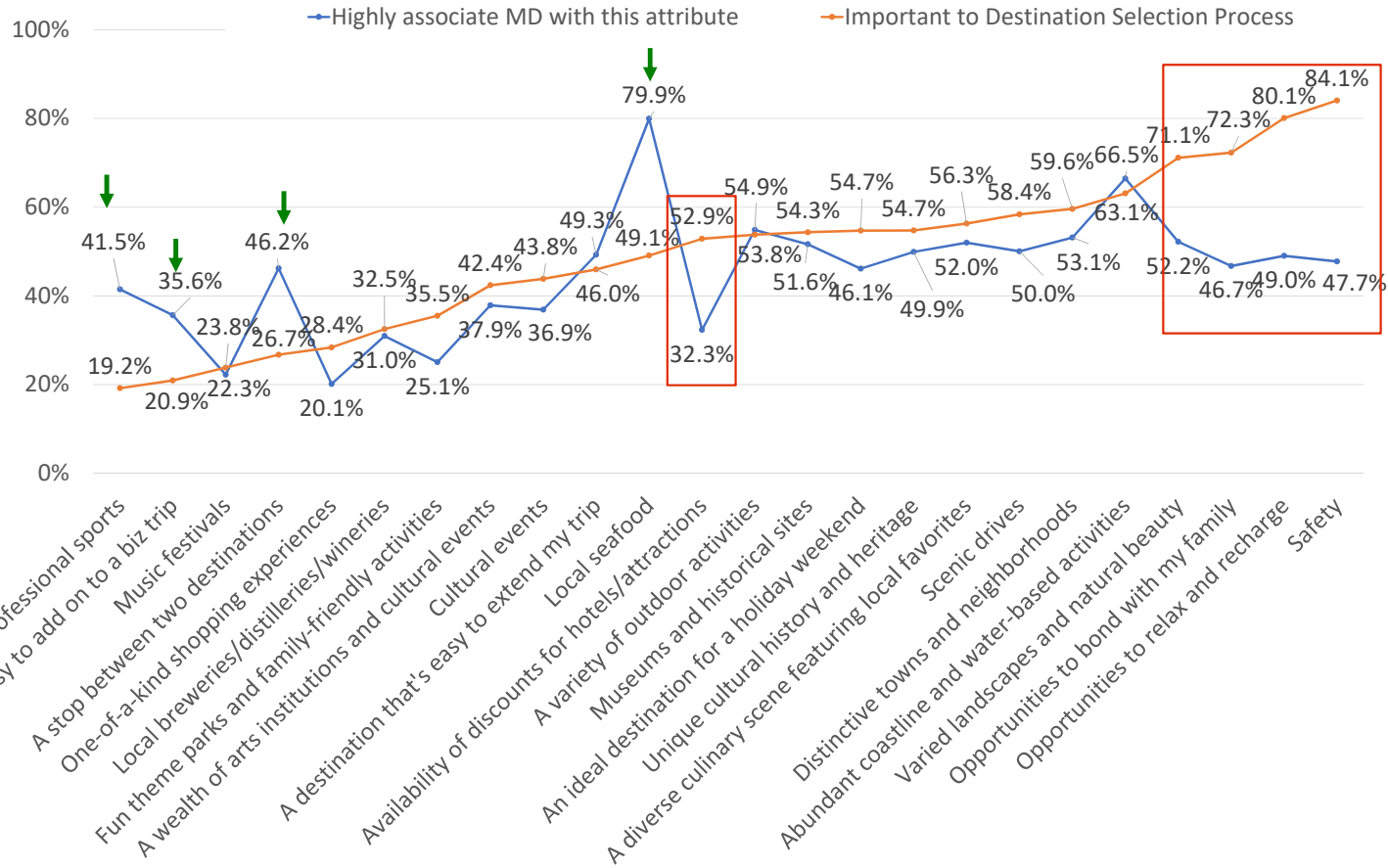
Questions: 1. Please think about your process for selecting destinations to visit for your overnight leisure trips. How important are each of the following attributes and offerings to you? 2. Please rate Maryland for each of the following attributes using the five-point scale below, in which "1" represents "Do not associate at all with Maryland" and "5" represents "Strongly associate with Maryland." Base: All respondents. 1,605 responses.

Inspiring Travel to Maryland

Figure 21: Inspiring Travel to Maryland—% of Respondents who ranked each statement #1 in Terms of Inspiring Visitation to the State

Statement	%
Seafood is the star of Maryland's culinary scene, with steaming crabs, fresh trout, local oysters, rockfish and more.	40.2%
From mountains to cities to the coast, you'll find it easy to get around and experience our vast, breathtaking geography by land or water.	22.8%
If you're looking for a water experience, the Chesapeake Bay is one of the Maryland's most treasured natural wonders.	18.7%
In Maryland, we pride ourselves on inclusivity and are open for any and all people who wish to visit here.	9.2%
Our sense of pride, authenticity and community is not just for locals—it's extended to all who visit Maryland.	9.0%

Question: Please rank the following statements based on how much they inspire you to take a leisure trip to Maryland. Please select and rank the top three statements from most inspirational (1) to least inspirational (3) by dragging a statement to the appropriate number on the right. Base: All respondents. 1,605 responses.

Deterrents to Visiting Maryland

Deterrent	Percentage
Other destinations are more appealing	54.5%
I don't know enough about Maryland	25.9%
I'm not interested in what Maryland offers as a travel experience	14.5%
Not enough personal vacation time	14.3%
Maryland is not exciting	12.8%
Maryland is too far from home	8.1%
Personal financial reasons	7.8%
There is not enough to do in Maryland	7.5%
I recently visited Maryland	7.1%
Maryland is not safe	5.1%
A trip to Maryland is too expensive	4.2%
Maryland is too difficult to get to	2.4%
Other	5.1%

Question: In a previous question, you responded that you were unlikely to visit Maryland in the next year. Which best describes the reason(s)? (Select all that apply) Base: Respondents who said they are unlikely to visit Maryland in the upcoming year. 373 responses.

The Ideal Maryland Trip

Method of Arrival / Length of Stay in Maryland

Figure 23: Method of Arrival

Method	Percentage
Personal auto	76.3%
Rental car	8.9%
Airplane	7.5%
Train	3.5%
Bus	1.2%
Motorcycle	0.5%
Bicycle	0.2%
Other	1.9%
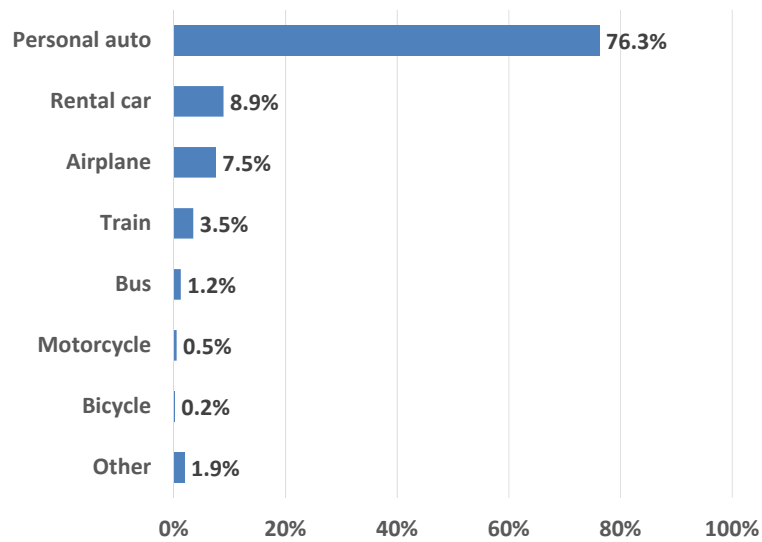
Question: If you were to take a leisure trip in Maryland, how would you most likely arrive?
Base: All respondents. 1,605 responses.

Figure 24: Length of Stay in Maryland

Days	3.7
Nights	3.0
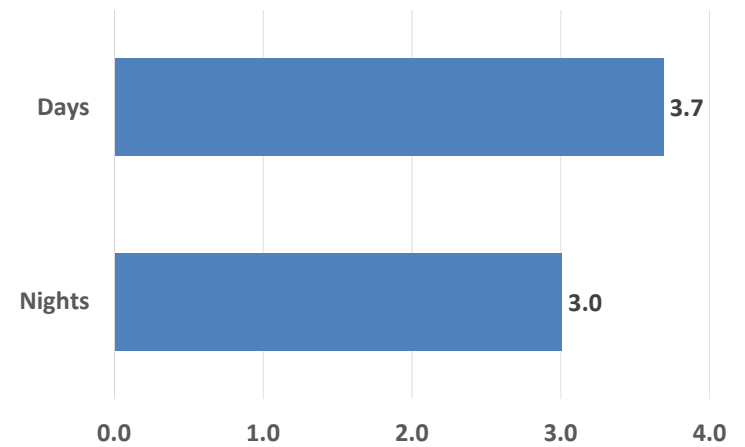
Question: If you were to take a leisure trip in Maryland, how long would you stay?
Base: All respondents. 1,605 responses.

