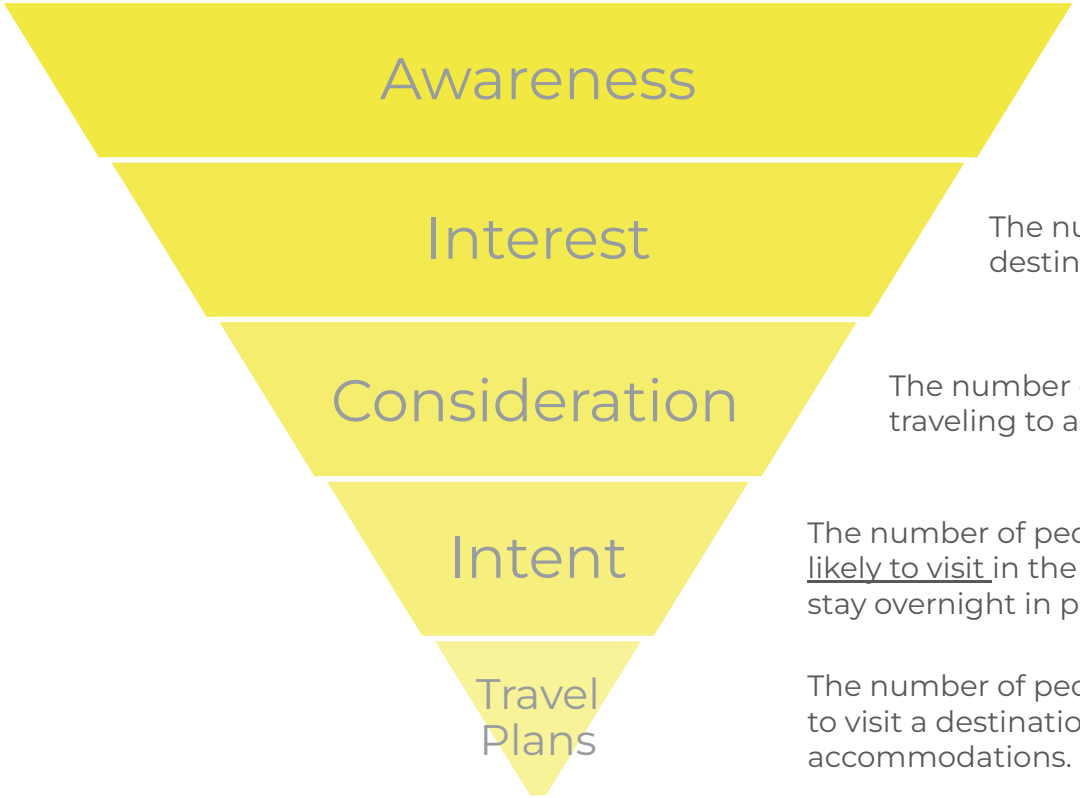
Voice of the Visitor

Combines data from the Engaged Traveler Survey of DMO engaged travelers (ETS) and the Travel Intent Survey (TIS) of general population leisure travelers in 8 markets.

Travel Intent

Measuring Travel Intent



The number of people aware of a destination (in the case of a state, we can assume 100% awareness).

The number of people who are interested in a destination or find it enticing in general.

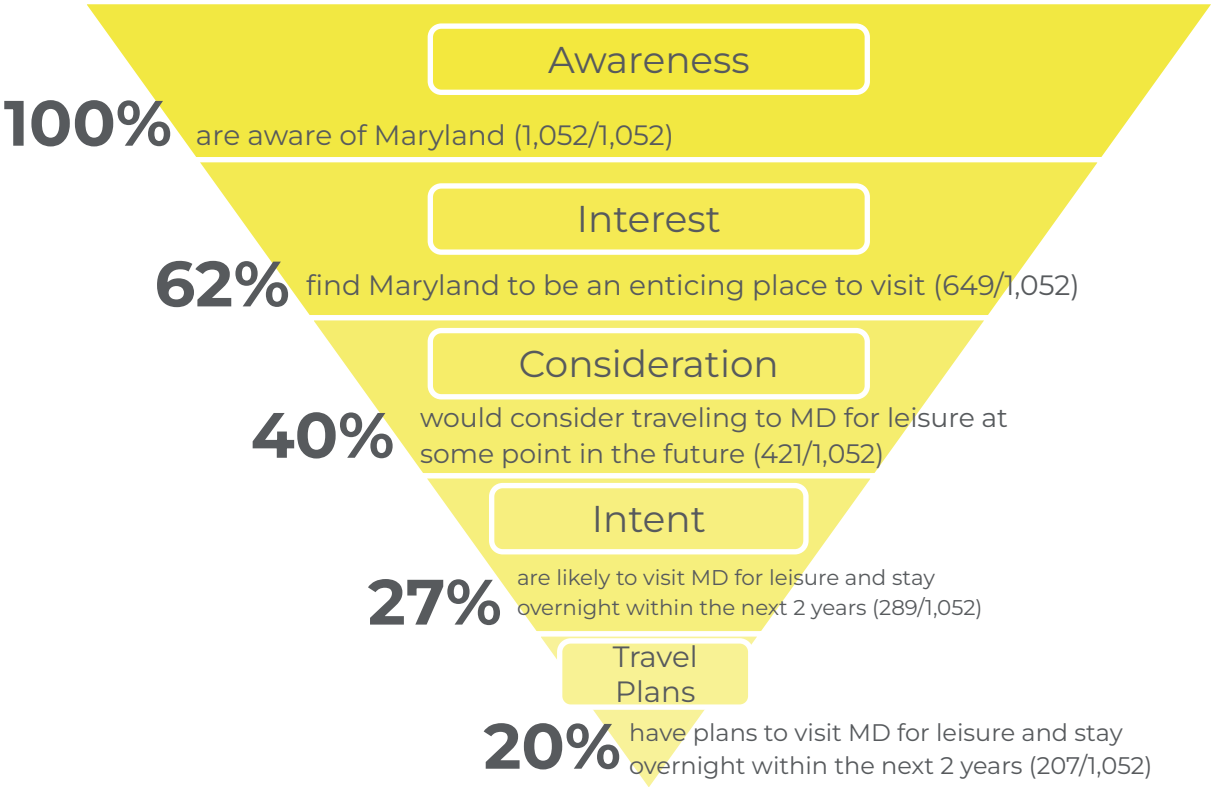
The number of people who would consider traveling to a destination.

The number of people who intend to travel (are likely to visit in the future) to a destination and stay overnight in paid accommodations.

The number of people who already have plans to visit a destination and stay overnight in paid accommodations.

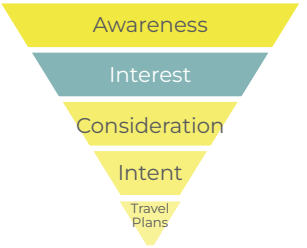
For clarification on terminology, you can click here.

Measuring Travel Intent

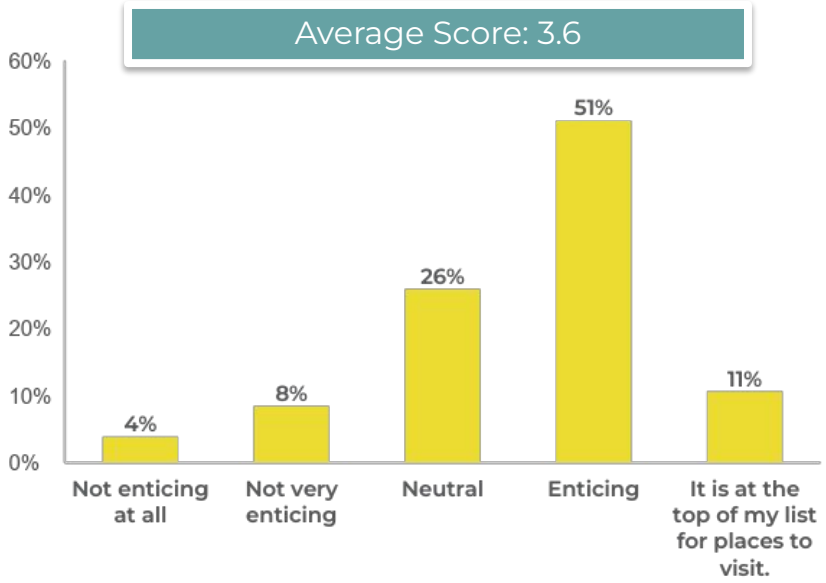


Source: Travel Intent Survey (random leisure travelers)
For clarification on terminology, you can click here.