Place of Stay / Travel Party Composition

Figure 25: Place of Stay

Place of Stay	Percentage
Hotel	81.0%
Motel	14.2%
Resort	11.1%
Airbnb or similar peer-to-peer lodging	10.1%
Bed-and-breakfast	9.0%
Private residence of friend or family member	8.7%
Vacation home rental	8.1%
Cabin, lodge or cottage	6.4%
Campground	2.8%
Sailing vacations (bareboat or captained charters)	0.5%
Other	1.9%
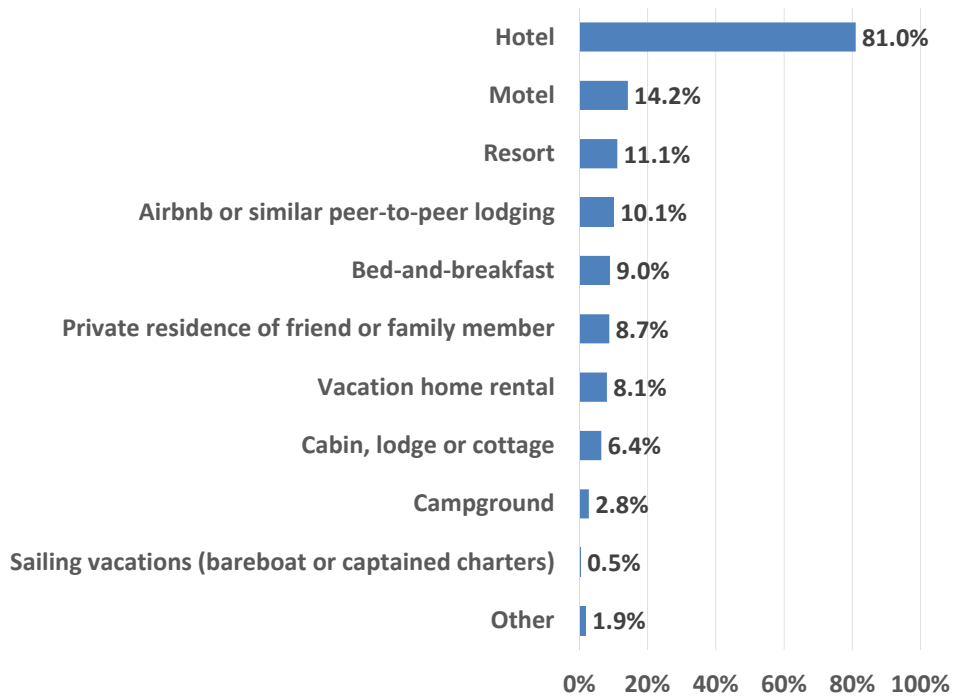
Question: If you were to take a leisure trip in Maryland, in which type of accommodations would you most likely stay? (Select all that apply) Base: All respondents. 1,605 responses.

Figure 26: Travel Party Composition

Travel Party	Percentage
Spouse or significant other	76.4%
Friend(s)	18.7%
Adult children	14.4%
Children under age 18 (my own)	13.4%
Children under age 18 (others)	10.0%
Other family members	8.5%
Parents	5.3%
No one (on my own)	5.3%
Grandparents	0.7%
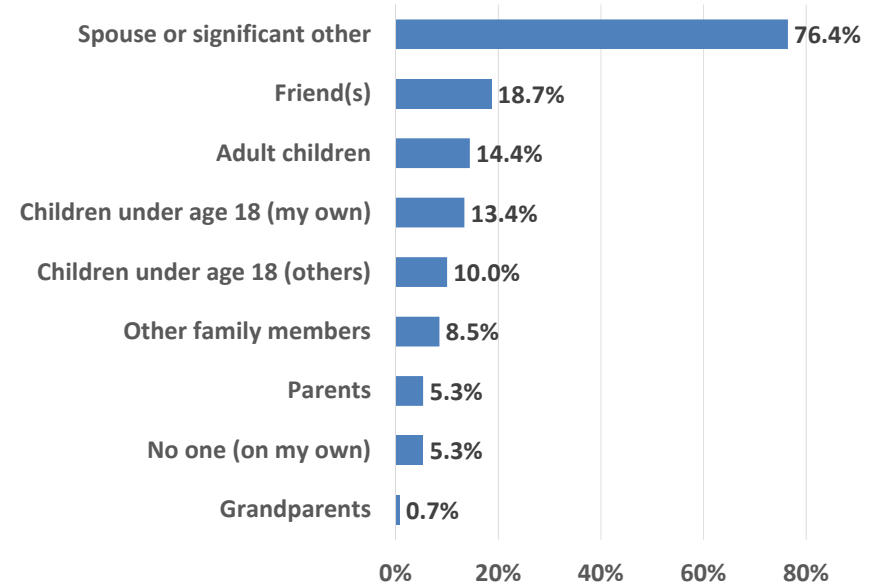
Question: If you were to take a leisure trip in Maryland, who would most likely travel with you? (Select all that apply) Base: All respondents. 1,605 responses.

Maryland Activities

Figure 27: Maryland Activities

Activity	Percentage
Enjoying local seafood	58.4%
Visiting the beach	53.6%
Visiting historical sites	46.1%
Enjoying the local culinary scene	42.8%
Going sightseeing	42.8%
Scenic drives	38.0%
Shopping	33.7%
Arts/cultural activities – museums, theater, etc	29.1%
Enjoying breweries/distilleries/wineries	25.0%
Swimming	22.9%
Hiking	16.3%
Watching professional and/or minor league sports	14.2%
Biking	10.4%
Getting a feel for the local personalities	10.2%
Fishing	8.9%
Golf	6.5%
Sailing	5.0%
Motorboating	3.3%
Jet skiing	3.1%
Tennis	2.5%
Other	4.5%
Unsure/I don't know	4.7%

Question: If you were to take a leisure trip in Maryland, which of the following would you participate in during your trip? (Select all that apply) Base: All respondents. 1,605 responses.

RESPONDENT DEMOGRAPHICS

Demographics

	Total	Likely to Visit Maryland Next Year	Unlikely to visit Maryland Next Year	Past Visitor	Non-Visitor
Mean Age	**55.0**	**53.1**	**56.3**	**54.1**	**55.6**
Female	53.3%	56.1%	51.4%	55.6%	51.8%
Male	46.3%	43.7%	48.0%	44.2%	47.6%
Other	0.4%	0.1%	0.5%	0.1%	0.5%
Mean Household Income	**$110,255**	**$111,614**	**$109,351**	**$111,395**	**$109,541**
Postgraduate work/degree	34.4%	35.1%	33.9%	36.5%	33.0%
College graduate	42.6%	43.1%	42.2%	40.5%	43.9%
Some college	12.9%	11.9%	13.5%	13.1%	12.7%
Trade / technical / vocational training	3.4%	3.8%	3.2%	3.3%	3.5%
High school graduate	6.7%	5.9%	7.2%	6.5%	6.9%
Some high school	0.1%	0.1%	0.0%	0.1%	0.0%
Base	1605	721	884	682	923

Age

Gender

Household Income

Formal Education

Demographics—Continued

		Total	Likely to Visit Maryland Next Year	Unlikely to visit Maryland Next Year	Past Visitor	Non-Visitor
Marital Status	Single	23.2%	26.0%	21.3%	23.7%	22.9%
	Married	71.0%	69.7%	71.8%	71.2%	70.9%
	Domestic partnership	4.7%	2.7%	6.0%	3.7%	5.3%
Children	Has children under 18 living in household	23.5%	29.7%	19.3%	27.5%	21.0%
Orientation	Heterosexual	92.4%	92.0%	92.6%	91.1%	93.2%
	Gay/lesbian/bisexual (LGBTQ)	5.2%	5.2%	5.1%	5.0%	5.3%
	Other	0.5%	0.7%	0.4%	1.0%	0.2%
Ethnicity	Caucasian/white	79.7%	71.0%	85.5%	74.4%	83.0%
	African-American/black	8.5%	12.7%	5.6%	10.5%	7.2%
	Asian	7.3%	10.8%	5.0%	10.3%	5.4%
	Hispanic/Latin American	3.6%	4.1%	3.3%	3.5%	3.7%
	Native American	0.2%	0.2%	0.2%	0.2%	0.2%
	Other	0.3%	0.5%	0.2%	0.4%	0.3%
	Base	1605	721	884	682	923

Summary of the Typical Traveler in Key Markets

TOTAL AGGREGATE

Familiarity, Past Visitation & Likelihood to Visit Maryland
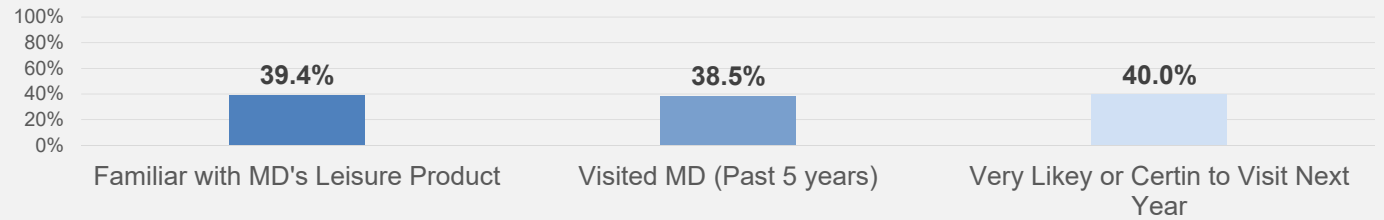
- **39.4%** Familiar with MD's Leisure Product
- **38.5%** Visited MD (Past 5 years)
- **40.0%** Very Likey or Certin to Visit Next Year