Enticement Score



- 62% of TIS respondents find Maryland to be an enticing place to visit.
  - New Yorkers, Millennials, parents with kids, and African-Americans find it more enticing.
  - Ohio markets (Cincinnati and Cleveland), those without kids, and Boomers find it less enticing.
  - Note: scale is 1 (Not enticing) to 5 (It is at the top of my list)

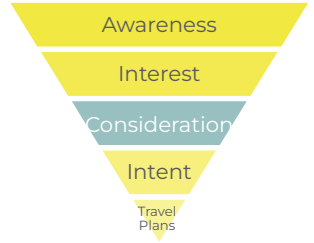


		MD Enticement Score
Market	Baltimore	3.7
	Pittsburgh	3.5
	Philadelphia	3.7
	Washington DC	3.6
	Columbus	3.4
	Cleveland	3.4 ▼
	New York	3.7 ▲
	Cincinnati	3.3 ▼
Children at home	DOES have kids under 18 at home	3.8 ▲
	Does NOT have kids under 18 at home	3.4 ▼
Generations	Boomers	3.4 ▼
	Gen X	3.5
	Millennials	3.8 ▲
Ethnicity	Caucasian/white	3.5
	African-American/Black	3.9 ▲
	Asian	3.4
	Hispanic/Latinx	3.7
	Prefer not to answer	4.0
	Other	3.4

Source: Travel Intent Survey (random leisure travelers, all)

Q: To you, how enticing is Maryland as a place to visit for an overnight leisure trip? Please rate on a 5-point scale where 1 = Not enticing at all and 5 = It is at the top of my list for places to visit.

Past State Travel & Consideration



	Have visited	Would consider visiting
Delaware	24% ▼	32% ▼
District of Columbia	38%	36% ▼
Florida	70% ▲	69% ▲
Maine	23% ▼	45%
Massachusetts	30% ▼	42%
Maryland	**44% ▲**	**40%**
New Jersey	42%	37% ▼
New York	62% ▲	54% ▲
North Carolina	42%	51% ▲
Pennsylvania	55% ▲	44%
South Carolina	40%	50% ▲
Virginia	45% ▲	50% ▲
None of the above	1% ▼	0% ▼

- 44% of respondents have visited Maryland for leisure in the past, and 40% would consider visiting in the future.

Source: Travel Intent Survey (random leisure travelers, all)

Q: For the following list, please indicate in the first column 1) if you have ever traveled for leisure in that state and 2) whether you would ever consider traveling there for leisure in the future.

Differences in Past Visitation (to MD)

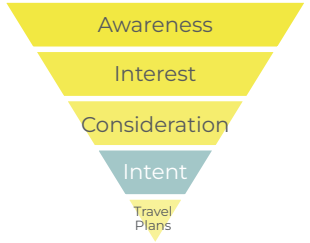
Past Visitation			
		Non-visitor	Past visitor
Market	Baltimore	9% ▼	21% ▲
	Pittsburgh	13%	16%
	Philadelphia	11% ▼	18% ▲
	Washington DC	11% ▼	19% ▲
	Columbus	13% ▲	5% ▼
	Cleveland	12% ▲	6% ▼
	New York	17% ▲	11% ▼
	Cincinnati	13% ▲	5% ▼
Generations	Boomers	32% ▼	39% ▲
	Gen X	30%	34%
	Millennials	38% ▲	27% ▼
Resident Status	Non-resident	86% ▲	66% ▼
	MD Resident	14% ▼	34% ▲
Children at home	DOES have kids under 18 at home	48% ▲	34% ▼
	Does NOT have kids under 18 at home	52% ▼	66% ▲
Column Sample Size		593	459

- Baltimore, D.C., and Philadelphia residents were most likely to have traveled in Maryland for leisure in the past.
- Boomers, non-Maryland residents, and visitors who do NOT have kids at home are LESS likely to have traveled in MD for leisure.

Source: Travel Intent Survey (random leisure travelers, all)

Q: For the following list, please indicate in the first column 1) if you have ever traveled for leisure in that state and 2) whether you would ever consider traveling there for leisure in the future.

Likelihood to Visit/Intent



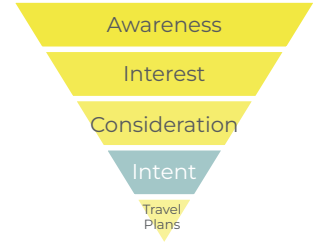
Likelihood to visit overnight for leisure within 2 years

	Not likely	I may or may not visit	Likely
New York	3%	22%	75%
Pennsylvania	2%	24%	74%
Maryland	4%	28%	68%
Virginia	5%	30%	65%
District of Columbia	6%	33%	61%
Delaware	9%	38%	53%

- TIS respondents were more likely to visit Maryland than Virginia, D.C., and Delaware.
- They were less likely to visit Maryland than New York and Pennsylvania.

Source: Travel Intent Survey (random leisure travelers)
Q: For each of the states listed below that you would consider for a leisure trip, how likely is it that you would visit that state and stay overnight within the next two years?

Differences in Intent to Visit

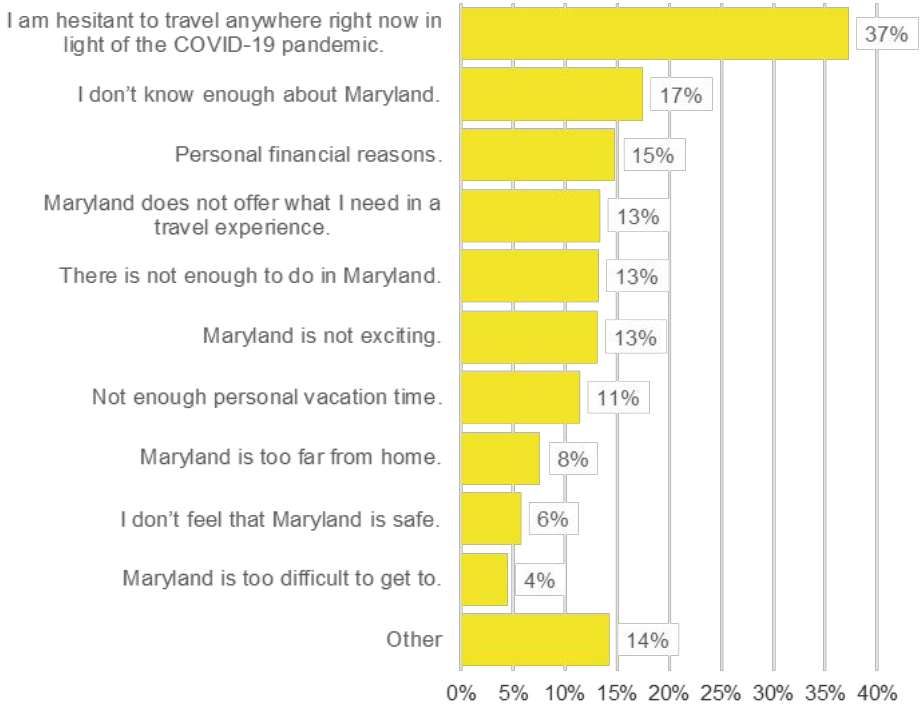


Future Intent to Visit			
		Not likely visit MD	Likely to visit MD
Market	Baltimore	55% ▼	45% ▲
	Pittsburgh	71%	29%
	Philadelphia	69%	31%
	Washington DC	63% ▼	37% ▲
	Columbus	81% ▲	19% ▼
	Cleveland	89% ▲	11% ▼
	New York	81% ▲	19% ▼
	Cincinnati	83% ▲	17% ▼
Generations	Boomers	75%	25%
	Gen X	71%	29%
	Millennials	72%	28%
Resident Status	Non-resident	77% ▲	23% ▼
	MD Resident	57% ▼	43% ▲
Children at home	DOES have kids under 18 at home	73%	27%
	Does NOT have kids under 18 at home	72%	28%
Column Sample Size		763	289

- Baltimore and D.C. residents are most likely to travel to MD for leisure in the future.
- MD residents are more likely than non-residents to travel in Maryland for leisure.
- 45% of Baltimore travelers intend to travel in Maryland within 2 years compared to 25% on average for the 7 other target markets combined.

Source: Travel Intent Survey (random leisure travelers, who would consider MD for a future leisure trip)
Q: For each of the states listed below that you would consider for a leisure trip, how likely is it that you would visit that state and stay overnight within the next two years?

Deterrents for Future Visitation



- If a traveler will consider Maryland for a future leisure trip but is **unlikely to take an overnight Maryland leisure trip in the next 2 years**, it is usually because they are hesitant to travel *anywhere* right now in light of COVID-19.

- Other reasons are not knowing enough about Maryland or personal financial reasons.

- Around 13% of those not likely to visit have reported each of the following, respectively:
  - Maryland does not offer what they need in a travel experience.
  - There is not enough to do in Maryland.
  - They don't think Maryland is exciting.

Source: Travel Intent Survey (random leisure travelers, those not likely to visit Maryland)
Q: What is deterring you from considering a Maryland overnight leisure trip? Select all that apply. .