Top Resources for Destination Inspiration

- **59.7%** Friends/family (direct contact)
- **49.2%** Online searches
- **36.6%** Travel-planning website
- **29.0%** Official destination websites
- **28.1%** Print magazine/ newspaper article

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- **52.7%** Local seafood
- **40.0%** Coastline, beaches, and water activities
- **28.4%** Museums and historical sites
- **28.2%** Opportunities to relax

Maryland Ad Recall (Past 6 Months)

- ■ Yes ■ No
- **13.9%** Yes
- **86.1%** No

Top Activities for Ideal MD Trip

- Enjoying local seafood — **58.4%**
- Visiting the beach — **53.6%**
- Visiting historical sites — **46.1%**
- Going sightseeing — **42.8%**
- Enjoy local culinary scene — **42.8%**

Overnight Leisure Trips Taken/Anticipated

- **4.1** Taken In The Past Year
- **4.0** Anticipated Trips (OUTSIDE primary state of residence) in the Next Year

Destination Analysts
DO YOUR RESEARCH
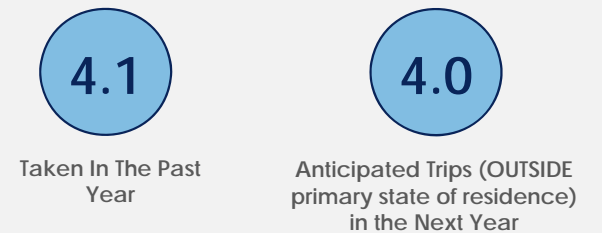
SEGMENT SUMMARIES BY MARKET OF STUDY

ALBANY (CONTROL MARKET)

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: 20.8% / 39.4%
- Visited MD (Past 5 years): 19.8% / 38.5%
- Very Likely or Certain to Visit Next Year: 25.7% / 40.0%

Top Resources for Destination Inspiration

- Friends/family (direct contact): 52.5% / 59.7%
- Online searches: 49.5% / 49.2%
- Official destination websites: 27.7% / 29.0%
- Print magazine/ newspaper article: 27.7% / 28.1%
- Broadcast television programs: 26.7% / 18.7%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: 44.6% / 52.7%
- Coastline, beaches, and water activities: 41.6% / 40.0%
- Scenic drives: 30.7% / 26.8%
- Varied landscapes and natural beauty: 28.7% / 25.4%

Maryland Ad Recall (Past 6 Months)

- Yes: 7.9% / 13.9%
- No: 92.1% / 86.1%

Top Activities for Ideal MD Trip

- Visiting the beach: 57.4% / 53.6%
- Visiting historical sites: 51.5% / 46.1%
- Enjoying local seafood: 51.5% / 58.4%
- Going sightseeing: 47.5% / 42.8%
- Enjoy local culinary scene: 41.6% / 42.8%

Overnight Leisure Trips Taken/Anticipated

- Taken In The Past Year: 4.7 / 4.1
- Anticipated Trips (OUTSIDE primary state of residence) in the Next Year: 3.4 / 4.0

Destination Analysts
DO YOUR RESEARCH

BALTIMORE

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: 95.0% / 39.4%
- Visited MD (Past 5 years): 77.2% / 38.5%
- Very Likely or Certain to Visit Next Year: 86.1% / 40.0%

Top Resources for Destination Inspiration

- Friends/family (direct contact): 56.4% / 59.7%
- Online searches: 41.6% / 49.2%
- Travel-planning websites: 40.6% / 36.6%
- Official destination websites: 33.7% / 29.0%
- Broadcast television programs: 25.7% / 18.7%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: 58.4% / 52.7%
- Coastline, beaches, and water activities: 49.5% / 40.0%
- Scenic drives: 40.6% / 26.8%
- A variety of outdoor activities: 38.6% / 21.2%

Maryland Ad Recall (Past 6 Months)

- Yes: 30.7% / 13.9%
- No: 69.3% / 86.1%

Top Activities for Ideal MD Trip

- Visiting the beach: 62.4% / 53.6%
- Enjoying local seafood: 62.4% / 58.4%
- Visiting historical sites: 49.5% / 46.1%
- Enjoy local culinary scene: 43.6% / 42.8%
- Scenic drives: 40.6% / 38.0%

Overnight Leisure Trips Taken/Anticipated

- Taken In The Past Year: 3.9 / 4.1
- Anticipated Trips (OUTSIDE primary state of residence) in the Next Year: 3.3 / 4.0

Destination Analysts
DO YOUR RESEARCH

CINCINNATI

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: **13.0%** / 39.4%
- Visited MD (Past 5 years): **22.0%** / 38.5%
- Very Likely or Certain to Visit Next Year: **16.0%** / 40.0%

Top Resources for Destination Inspiration

- Friends/family (direct contact): **69.0%** / 59.7%
- Online searches: **60.0%** / 49.2%
- Travel-planning websites: **38.0%** / 36.6%
- Official destination websites: **31.0%** / 29.0%
- Posts from people I follow on social media: **22.0%** / 13.7%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: **48.0%** / 52.7%
- Coastline, beaches, and water activities: **42.0%** / 40.0%
- Scenic drives: **32.0%** / 26.8%
- Varied landscapes and natural beauty: **29.0%** / 25.4%

Maryland Ad Recall (Past 6 Months)

- Yes: **5.0%** / 13.9%
- No: **95.0%** / 86.1%

Top Activities for Ideal MD Trip

- Enjoying local seafood: **64.0%** / 58.4%
- Visiting historical sites: **58.0%** / 46.1%
- Going sightseeing: **55.0%** / 42.8%
- Visiting the beach: **53.0%** / 53.6%
- Scenic drives: **52.0%** / 38.0%

Overnight Leisure Trips Taken/Anticipated

- **4.1** / 4.1 — Taken In The Past Year
- **3.4** / 4.0 — Anticipated Trips (OUTSIDE primary state of residence) in the Next Year

Destination Analysts
DO YOUR RESEARCH

CLEVELAND

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: **16.0%** — 39.4%
- Visited MD (Past 5 years): **19.0%** — 38.5%
- Very Likely or Certain to Visit Next Year: **16.0%** — 40.0%

Top Resources for Destination Inspiration

- Friends/family (direct contact): **64.0%** — 59.7%
- Online searches: **49.0%** — 49.2%
- Official destination websites: **40.0%** — 29.0%
- Print magazine/ newspaper article: **34.0%** — 28.1%
- Travel-planning Websites: **32.0%** — 36.6%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: **45.0%** — 52.7%
- Museums and historical sites: **39.0%** — 28.4%
- Coastline, beaches, and water activities: **36.0%** — 40.0%
- Scenic drives: **35.0%** — 26.8%

Maryland Ad Recall (Past 6 Months)

- Yes: **2.0%** — 13.9%
- No: **98.0%** — 86.1%

Top Activities for Ideal MD Trip

- Visiting historical sites: **61.0%** — 46.1%
- Enjoying local seafood: **57.0%** — 58.4%
- Visiting the beach: **56.0%** — 53.6%
- Going sightseeing: **52.0%** — 42.8%
- Enjoy local culinary scene: **49.0%** — 42.8%

Overnight Leisure Trips Taken/Anticipated

- **3.4** — 4.1 — Taken In The Past Year
- **2.9** — 4.0 — Anticipated Trips (OUTSIDE primary state of residence) in the Next Year

Destination Analysts
DO YOUR RESEARCH

COLUMBUS

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: 19.0% / 39.4%
- Visited MD (Past 5 years): 20.0% / 38.5%
- Very Likely or Certain to Visit Next Year: 19.0% / 40.0%

Top Resources for Destination Inspiration

- Friends/family (direct contact): 63.0% / 59.7%
- Online searches: 52.0% / 49.2%
- Travel-planning websites: 34.0% / 36.6%
- Official destination websites: 26.0% / 29.0%
- Online magazine/newspaper article: 23.0% / 20.1%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: 48.0% / 52.7%
- Unique cultural history: 37.0% / 21.6%
- Coastline, beaches, and water activities: 32.0% / 40.0%
- Museums and historical sites: 30.0% / 28.4%

Maryland Ad Recall (Past 6 Months)

- Yes: 4.0% / 13.9%
- No: 96.0% / 86.1%

Top Activities for Ideal MD Trip

- Visiting historical sites: 55.0% / 46.1%
- Enjoying local seafood: 52.0% / 58.4%
- Going sightseeing: 49.0% / 42.8%
- Scenic drives: 46.0% / 38.0%
- Visiting the beach: 45.0% / 53.6%

Overnight Leisure Trips Taken/Anticipated

- 4.1 / 4.1 — Taken In The Past Year
- 3.2 / 4.0 — Anticipated Trips (OUTSIDE primary state of residence) in the Next Year

Destination Analysts
DO YOUR RESEARCH

DISTRICT OF COLUMBIA

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: **87.0%** / 39.4%
- Visited MD (Past 5 years): **71.6%** / 38.5%
- Very Likely or Certain to Visit Next Year: **81.9%** / 40.0%

Top Resources for Destination Inspiration

- Friends/family (direct contact): **63.5%** / 59.7%
- Online searches: **47.5%** / 49.2%
- Travel-planning websites: **30.4%** / 36.6%
- Official destination websites: **28.8%** / 29.0%
- Print magazine/newspaper article: **28.8%** / 28.1%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: **60.2%** / 52.7%
- Coastline, beaches, and water activities: **43.5%** / 40.0%
- Opportunities to relax and recharge: **35.1%** / 28.2%
- Museums and historical sites: **34.8%** / 28.4%