Growth Opportunities

Demographics		Needs more info
Generations	Gen X	36% ▲
	Boomers	35%
	Millennials	30%
Market	Pittsburgh	15%
	Columbus	15% ▲
	Philadelphia	15%
	Cleveland	14%
	Cincinnati	14%
	New York	13%
	Washington DC	8% ▼
	Baltimore	6% ▼
Ethnicity	Caucasian/white	77%
	Asian	12%
	African-American/Black	8% ▼
	Hispanic/Latinx	4%
Visitor Status	Non past visitor	77% ▲
	Past visitor	23% ▼

Future Travel to States	Needs more info
Florida	68%
North Carolina	48%
South Carolina	46%
New York	43%
Maine	37%
Virginia	34% ▼
Pennsylvania	34%
Massachusetts	33%
District of Columbia	26%
New Jersey	26%
Delaware	16% ▼
Maryland	15%
None of the above	0%

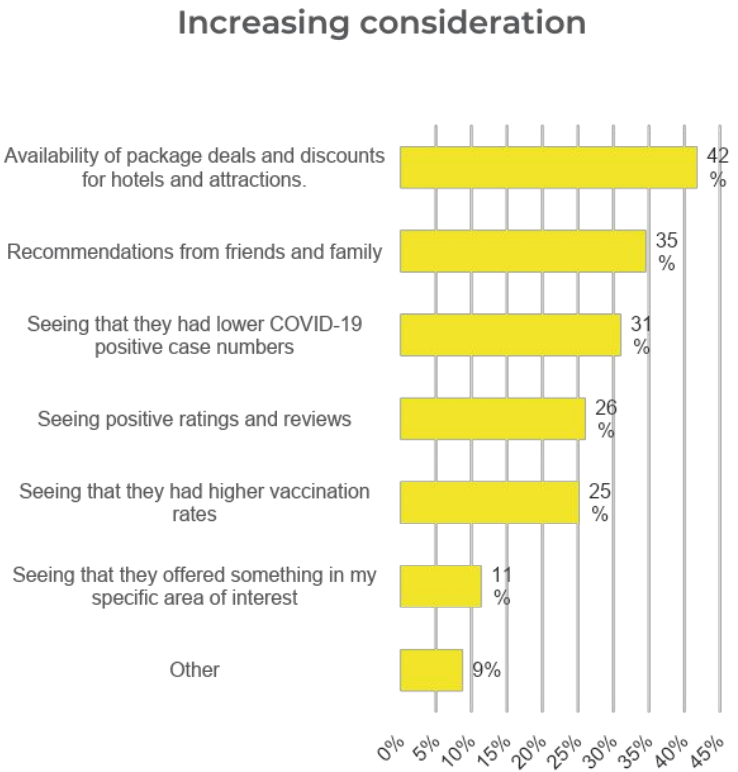
Column %	Needs more info
Seafood/Crabs	68%
Chesapeake Bay	51%
Beaches	36% ▼
Waterfront towns	29% ▼
History & heritage	28% ▼
Outdoor recreation	20% ▼
Professional sports	19%
Water activities	19% ▼
Varied landscapes	18% ▼
Affordable	17% ▼
Great food/culinary scene	13% ▼
Mountains	12% ▼
Easy to get around	11% ▼
Arts & culture	11% ▼
TV shows/film	9%
There is a lot to see and do	9% ▼
Unique experiences	9% ▼
Great healthcare	7%
Farms and agriculture	6% ▼

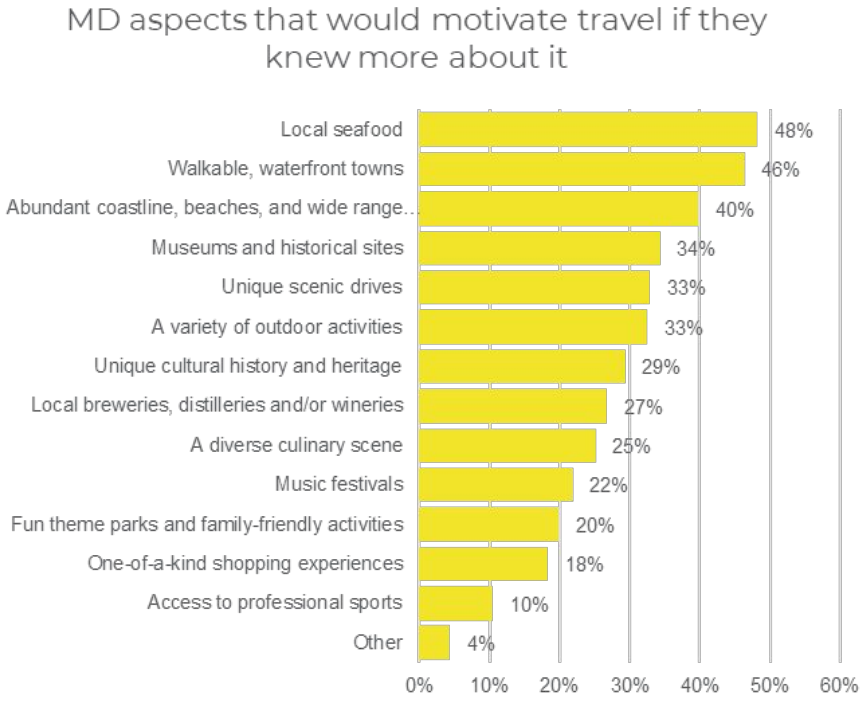
- 13% of respondents said they didn't know enough about Maryland, Maryland does not offer what they need or there isn't enough to do. These respondents might benefit from an educational initiative.
- These respondents are white and Gen X; they are not typically past visitors to MD, and more likely to be from Pennsylvania or Ohio.
- They are more likely to travel to Florida, North Carolina or South Carolina than Maryland or Delaware.
- They are much less likely to associate Maryland with beaches and waterfront towns.

Source: Travel Intent Survey (random leisure travelers, those not likely to visit Maryland)

Q: What is deterring you from considering a Maryland overnight leisure trip? Select all that apply. SUBSET: those who answered I don't know enough, there is not enough to do, or Maryland does not offer what I need.

Motivators for Future Visitation





Source: Travel Intent Survey (random leisure travelers, those who are not likely to visit MD)

Q: What would make you more likely to consider making a Maryland overnight leisure trip? Select all that apply.

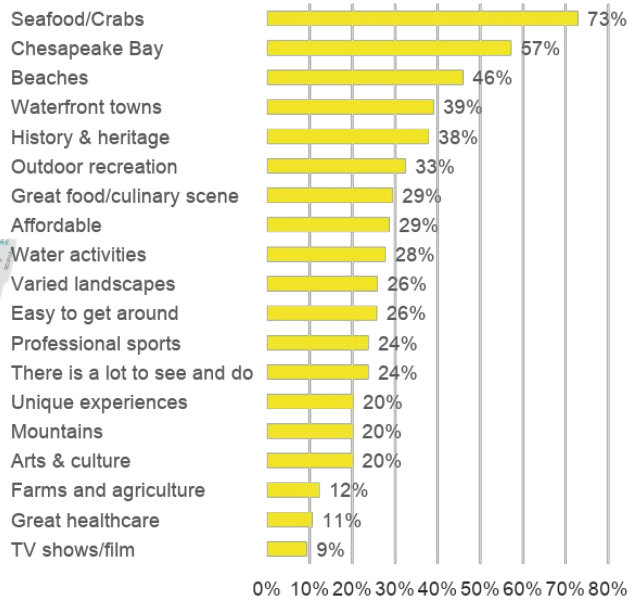
Q: Which of the following aspects of Maryland, if you knew more about it, might motivate you to consider choosing Maryland for an overnight leisure trip? Select all that apply.

Respondent Perceptions

Perceptions of Maryland Overall

- Unaided, TIS respondents tended to describe Maryland in terms of destinations and associations:
  - Baltimore
  - Ocean City
  - Annapolis
  - Crabs/crab cakes/seafood
  - Ocean
  - Mountains
  - Beaches
  - Fun
  - History/historical

- When given a list, they tended to associate Maryland with seafood crabs (73%), Chesapeake Bay (57%), and beaches (46%).