Maryland Ad Recall (Past 6 Months)

- Yes: 31.1% / 13.9%
- No: 68.9% / 86.1%

Top Activities for Ideal MD Trip

- Enjoy local seafood: 59.2% / 58.4%
- Visiting the beach: 55.2% / 53.6%
- Enjoy local culinary scene: 43.8% / 42.8%
- Visiting historical sites: 42.8% / 46.1%
- Going sightseeing: 42.5% / 42.8%

Overnight Leisure Trips Taken/Anticipated

- **4.6** / 4.1 — Taken In The Past Year
- **4.1** / 4.0 — Anticipated Trips (OUTSIDE primary state of residence) in the Next Year

Destination Analysts
DO YOUR RESEARCH

HARRISBURG/ LANCASTER

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: **59.0%** / 39.4%
- Visited MD (Past 5 years): **64.0%** / 38.5%
- Very Likely or Certain to Visit Next Year: **72.0%** / 40.0%

Top Resources for Destination Inspiration

- Friends/family (direct contact): **64.0%** / 59.7%
- Online searches: **53.0%** / 49.2%
- Travel-planning websites: **46.0%** / 36.6%
- Official destination websites: **32.0%** / 29.0%
- Print magazine/ newspaper article: **28.0%** / 28.1%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: **63.0%** / 52.7%
- Coastline, beaches, and water activities: **52.0%** / 40.0%
- Opportunities to relax and recharge: **39.0%** / 28.2%
- Scenic drives: **30.0%** / 26.8%

Maryland Ad Recall (Past 6 Months)

- Yes: **25.0%** / 13.9%
- No: **75.0%** / 86.1%

Top Activities for Ideal MD Trip

- Enjoy local seafood: **65.0%** / 58.4%
- Visiting the beach: **60.0%** / 53.6%
- Visiting historical sites: **42.0%** / 46.1%
- Scenic drives: **42.0%** / 38.0%
- Enjoy local culinary scene: **41.0%** / 42.8%

Overnight Leisure Trips Taken/Anticipated

- **4.5** / 4.1 — Taken In The Past Year
- **3.5** / 4.0 — Anticipated Trips (OUTSIDE primary state of residence) in the Next Year

Destination Analysts
DO YOUR RESEARCH

NEW YORK

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: 24.7% / 39.4%
- Visited MD (Past 5 years): 27.1% / 38.5%
- Very Likely or Certain to Visit Next Year: 26.4% / 40.0%

Top Resources for Destination Inspiration

- Friends/family (direct contact): 55.2% / 59.7%
- Online searches: 44.8% / 49.2%
- Travel planning websites: 37.5% / 36.6%
- Print magazine/newspaper article: 31.4% / 28.1%
- Official destination websites: 25.4% / 29.0%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: 49.8% / 52.7%
- Coastline, beaches, and water activities: 32.4% / 40.0%
- Museums and historical sites: 25.8% / 28.4%
- Opportunities to relax and recharge: 21.1% / 28.2%

Maryland Ad Recall (Past 6 Months)

- Yes: 6.4% / 13.9%
- No: 93.6% / 86.1%

Top Activities for Ideal MD Trip

- Enjoy local seafood: 56.9% / 58.4%
- Visiting the beach: 47.8% / 53.6%
- Visiting historical sites: 42.5% / 46.1%
- Enjoy local culinary scene: 39.1% / 42.8%
- Going sightseeing: 37.5% / 42.8%

Overnight Leisure Trips Taken/Anticipated

- Taken In The Past Year: 3.9 / 4.1
- Anticipated Trips (OUTSIDE primary state of residence) in the Next Year: 3.4 / 4.0

Destination Analysts
DO YOUR RESEARCH

PHILADELPHIA

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: **38.7%** / 39.4%
- Visited MD (Past 5 years): **43.3%** / 38.5%
- Very Likely or Certain to Visit Next Year: **39.7%** / 40.0%

Top Resources for Destination Inspiration

- Friends/family (direct contact): **64.0%** / 59.7%
- Online searches: **56.3%** / 49.2%
- Travel-planning websites: **38.7%** / 36.6%
- Official destination websites: **30.0%** / 29.0%
- Online travel agencies: **26.7%** / 22.7%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: **56.7%** / 52.7%
- Coastline, beaches, and water activities: **51.0%** / 40.0%
- Opportunities to relax and recharge: **32.7%** / 28.2%
- Opportunities for family time: **30.0%** / 24.0%

Maryland Ad Recall (Past 6 Months)

- Yes: **19.0%** / 13.9%
- No: **81.0%** / 86.1%

Top Activities for Ideal MD Trip

- Enjoy local seafood: **61.0%** / 58.4%
- Visiting the beach: **55.3%** / 53.6%
- Enjoy local culinary scene: **45.7%** / 42.8%
- Going sightseeing: **45.3%** / 42.8%
- Visiting historical sites: **43.3%** / 46.1%

Overnight Leisure Trips Taken/Anticipated

- **4.1** / 4.1 — Taken In The Past Year
- **3.6** / 4.0 — Anticipated Trips (OUTSIDE primary state of residence) in the Next Year

Destination Analysts
DO YOUR RESEARCH

Pittsburgh

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: 36.2% / 39.4%
- Visited MD (Past 5 years): 32.4% / 38.5%
- Very Likely or Certain to Visit Next Year: 40.0% / 40.0%

Top Resources for Destination Inspiration

- Friends/family (direct contact): 58.1% / 59.7%
- Online searches: 57.1% / 49.2%
- Travel-planning websites: 41.0% / 36.6%
- Official destination websites: 31.4% / 29.0%
- Print magazine/ newspaper article: 22.9% / 20.1%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: 52.4% / 52.7%
- Coastline, beaches, and water activities: 45.7% / 42.8%
- Opportunities to relax and recharge: 39.0% / 28.2%
- Opportunities for family time: 35.2% / 24.0%

Maryland Ad Recall (Past 6 Months)

- Yes: 19.0% / 13.9%
- No: 81.0% / 86.1%

Top Activities for Ideal MD Trip

- Visiting the beach: 72.4% / 53.6%
- Enjoy local seafood: 57.1% / 58.4%
- Going sightseeing: 52.4% / 42.8%
- Enjoy local culinary scene: 45.7% / 42.8%
- Visiting historical sites: 44.8% / 46.1%

Overnight Leisure Trips Taken/Anticipated

- 4.6 / 4.1 — Taken In The Past Year
- 4.0 / 4.0 — Anticipated Trips (OUTSIDE primary state of residence) in the Next Year

Destination Analysts
DO YOUR RESEARCH

Segment Summaries by Likelihood to Visit Maryland Next Year for Leisure

Likelihood to Visit Maryland Next Year by Market

Top-Two Box Score (% who said they are "Certain" or "Very likely" to visit Maryland in the upcoming year)
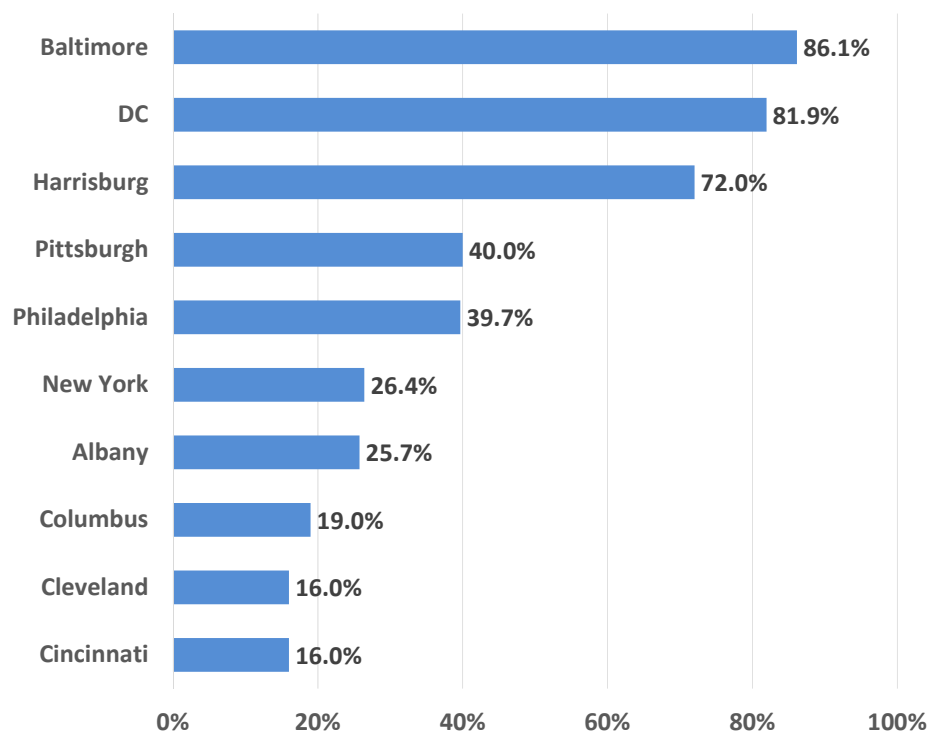
Market	Percentage
Baltimore	86.1%
DC	81.9%
Harrisburg	72.0%
Pittsburgh	40.0%
Philadelphia	39.7%
New York	26.4%
Albany	25.7%
Columbus	19.0%
Cleveland	16.0%
Cincinnati	16.0%

Question: On a five-point scale, where "1" represents "Definitely will NOT visit" and "5" represents "Definitely WILL visit," what is the likelihood that you will visit each of the following in the next year? Base: All respondents. 1,605 responses.

LIKELY TO VISIT MARYLAND

(Data shown here is reflective of travelers who said they are very likely or certain to visit Maryland in the next year)

Top Markets of Study Likely to Visit MD Next Year (Outside Baltimore)

- **District of Columbia** (81.9%) **40.0%**
- **Harrisburg** (72.0%)
- **Pittsburgh** (40.0%)

(% rating their likelihood to visit MD as a 4 or 5 on 5-point scale)
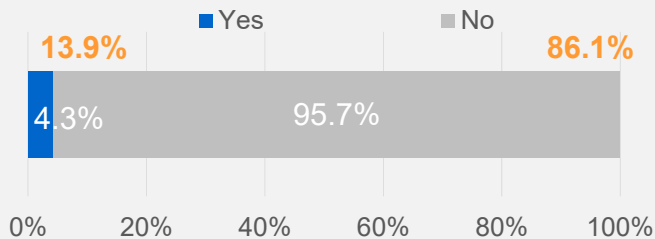
Familiarity & Past Visitation to Maryland
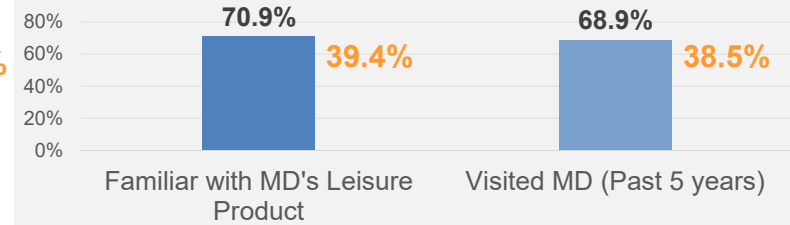
- Familiar with MD's Leisure Product: **70.9%** / 39.4%
- Visited MD (Past 5 years): **68.9%** / 38.5%

Top Resources for Destination Inspiration

- Friends/family (direct contact): **61.0%** / 59.7%
- Online searches: **50.8%** / 49.2%
- Travel-planning websites: **40.9%** / 36.6%
- Official destination websites: **32.7%** / 29.0%
- Print magazine/newspaper article: **30.3%** / 20.1%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: **58.1%** / 52.7%
- Coastline, beaches, and water activities: **46.4%** / 42.8%
- Opportunities to relax and recharge: **37.2%** / 28.2%
- Scenic drives: **34.7%** / 26.8%

Maryland Ad Recall (Past 6 Months)

- Yes: **28.1%** / 13.9%
- No: **71.9%** / 86.1%

Top Activities for Ideal MD Trip

- Enjoying local seafood: 62.6% / 58.4%
- Visiting the beach: 61.9% / 53.6%
- Visiting historical sites: 47.4% / 46.1%
- Enjoy local culinary scene: 45.8% / 42.8%
- Going sightseeing: 43.1% / 42.8%
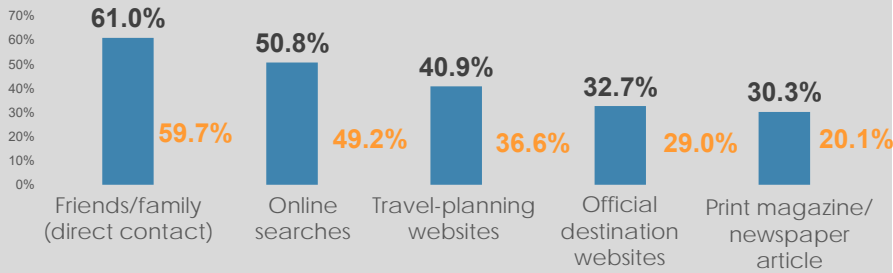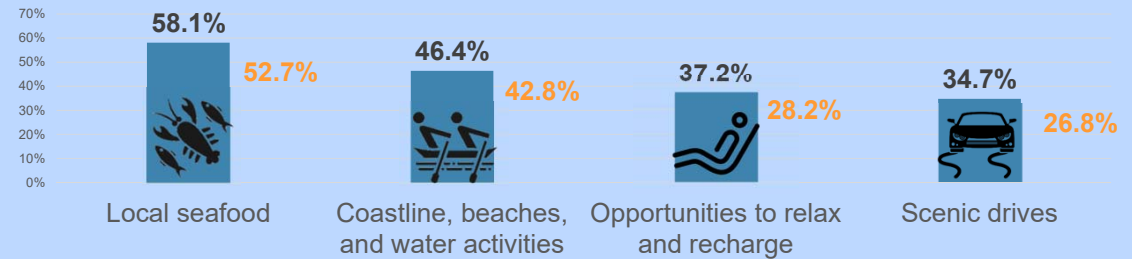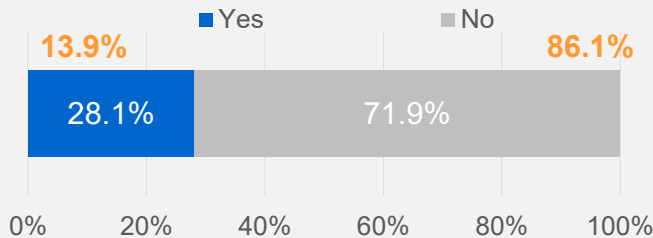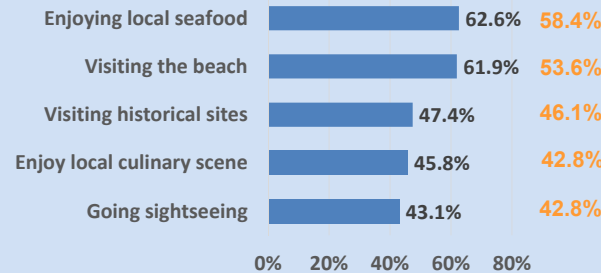
Reasons for High Likelihood of Visiting MD
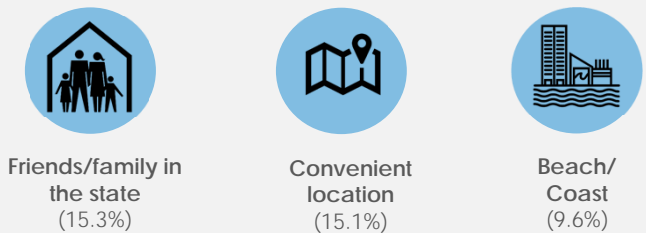
- Friends/family in the state (15.3%)
- Convenient location (15.1%)
- Beach/Coast (9.6%)

Destination Analysts
DO YOUR RESEARCH

UNLIKELY TO VISIT MARYLAND

(Data shown here is reflective of travelers who said they are unlikely or certain not to visit Maryland in the next year)

Top Markets of Study Least Likely to Visit MD Next Year

- **Cincinnati** (84.0%)
- **Cleveland** (84.0%)
- **Columbus** (81.0%)

25.1%
(% rating their likelihood to visit MD as a 3 or below on 5-point scale)

Familiarity & Past Visitation to Maryland
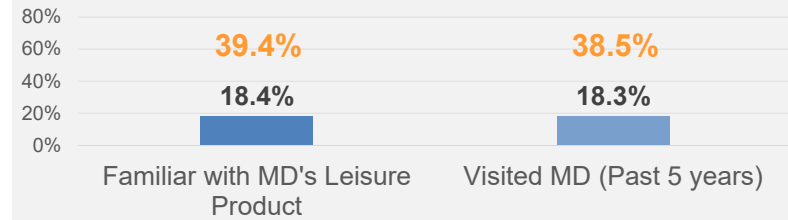
- Familiar with MD's Leisure Product: **39.4%** / 18.4%
- Visited MD (Past 5 years): **38.5%** / 18.3%

Top Resources for Destination Inspiration

- Friends/family (direct contact): **58.8%** / 59.7%
- Online searches: **48.2%** / 49.2%
- Travel-planning websites: **33.7%** / 36.6%
- Print magazine/ newspaper article: **26.7%** / 20.1%
- Official destination websites: **26.6%** / 29.0%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: **49.0%** / 52.7%
- Coastline, beaches, and water activities: **35.8%** / 42.8%
- Museums and historical sites: **26.2%** / 28.4%
- Opportunities to relax and recharge: **22.2%** / 28.2%

Maryland Ad Recall (Past 6 Months)

- Yes
- No

13.9% — 4.3%
86.1% — 95.7%

Top Activities for Ideal MD Trip

- Enjoying local seafood: 55.5% / **58.4%**
- Visiting the beach: 48.0% / **53.6%**
- Visiting historical sites: 45.2% / **46.1%**
- Going sightseeing: 42.5% / **42.8%**
- Enjoy local culinary scene: 40.7% / **42.8%**

Deterrents to Visiting

- Other destinations are more appealing (54.5%)
- Don't know enough about Maryland (25.9%)
- Not interested in what MD offers (14.5%)

SEGMENT SUMMARIES BY GENERATION

YOUNGER MILLENNIAL

(Travelers aged 25-31 years old)