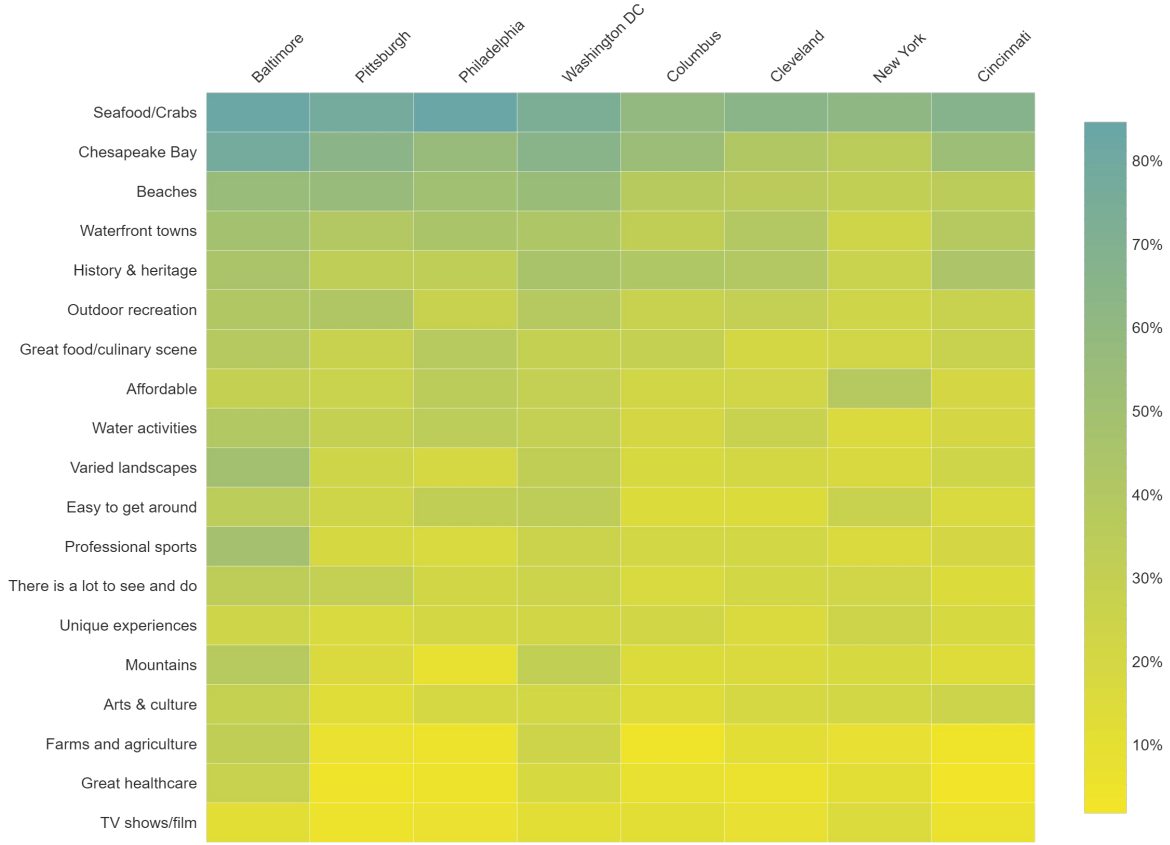


Source: Travel Intent Survey (random leisure travelers, all)

Q: Today we will be talking specifically about the state of Maryland. Please share 3 words or phrases that first come to mind when you think of the state of Maryland overall.

Q: Which of the following come to mind when you think of the state of Maryland overall? Please select all that apply.

Perceptions of Maryland by Market



In our survey, we asked respondents to select from a given list of attributes any/all the things that come to mind when they think of the state of Maryland. The graph here represents the level of perception or association of the attribute per market surveyed. The darker the color means the stronger the perception or association.

- ALL markets chose seafood/crabs as the first thing that comes to mind when they think of Maryland.
- Baltimore residents used more terms overall to describe Maryland.
- Pittsburgh residents are more likely to say Chesapeake Bay, beaches and outdoor recreation.
- Philadelphia residents are more likely to say Great food/culinary scene.
- D.C. residents are more likely to say history and heritage, easy to get around, and mountains.
- New Yorkers are more likely to say affordable.

Source: Travel Intent Survey (random leisure travelers, all)
Q: Which of the following come to mind when you think of the state of Maryland overall? Please select all that apply.

Differences in Overall Maryland Perceptions

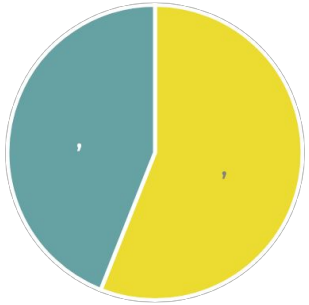
	Visitor Status		Resident Status		Generations			Children at home	
	Non-visitor	Past visitor	Non-resident	MD Resident	Boomers (58-78)	Gen X (43-57)	Millennials (28-42)	DOES have kids under 18 at home	Does NOT have kids under 18 at home
Seafood/Crabs	66% ▼	81% ▲	70% ▼	83% ▲	83% ▲	74%	61% ▼	62% ▼	81% ▲
Chesapeake Bay	49% ▼	68% ▲	52% ▼	76% ▲	72% ▲	56%	43% ▼	43% ▼	68% ▲
Beaches	40% ▼	54% ▲	43% ▼	57% ▲	52% ▲	41% ▼	45%	40% ▼	51% ▲
Waterfront towns	32% ▼	48% ▲	36% ▼	48% ▲	47% ▲	37%	33% ▼	31% ▼	45% ▲
History & heritage	31% ▼	47% ▲	35% ▼	47% ▲	49% ▲	37%	28% ▼	28% ▼	45% ▲
Outdoor recreation	28% ▼	38% ▲	29% ▼	44% ▲	34%	30%	34%	33%	32%
Great food/culinary scene	25% ▼	36% ▲	28% ▼	35% ▲	30%	26%	32%	29%	30%
Affordable	23% ▼	36% ▲	29%	28%	29%	23% ▼	34% ▲	29%	28%
Water activities	23% ▼	34% ▲	25% ▼	38% ▲	29%	27%	27%	29%	27%
Varied landscapes	24% ▼	29% ▲	20% ▼	46% ▲	30% ▲	23%	25%	26%	26%
Easy to get around	19% ▼	34% ▲	24% ▼	33% ▲	27%	23%	28%	27%	25%
Professional sports	20% ▼	28% ▲	19% ▼	39% ▲	25%	26%	20%	21%	26%
There is a lot to see and do	18% ▼	31% ▲	21% ▼	32% ▲	28% ▲	18% ▼	24%	21%	25%
Unique experiences	20%	21%	19%	23%	17%	20%	24% ▲	27% ▲	15% ▼
Mountains	18% ▼	23% ▲	15% ▼	38% ▲	24% ▲	16% ▼	20%	20%	20%
Arts & culture	18% ▼	23% ▲	18% ▼	26% ▲	17%	21%	22%	25% ▲	17% ▼
Farms and agriculture	8% ▼	17% ▲	6% ▼	34% ▲	17% ▲	11%	9% ▼	10% ▼	14% ▲
Great healthcare	9%	12%	7% ▼	25% ▲	10%	9%	13% ▲	13% ▲	9% ▼
TV shows/film	12% ▲	6% ▼	9%	11%	2% ▼	9%	17% ▲	16% ▲	5% ▼

- Non-visitors and Non-residents chose fewer words overall to describe Maryland.
- Millennials are more likely to say MD is affordable and has unique experiences.
  - Non-visitors (especially Millennials and those with kids) are more likely to associate MD with TV shows/film.

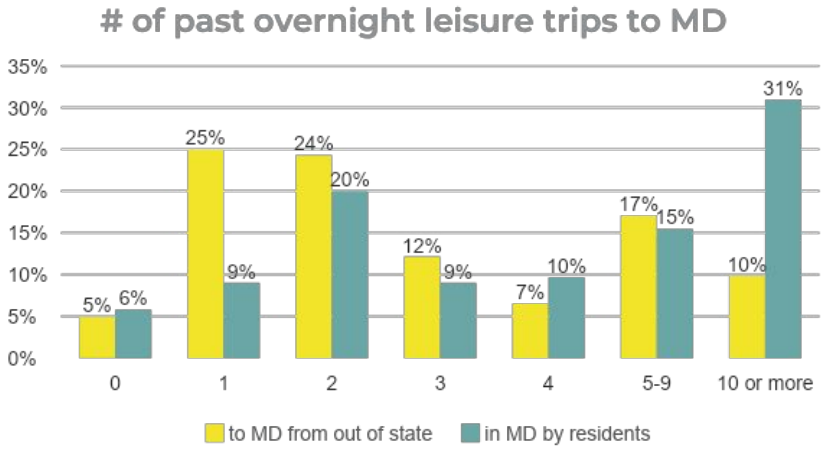
Source: Travel Intent Survey (random leisure travelers, all)
Q: Which of the following come to mind when you think of the state of Maryland overall? Please select all that apply.

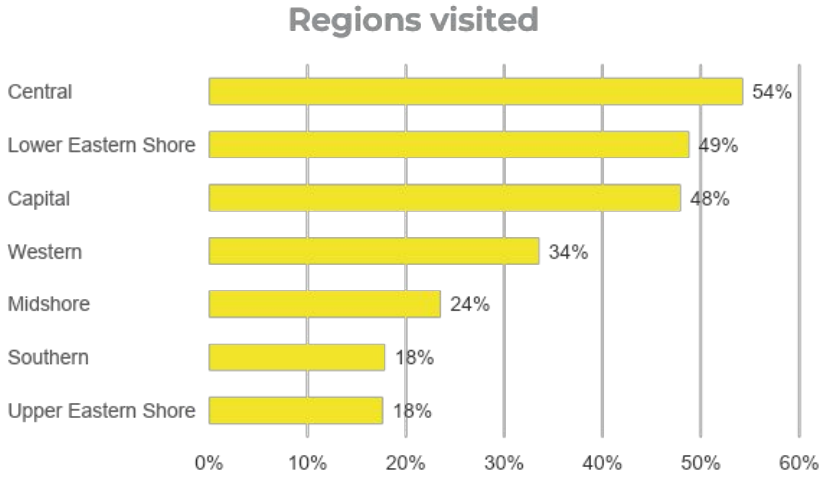
Visitor Behaviors: Past & Future

Past Visitation to Maryland (TIS)



- 44% of respondents have traveled for leisure in Maryland in the past.
  - Maryland residents have made more overnight leisure trips than those that live out of state--nearly a third have made 10 or more trips.
  - Half of out of state residents have made 1-2 overnight leisure trips to Maryland.
  - Visitors were most likely to visit the Central Region (54%), the Lower Eastern Shore (49%) and the Capital Region (48%).

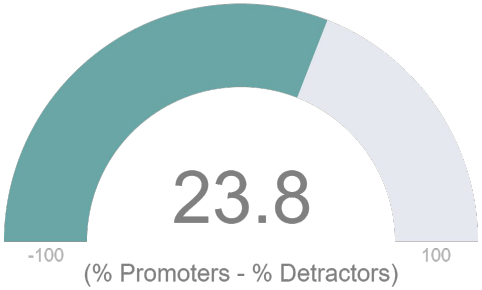




Source: Travel Intent Survey (random leisure travelers, past MD visitors)
Q: For the following list, please indicate if you have ever traveled for leisure in that state.
Q: You mentioned you had traveled to Maryland for leisure in the past. How many times have you visited Maryland in the past where you stayed overnight in paid accommodations?
Q: In the map below, the state is divided into seven (7) major regions. Please click on the regions you have visited in the past, turning each green. Select all that apply.

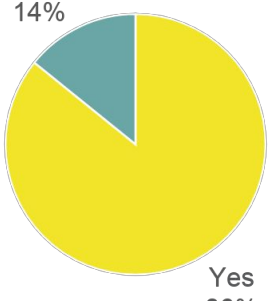
Statewide Past Visitors (DMO Engaged Audience)

Net promoter score



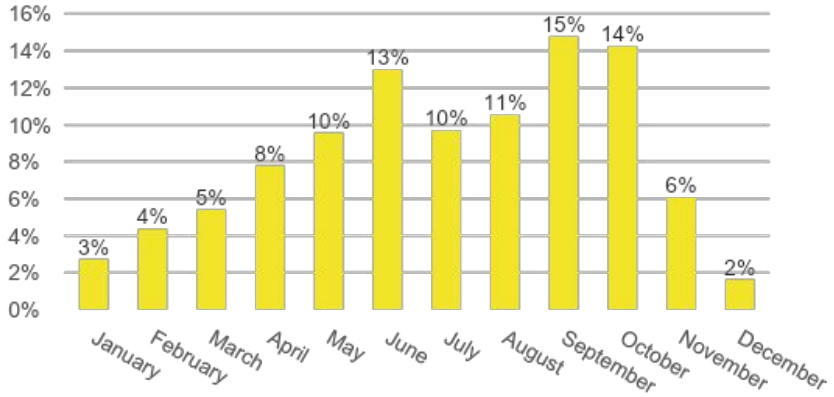
Avg# of past trips

Overnight stay?

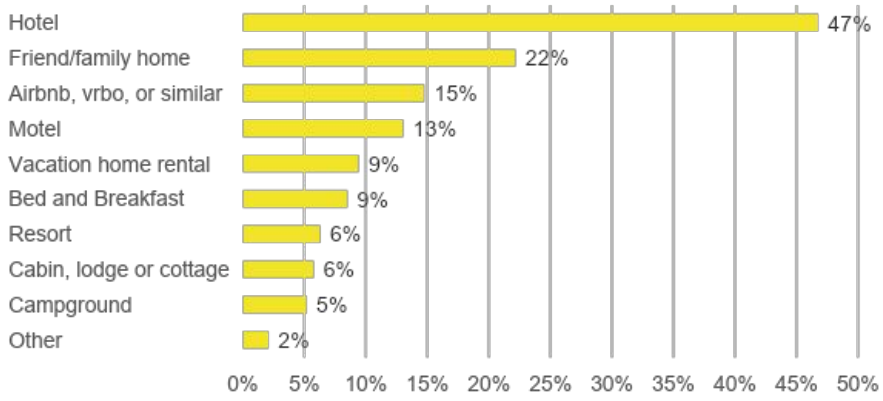


Avg # of nights stayed

Month of most recent visit



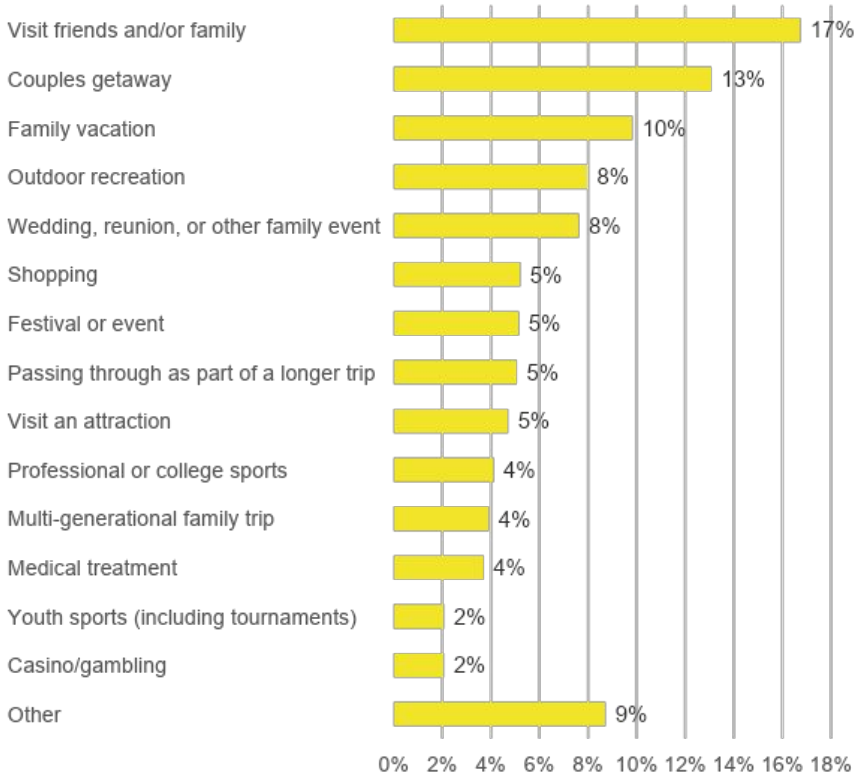
Lodging for most recent vist



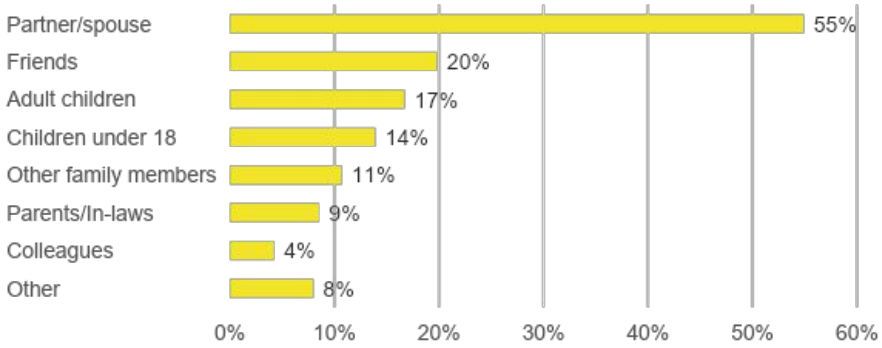
Source: Engaged Traveler Survey (travelers responding via DMO), weighted by 2019 visitor volume

Statewide Past Visitors (DMO Engaged Audience)

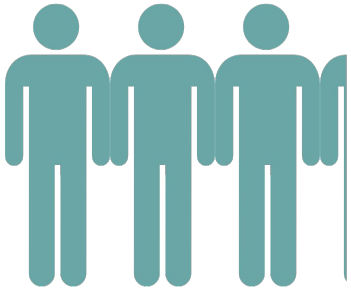
They came for the purpose of:



They traveled with:



Avg party size



3.3

Avg per trip spending

Source: Engaged Traveler Survey (travelers responding via DMO), weighted by 2019 visitor volume

Trip Spend Patterns, Past Travel

Generations	Most recent trip spending
Gen Z	$1,564 ▲
Millennials	$1,561 ▲
Gen X	$1,047
Boomers	$744 ▼

Lodging	Most recent trip spending
Vacation home rental	$2,335 ▲
Resort	$2,016 ▲
Airbnb, vrbo, or similar	$1,958 ▲
Cabin, lodge or cottage	$1,930 ▲
Bed and Breakfast	$1,924 ▲
Campground	$1,355
Friend/family home	$1,080 ▼
Hotel	$1,046 ▼
Other	$1,377

Primary trip purpose	Most recent trip spending
Multi-generational family trip	$2,244 ▲
Family vacation	$2,075 ▲
Medical treatment	$1,425
Casino/gambling	$1,362
Professional or college sports	$1,360
Youth sports (including tournaments)	$1,335
Wedding, reunion, or other family event	$1,264
Outdoor recreation	$1,234
Shopping	$1,167
Couples getaway	$1,127
Passing through as part of a longer trip	$1,089
Festival or event	$847 ▼
Visit friends and/or family	$717 ▼
Visit an attraction	$575 ▼
Other	$686 ▼
NET	$1,173

- Highest spending visitors per trip include:
  - Millennials and Gen Zs
  - Multigenerational families trip and family vacationers
  - Those renting a home or staying in a resort.