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: 46.7% / 39.4%
- Visited MD (Past 5 years): 44.5% / 38.5%
- Very Likely or Certain to Visit Next Year: 51.2% / 40.0%
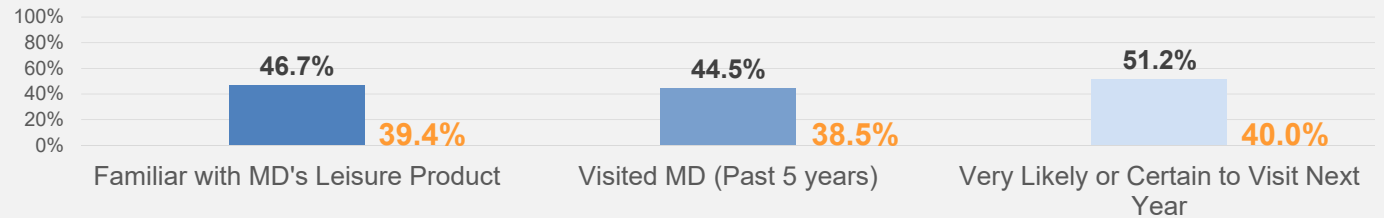
Top-of-Mind Associations with Maryland

Baltimore
Annapolis
Shopping
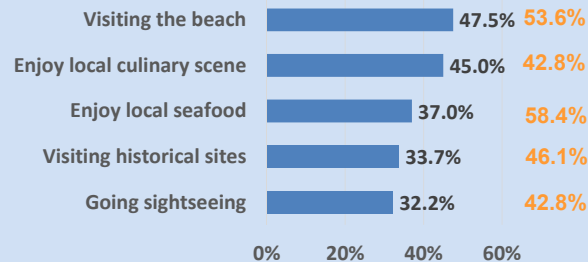Professional Sports
Chesapeake Bay
Restaurants/Food
Crabs
Ocean/Beach
Ocean City
District of Columbia
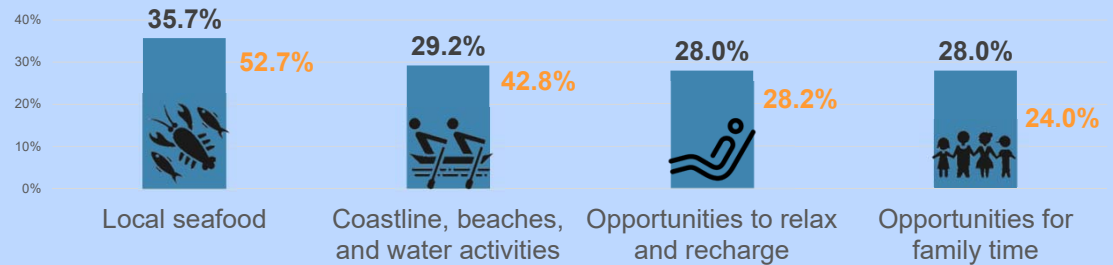
Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: 35.7% / 52.7%
- Coastline, beaches, and water activities: 29.2% / 42.8%
- Opportunities to relax and recharge: 28.0% / 28.2%
- Opportunities for family time: 28.0% / 24.0%

Maryland Ad Recall (Past 6 Months)

- Yes: 13.9% / 12.1%
- No: 86.1% / 87.9%

Top Activities for Ideal MD Trip

- Visiting the beach: 47.5% / 53.6%
- Enjoy local culinary scene: 45.0% / 42.8%
- Enjoy local seafood: 37.0% / 58.4%
- Visiting historical sites: 33.7% / 46.1%
- Going sightseeing: 32.2% / 42.8%

Deterrents to Visiting

- Other destinations are more appealing: 54.5% (69.3%)
- Don't know enough about Maryland: 25.9% (31.3%)
- Personal financial reasons: 7.8% (20.7%)

Destination Analysts
DO YOUR RESEARCH
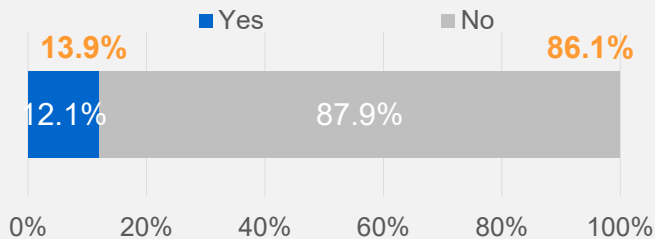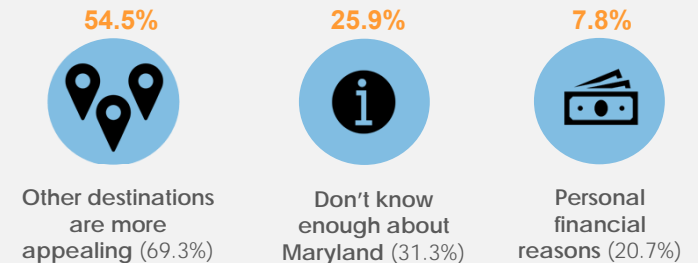
OLDER MILLENNIAL

(Travelers aged 32-39 years old)

Familiarity, Past Visitation & Likelihood to Visit Maryland

	Familiar with MD's Leisure Product	Visited MD (Past 5 years)	Very Likely or Certain to Visit Next Year
(black)	42.6%	40.3%	47.2%
(orange)	39.4%	38.5%	40.0%
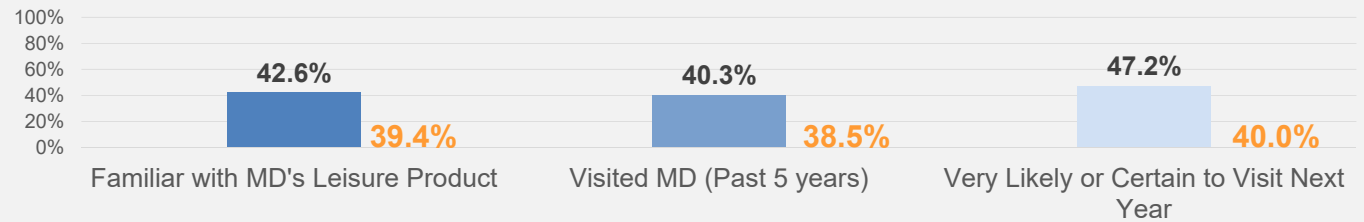
Top-of-Mind Associations with Maryland

Crabs

Restaurants/Food

Baltimore

Chesapeake Bay

Inner Harbor

Annapolis

Ocean/Beach

Ocean City

District of Columbia

Professional Sports

Most Motivational Attributes to Take Overnight Leisure Trip to MD

	Opportunities for family time	Local seafood	Coastline, beaches, and water activities	Museums and historical sites
(black)	36.2%	35.3%	33.2%	25.3%
(orange)	24.0%	52.7%	42.8%	28.4%

Maryland Ad Recall (Past 6 Months)

■ Yes   ■ No

13.9%   86.1%

14.8%   85.2%

Top Activities for Ideal MD Trip

Activity	(blue)	(orange)
Visiting the beach	55.8%	53.6%
Enjoy local seafood	43.2%	58.4%
Visiting historical sites	38.5%	46.1%
Going sightseeing	34.4%	42.8%
Shopping	33.0%	33.7%

Deterrents to Visiting

54.5%

Other destinations are more appealing (49.2%)

8.1%

Maryland is too far from home (22.7%)

14.3%

Not enough vacation time (21.6%)

Destination Analysts
DO YOUR RESEARCH
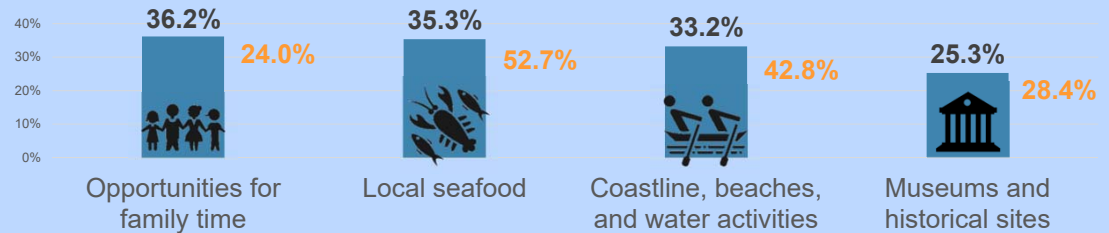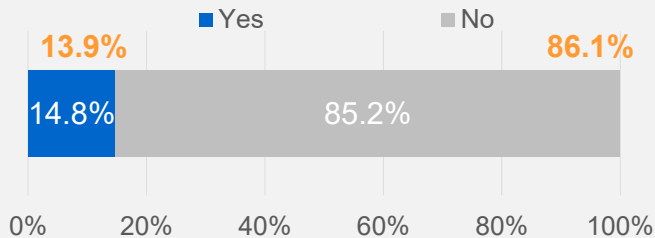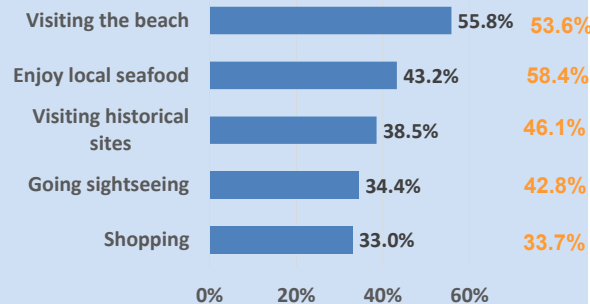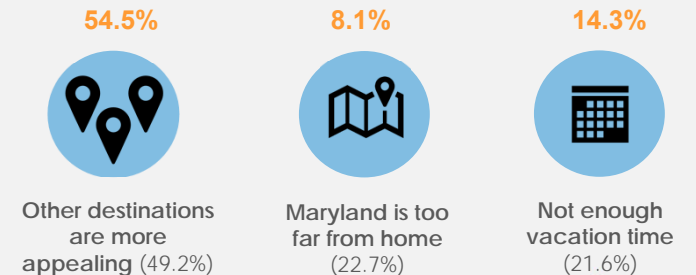
GEN X