Source: Engaged Traveler Survey (travelers responding via DMO), weighted by 2019 visitor volume

Net Promoter Score Patterns, Past Travel

Generations	NPS Score
Boomers	45.2 ▲
Gen X	41.5 ▲
Millennials	11.8 ▼
Gen Z	-42.5 ▼
NET	23.6

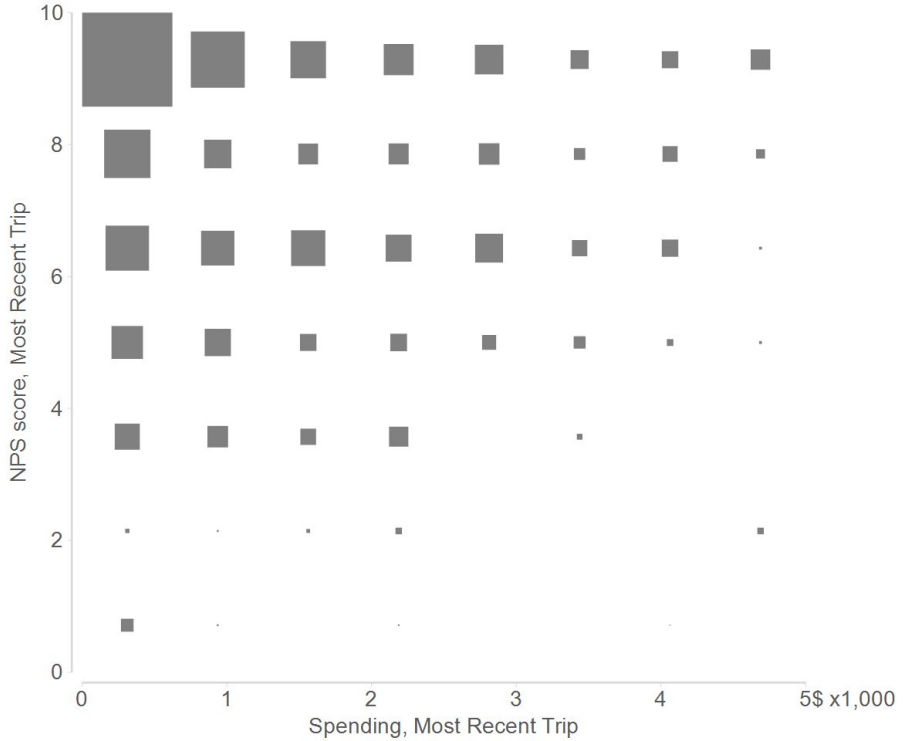
Lodging	NPS Score
Hotel	41.7 ▲
Friend/family home	12.2 ▼
Airbnb, vrbo, or similar	9.5 ▼
Campground	3.8
Vacation home rental	-7.2 ▼
Resort	-10.5 ▼
Bed and Breakfast	-17.9 ▼
Cabin, lodge or cottage	-37.2 ▼

Primary Trip Purpose	NPS Score
Visit an attraction	53.9 ▲
Family vacation	52.2 ▲
Festival or event	47.9 ▲
Couples getaway	37.8
Visit friends and/or family	19.3
Passing through as part of a longer trip	15.0
Outdoor recreation	14.3
Wedding, reunion, or other family event	12.7
Casino/gambling	10.6
Shopping	9.8
Professional or college sports	-1.5
Multi-generational family trip	-2.5
Youth sports (including tournaments)	-11.8
Medical treatment	-40.1 ▼
NET	24.5

- Those most likely to recommend visiting Maryland to others include:
  - Boomers and Gen Xers
  - Those staying in a hotel
  - Those visiting an attraction, on a family vacation, or coming for a festival or event

Source: Engaged Traveler Survey (travelers responding via DMO), weighted by 2019 visitor volume

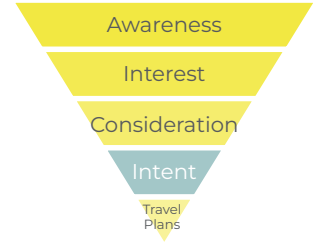
Correlating Spending and Net Promoter Score



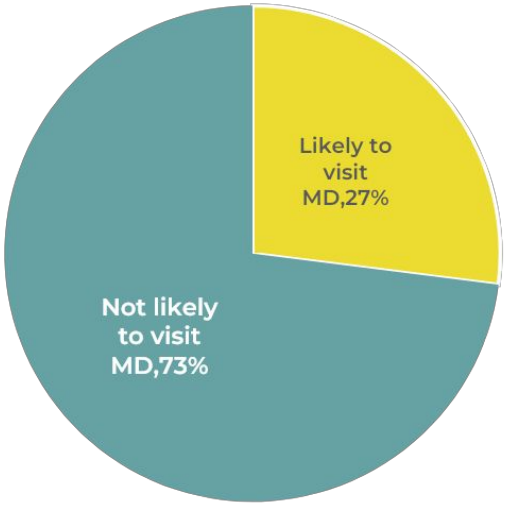
- Spending and NPS scores have a NEGATIVE correlation – for the most part, the less travelers spend per trip the more likely they are to recommend traveling to MD to others.
- This suggests that affordability is an important aspect of satisfaction, despite the fact that it was not a primary descriptor of the state of Maryland overall.

Source: Engaged Traveler Survey (travelers responding via DMO), weighted by 2019 visitor volume

Future Travel: Plans



Intent to Travel to MD



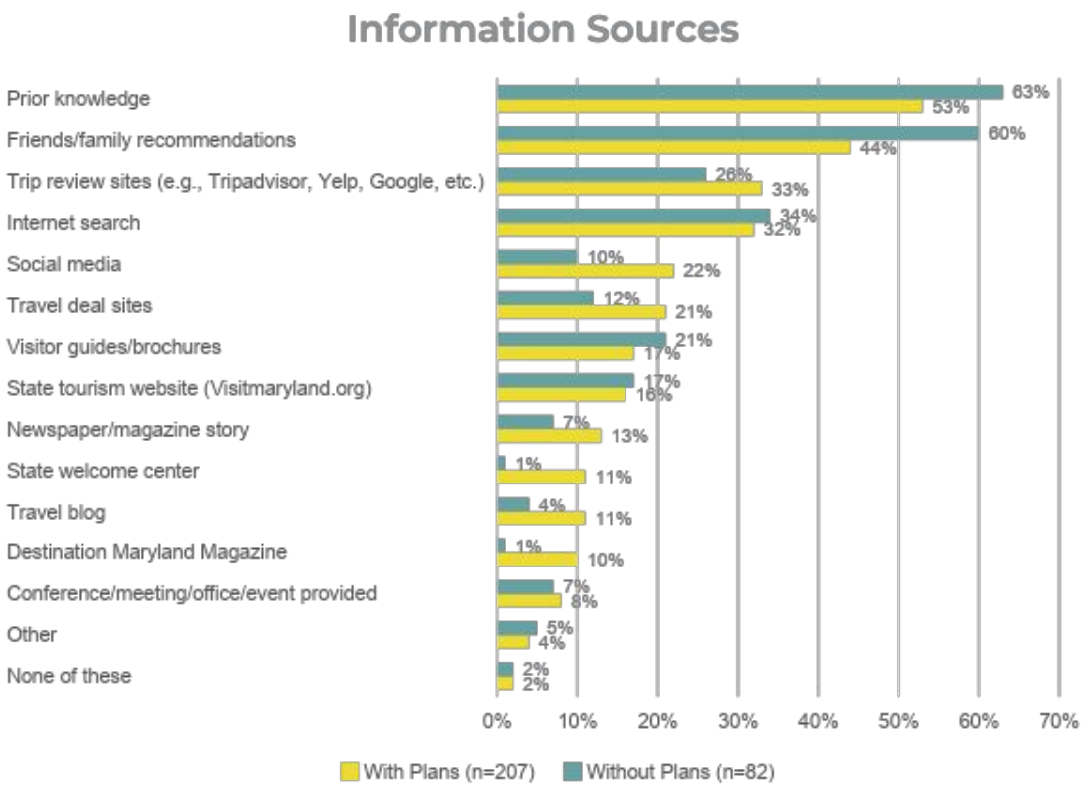
	Men	Woman	Millennials	Gen X	Boomers	n=
Yes, within the next year	75% ▲	54% ▼	75% ▲	70%	43% ▼	182
Yes, within the next 2 years	7%	10%	9%	6%	11%	25
No plans currently	18% ▼	36% ▲	16% ▼	24%	46% ▲	82

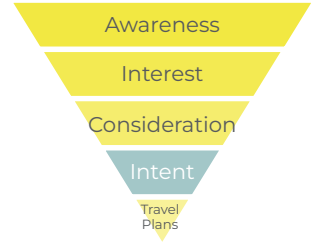
- 27% of respondents are likely to visit Maryland for leisure in the future.
  - 28% of those have no current plans; 72% DO have plans.
  - 63% of those with plans will visit within the next year.
- Millennials are most likely to have already planned travel; Boomers are least likely.
- Men are more likely than women to have already made plans.