(Travelers aged 40-50 years old)

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: **45.3%** / 39.4%
- Visited MD (Past 5 years): **41.8%** / 38.5%
- Very Likey or Certin to Visit Next Year: **47.2%** / 40.0%
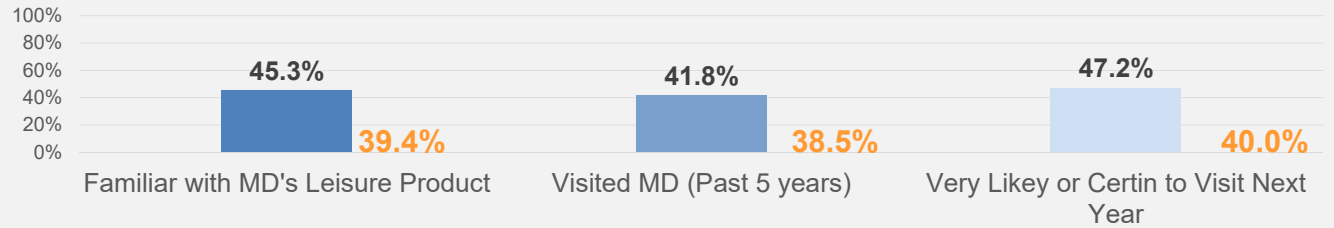
Top-of-Mind Associations with Maryland

Inner Harbor
Ocean/Beach Crabs
Baltimore Ocean City
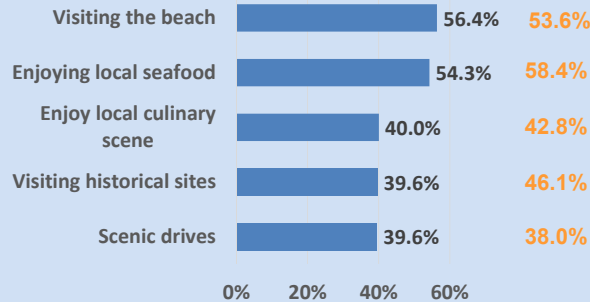History
Annapolis Restaurants/Food Chesapeake Bay

Most Motivational Attributes to Take Overnight Leisure Trip to MD
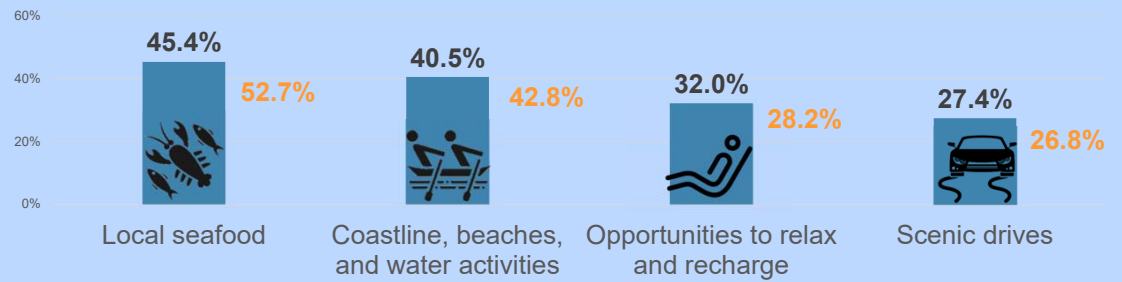
- Local seafood: **45.4%** / 52.7%
- Coastline, beaches, and water activities: **40.5%** / 42.8%
- Opportunities to relax and recharge: **32.0%** / 28.2%
- Scenic drives: **27.4%** / 26.8%

Maryland Ad Recall (Past 6 Months)

- Yes: **14.4%** / 13.9%
- No: **85.6%** / 86.1%

Top Activities for Ideal MD Trip

- Visiting the beach: 56.4% / 53.6%
- Enjoying local seafood: 54.3% / 58.4%
- Enjoy local culinary scene: 40.0% / 42.8%
- Visiting historical sites: 39.6% / 46.1%
- Scenic drives: 39.6% / 38.0%

Deterrents to Visiting

- **54.5%** Other destinations are more appealing (55.5%)
- **25.9%** Don't know enough about Maryland (36.6%)
- **12.8%** Maryland is not exciting (21.8%)

Destination Analysts
DO YOUR RESEARCH
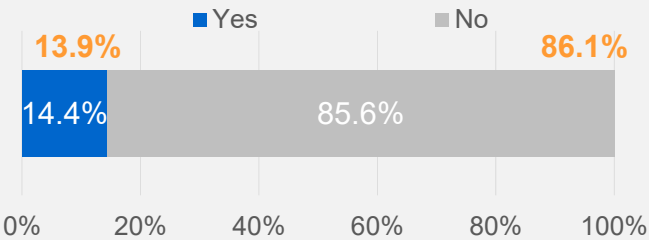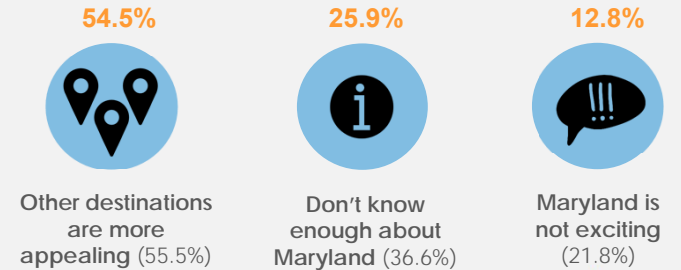
YOUNGER BOOMER

(Travelers aged 51-61 years old)

Familiarity, Past Visitation & Likelihood to Visit Maryland

	Familiar with MD's Leisure Product	Visited MD (Past 5 years)	Very Likely or Certain to Visit Next Year
(dark)	39.0%	38.1%	38.9%
(orange)	39.4%	38.5%	40.0%
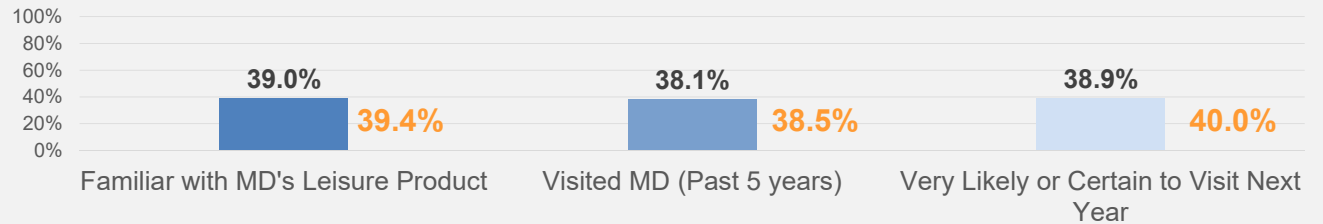
Top-of-Mind Associations with Maryland

Restaurants/Food Annapolis
Baltimore
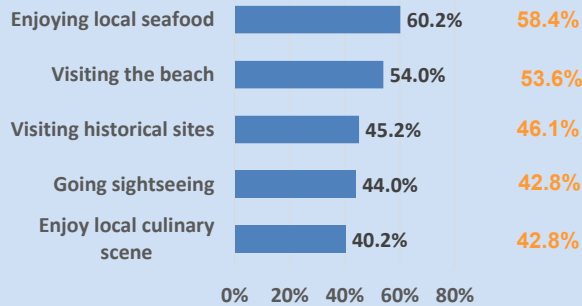Chesapeake Bay
Ocean City
Inner Harbor
Ocean/Beach History
Crabs

Most Motivational Attributes to Take Overnight Leisure Trip to MD

Local seafood	Coastline, beaches, and water activities	Museums and historical sites	Opportunities to relax and recharge
54.0%	35.6%	27.4%	25.7%
52.7%	42.8%	28.4%	28.2%

Maryland Ad Recall (Past 6 Months)

- Yes
- No

13.9% / 13.4% (Yes)
86.1% / 86.6% (No)

Top Activities for Ideal MD Trip

Activity		
Enjoying local seafood	60.2%	58.4%
Visiting the beach	54.0%	53.6%
Visiting historical sites	45.2%	46.1%
Going sightseeing	44.0%	42.8%
Enjoy local culinary scene	40.2%	42.8%

Deterrents to Visiting

54.5% — Other destinations are more appealing (47.1%)

25.9% — Don't know enough about Maryland (25.2%)

14.5% — Not interested in what MD offers (20.3%)

Destination Analysts
DO YOUR RESEARCH

OLDER BOOMER

(Travelers aged 62-71 years old)

Familiarity, Past Visitation & Likelihood to Visit Maryland

	Familiar with MD's Leisure Product	Visited MD (Past 5 years)	Very Likely or Certain to Visit Next Year
(dark)	33.1%	36.4%	33.5%
(orange)	39.4%	38.5%	40.0%