Source: Travel Intent Survey (random leisure travelers)

Q: You mentioned you would be likely to travel in Maryland for leisure in the future. Do you currently have plans to travel in Maryland and stay overnight? (Survey conducted Oct 2021)

Future Travel: Information Sources

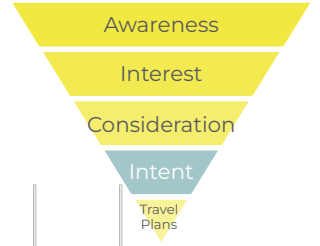




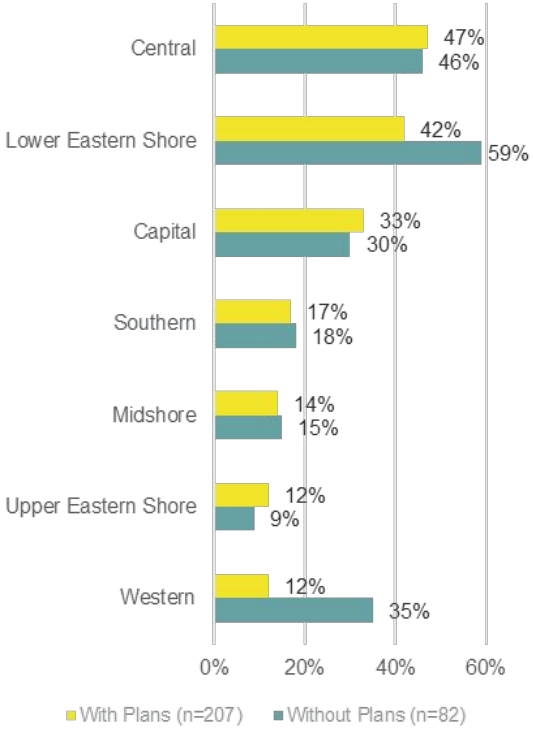
- Those likely to visit Maryland first use prior knowledge and recommendations. This is especially true for those with no current plans.
- Those who DO have current plans to travel to Maryland are more likely to use trip review sites, social media, travel deal sites, newspaper/magazine stories, state welcome centers, travel blogs and Destination Maryland Magazine.

Source: Travel Intent Survey (random leisure travelers, those likely to travel to MD)
Q: Which sources have influenced you in terms of inspiration, planning, research and/or preparing for a leisure trip to Maryland? Select all that apply.

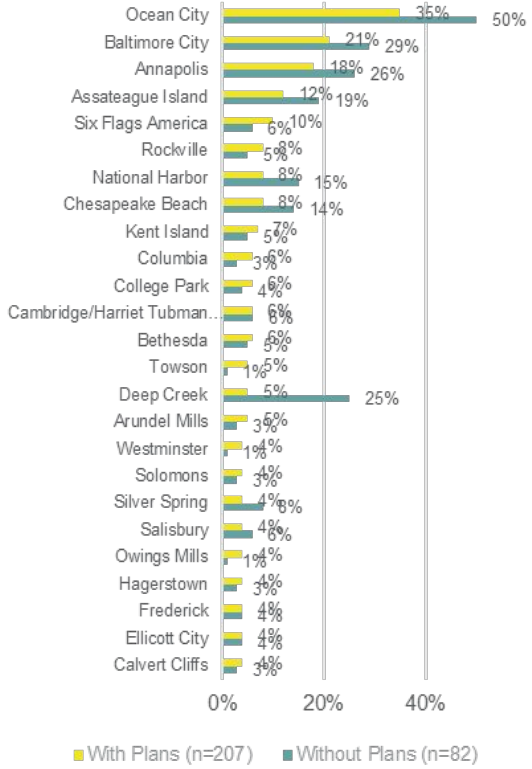
Future Travel: Destinations

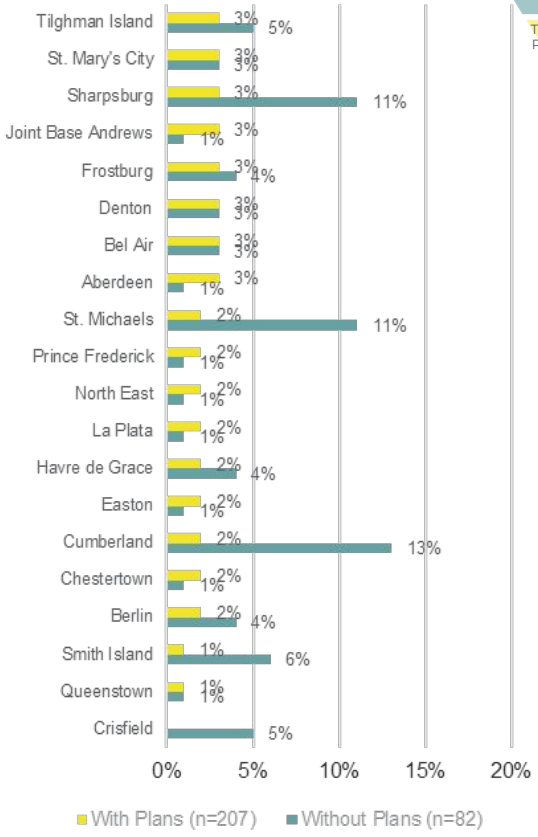


Regions



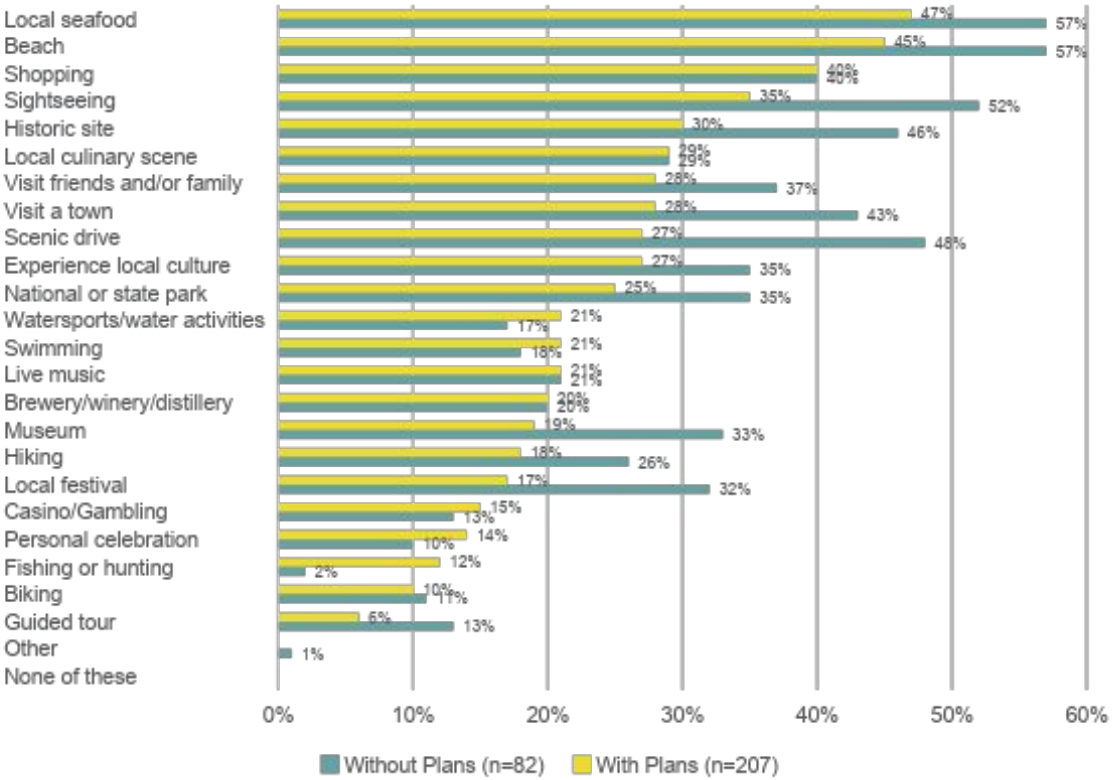
Travel Intent by Destination

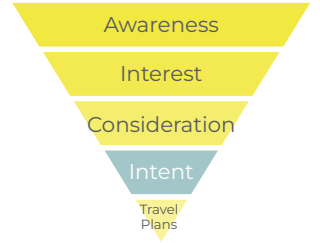




Source: Travel Intent Survey (random leisure travelers, those likely to travel to MD)
Q: (Without plans) If you were to plan an overnight trip in Maryland in the future, where would you potentially like to go?
Q: (With plans) Where do you plan to go on your upcoming overnight Maryland trip?

Future Travel: Activities



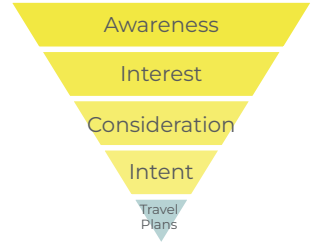


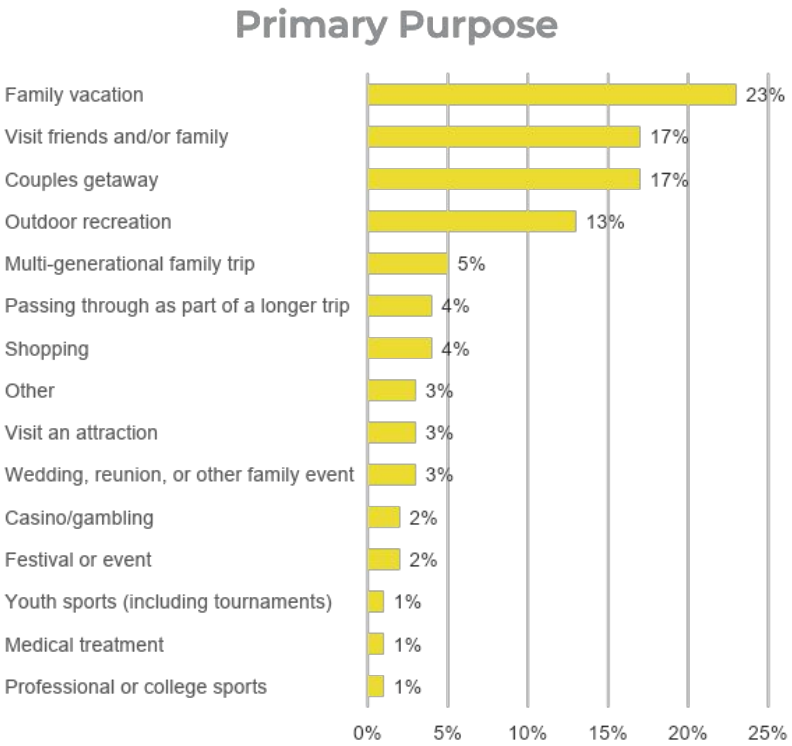
- Those who have made travel plans to Maryland were more likely to say they planned to do watersports, swimming, gambling, personal celebration, and fishing or hunting.

- With only a vague idea of things they might be interested in, those without current plans made more choices in general.
  - Activities of particular interest included sightseeing, scenic drives, historic sites, and visiting a town.

Source: Travel Intent Survey (random leisure travelers, those likely to travel to MD)
Q: (Without plans) If you were to plan an overnight trip to Maryland in the future, what would you potentially like to do? Please select all that apply.
Q: (With Plans) On your upcoming Maryland trip, which of the following are you interested in doing or intending to do? Please select all that apply.

Future Travel: Trip Drivers





Festival/ Event Drivers

Civil War, Elvis, BBQ and Bourbon, Wine Fest

Attraction Drivers

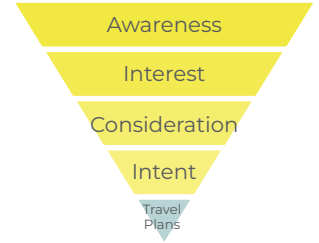
Patuxent River, Naval Museum, Ram's Head Annapolis, Beach, Baltimore, Inner Harbor, University of Maryland, Chesapeake Bay, Baltimore Aquarium, MGM

Other Reasons

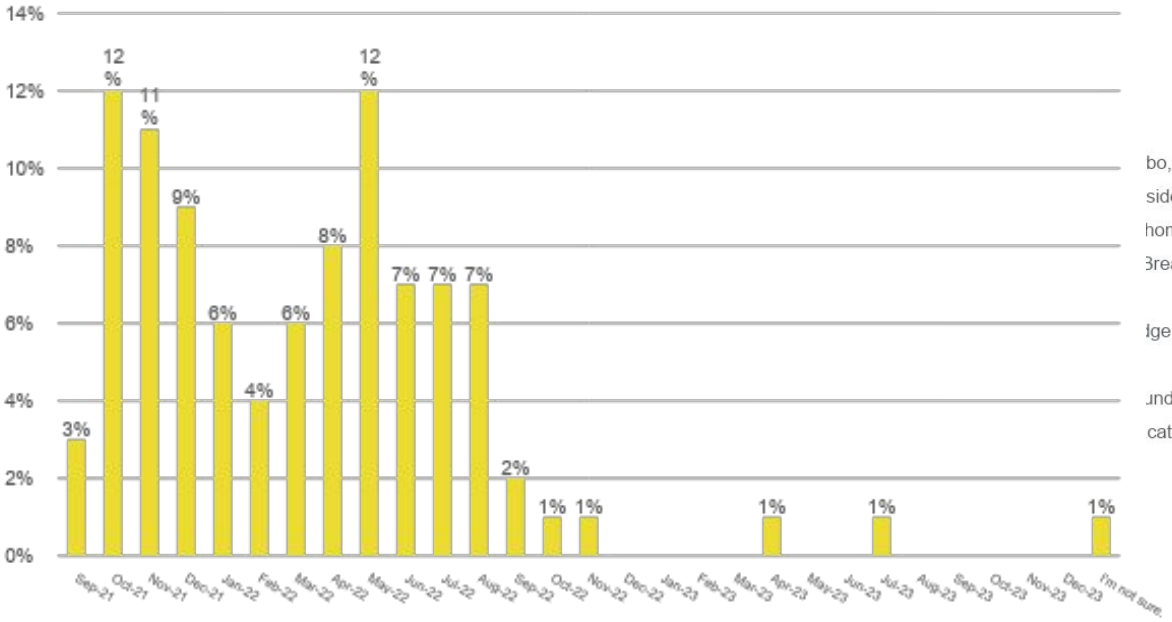
Concert at Merriweather Post Pavilion, live entertainment, to get away, conference, leisure, Gals trip, food, fossil hunting

Source: Travel Intent Survey (random leisure travelers, those likely to travel to MD with plans)
Q: What is the primary reason for your upcoming Maryland overnight trip? Please choose the one reason that best matches your plans from the list below.

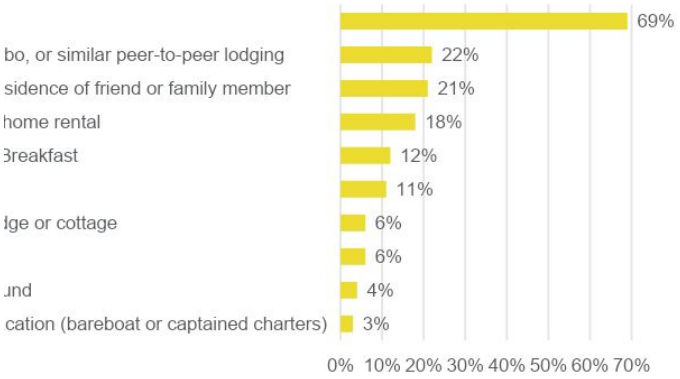
Future Travel: Trip Plans



Timeline for Travel



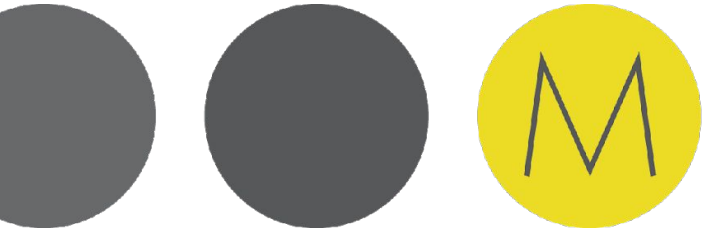
Lodging



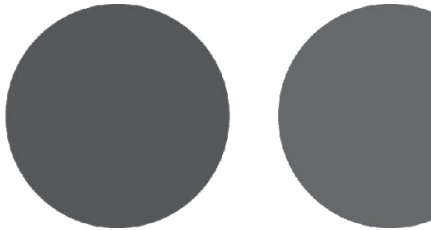
Source: Travel Intent Survey (random leisure travelers, those likely to travel to MD with plans)

Q: When are you planning to travel on your upcoming overnight Maryland trip? (It's ok if you pick a tentative date. Just let us know what you're thinking.)

Q: On your upcoming Maryland overnight trip, where would you like to stay/plan to stay? Please select all the lodging types you are considering.



Thank you!



Shannon Gray
CEO/Founder | Gray Research Solutions
shannon@grayresearchsolutions | 615.925.1304