Top-of-Mind Associations with Maryland

Ocean City
Baltimore
Annapolis
Inner Harbor
History
Restaurants/Food
Ocean/Beach
Chesapeake Bay
Crabs

Most Motivational Attributes to Take Overnight Leisure Trip to MD
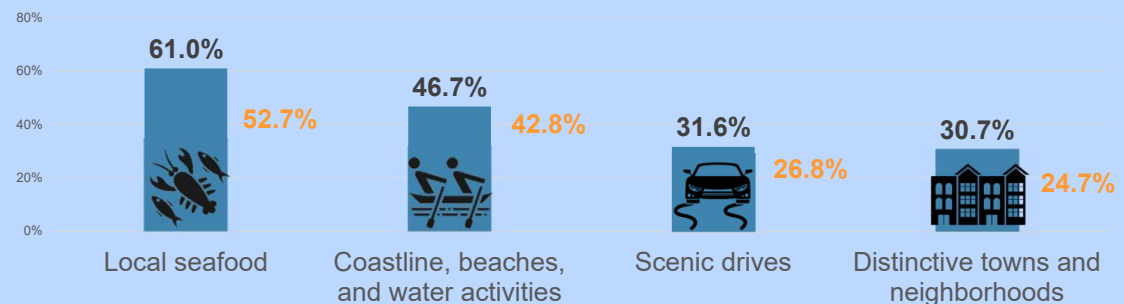
Local seafood	Coastline, beaches, and water activities	Scenic drives	Distinctive towns and neighborhoods
61.0%	46.7%	31.6%	30.7%
52.7%	42.8%	26.8%	24.7%

Maryland Ad Recall (Past 6 Months)

- Yes
- No

13.9%   86.1%

| 13.9% | 86.1% |

Top Activities for Ideal MD Trip

Activity		
Enjoying local seafood	66.3%	58.4%
Visiting the beach	54.0%	53.6%
Visiting historical sites	52.8%	46.1%
Going sightseeing	47.2%	42.8%
Enjoy local culinary scene	47.0%	42.8%

Deterrents to Visiting

54.5% — Other destinations are more appealing (61.8%)

25.9% — Don't know enough about Maryland (26.7%)

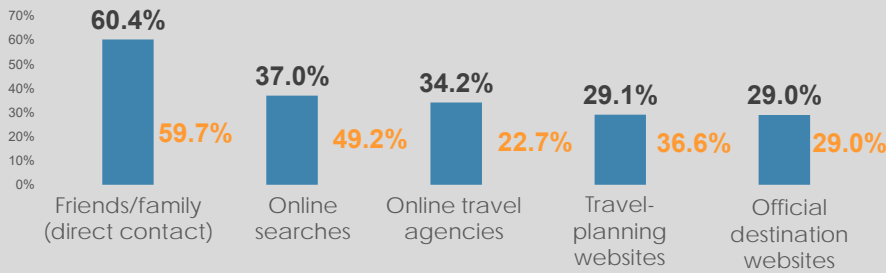12.8% — Maryland is not exciting (13.3%)

Destination Analysts
DO YOUR RESEARCH
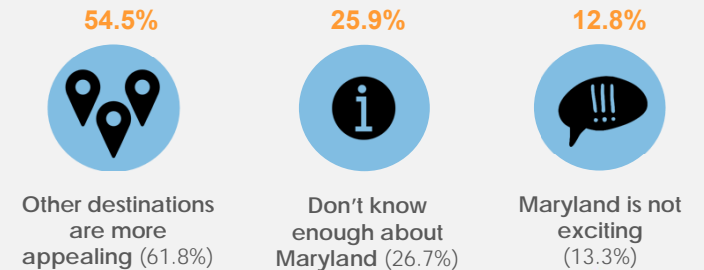
SUMMARY OF OTHER TRAVELER SEGMENTS

THE AFRICAN-AMERICAN TRAVELER

Familiarity, Past Visitation & Likelihood to Visit Maryland

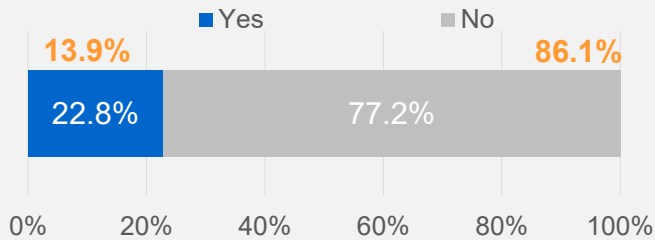- Familiar with MD's Leisure Product: **62.0%** / 39.4%
- Visited MD (Past 5 years): **47.9%** / 38.5%
- Very Likely or Certain to Visit Next Year: **60.3%** / 40.0%

Top Resources for Destination Inspiration

- Friends/family (direct contact): **60.4%** / 59.7%
- Online searches: **37.0%** / 49.2%
- Online travel agencies: **34.2%** / 22.7%
- Travel-planning websites: **29.1%** / 36.6%
- Official destination websites: **29.0%** / 29.0%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: **58.3%** / 52.7%
- Opportunities to relax and recharge: **34.7%** / 28.2%
- Coastline, beaches, and water activities: **34.5%** / 40.0%
- Museums and historical sites: **30.2%** / 28.4%

Maryland Ad Recall (Past 6 Months)

- Yes
- No
- 13.9%
- 86.1%
- Yes: **22.8%**
- No: **77.2%**

Top Activities for Ideal MD Trip

- Enjoy local seafood: **64.1%** / 58.4%
- Shopping: **52.9%** / 33.7%
- Visiting the beach: **50.8%** / 53.6%
- Enjoy local culinary scene: **46.4%** / 58.4%
- Visiting historical sites: **40.7%** / 46.1%

Overnight Leisure Trips Taken/Anticipated

- **4.2** / 4.1 — Taken In The Past Year
- **3.6** / 4.0 — Anticipated Trips (OUTSIDE primary state of residence) in the Next Year

Destination Analysts
DO YOUR RESEARCH

THE LGBTQ TRAVELER

Familiarity, Past Visitation & Likelihood to Visit Maryland

- Familiar with MD's Leisure Product: **35.7%** / 39.4%
- Visited MD (Past 5 years): **37.3%** / 38.5%
- Very Likely or Certain to Visit Next Year: **40.4%** / 40.0%

Top Resources for Destination Inspiration

- Online searches: **50.1%** / 49.2%
- Friends/family (direct contact): **49.4%** / 59.7%
- Travel-planning websites: **40.4%** / 36.6%
- Official destination websites: **37.3%** / 29.0%
- Print magazine/ Newspaper articles: **34.7%** / 20.1%

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- Local seafood: **45.3%** / 52.7%
- Museums and historical sites: **31.8%** / 28.4%
- Coastline, beaches, and water activities: **31.2%** / 40.0%
- Distinctive neighborhoods: **30.1%** / 24.7%

Maryland Ad Recall (Past 6 Months)

- Yes: **13.6%** / 13.9%
- No: **86.4%** / 86.1%

Top Activities for Ideal MD Trip

- Visiting historical sites: **52.2%** / 46.1%
- Enjoying local seafood: **52.1%** / 58.4%
- Enjoying the local culinary scene: **46.6%** / 58.4%
- Arts/cultural activities: **45.1%** / 29.1%
- Visiting the beach: **44.8%** / 53.6%

Overnight Leisure Trips Taken/Anticipated

- **4.3** / 4.1 — Taken In The Past Year
- **3.7** / 4.0 — Anticipated Trips (OUTSIDE primary state of residence) in the Next Year

Destination Analysts
DO YOUR RESEARCH

THE FEMALE TRAVELER

Familiarity, Past Visitation & Likelihood to Visit Maryland

- **40.2%** / 39.4% — Familiar with MD's Leisure Product
- **40.2%** / 38.5% — Visited MD (Past 5 years)
- **42.1%** / 40.0% — Very Likely or Certain to Visit Next Year

Top Resources for Destination Inspiration

- **66.0%** / 59.7% — Friends/family (direct contact)
- **48.3%** / 49.2% — Online searches
- **34.6%** / 36.6% — Travel-planning websites
- **29.4%** / 29.0% — Official destination websites
- **27.4%** / 20.1% — Print magazine/Newspaper articles

Most Motivational Attributes to Take Overnight Leisure Trip to MD

- **53.6%** / 52.7% — Local seafood
- **44.0%** / 40.0% — Coastline, beaches, and water activities
- **32.5%** / 28.2% — Opportunities to relax and recharge
- **29.6%** / 24.0% — Opportunities to bond with family

Maryland Ad Recall (Past 6 Months)

- Yes: **13.1%** / 13.9%
- No: **86.9%** / 86.1%

Top Activities for Ideal MD Trip

- Enjoying local seafood: 60.7% / 58.4%
- Visiting the beach: 56.9% / 53.6%
- Going sightseeing: 45.3% / 42.8%
- Visiting historical sites: 44.9% / 46.1%
- Enjoying the local culinary scene: 44.9% / 58.4%

Overnight Leisure Trips Taken/Anticipated

- **4.1** / 4.1 — Taken In The Past Year
- **3.4** / 4.0 — Anticipated Trips (OUTSIDE primary state of residence) in the Next Year

Destination Analysts
DO YOUR RESEARCH

NEXT STEPS:

- FIELD POST-CAMPAIGN SURVEY AFTER LABOR DAY (WEEK OF SEPTEMBER 2ND)

- RESULTS DELIVERED BY 10/31/19

THANK YOU