Maryland Travel & Tourism: Predictive Analysis

February 10, 2022

marriner marketing
let clarity define you.®

Project Goals and Scope

Goals for the Travel & Tourism Predictive Analysis
- Analyze the current situation of COVID-19 in Maryland including its impacts regionally and statewide, vaccine distribution and recovery outlook in order to identify Maryland areas that have been hit the hardest by and/or those that may need more effort for recovery.
- Understand the potential future of tourism under the COVID-19 environment to develop insights, trends and forecasts, to the end of helping tourism recovery in Maryland.
- Identify the target segments and origin markets most likely to travel to Maryland, and which region(s) they are most likely to visit.
- Prove the economic value of tourism to the state of Maryland and its regions, including tax revenues.

The scope of this project includes three methods to accomplish our research goals:

1) **Symphony Dashboard** by Tourism Economics
2) **Travel Intent by Market Survey** of travelers in Maryland's target markets
3) **Engaged Traveler Segmentation Survey** of visitors who receive information from Maryland DMOs

Project Methodology

Symphony Dashboard

Interactive dashboard of DMO data including
- Economic impact of tourism (2019)
- Lodging performance (by month since Jan 2020)
- Hotel forecast scenarios (through 2023)
- Forecast scenario impacts on jobs, wages, taxes, and spending (through 2023)
- Other tourism data including air traffic, employment, international visitors to Baltimore & Maryland, state park visitor insights, tourism tax revenue

provided by Tourism Economics

Travel Intent by Market Survey

1,052 general population leisure travelers in top 8 target markets
- Survey focused on projecting FUTURE visitation of general leisure travelers based on intent.
- Sample requirements:
- Must have traveled for leisure, past 3 years; Must intend to travel for leisure, next 2 years
- Between 25 and 72 years old
- At least $50,000 household income
- Representative Mix of ethnicities and genders
- 150 from Baltimore, DC, Pittsburgh, Philadelphia, metro NY (including southern Connecticut)
- 100 from Cleveland, Cincinnati, Columbus

provided by Dynata and Gray Research Solutions

Engaged Traveler Segmentation Survey

4,672 travelers who have "engaged" with a Maryland DMO via newsletter and/or social media
- Survey focused on understanding PAST visitation patterns of engaged MD travelers, including traveler types and regions.
- 23 out of 26 DMOs + MD OTD participated.
- Overall results were weighted with respect to visitor volume data from Symphony.

provided by Maryland DMOs and Gray Research Solutions

Presentation Overview

- Economic Value of Tourism
- Current COVID-19 Landscape in Maryland
- Recovery Outlook & Forecasts
- Voice of the Visitor
  - Terminology
  - Travel Intent
  - Respondent Perceptions
  - Visitor Behaviors: Past & Future
  - Visitor Perceptions & Behaviors: By Region
    - Western
    - Capital
    - Southern
    - Central
    - Upper Shore
    - Mid-Shore
    - Lower Shore
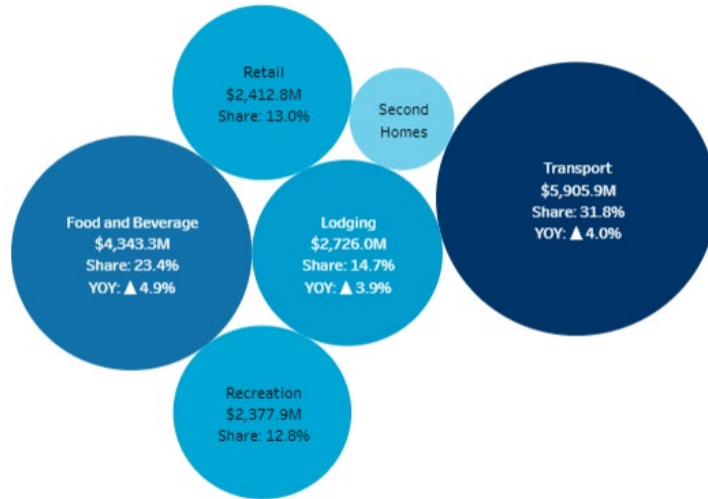- Visitor Segments

Economic Value of Tourism

Key Takeaways on the Value of Tourism

- In 2019, 42.12M visitors spent $18.6B while visiting Maryland. This generated $2.6B in state and local taxes, which is equivalent to $1,178 in tax savings for every Maryland household. Tourism supported 150,000 jobs and paid $6.6B in wages.

- In 2020, 24.73M visitors spent $11.6B while visiting Maryland. This generated $1.7B in taxes or the equivalent of $776 in tax savings per Maryland household. Tourism supported 104,300 jobs and paid $4.9B in wages.

	2019	2020
Total Visitor Spending	$18.6B	$11.6B
Total Visitors	42.12M	24.73M
Overnight visitor share	46.6%	46.5%
% of jobs sustained by visitor spending	6%	4.4%
State and Local taxes	$2.6B	$1.7B
Tax savings per household	$1,178	$776

Visitor Spending Categories

2019

Retail
$2,412.8M
Share: 13.0%

Second Homes

Transport
$5,905.9M
Share: 31.8%
YOY: ▲4.0%

Food and Beverage
$4,343.3M
Share: 23.4%
YOY: ▲4.9%

Lodging
$2,726.0M
Share: 14.7%
YOY: ▲3.9%

Recreation
$2,377.9M
Share: 12.8%

2020

Retail
$1,711.3M
Share: 14.7%
YOY: ▼-29.1%

Second Homes
$709.7M

Transport
$3,297.8M
Share: 28.4%
YOY: ▼-44.2%

Food and Beverage
$2,987.4M
Share: 25.7%
YOY: ▼-31.2%

Lodging
$1,519.9M
Share: 13.1%
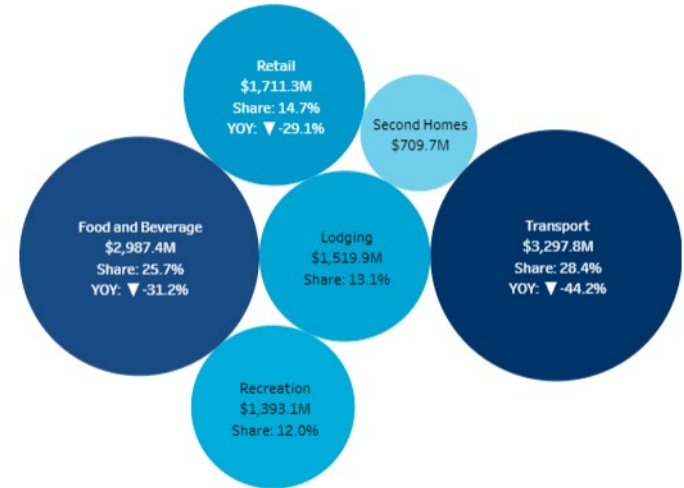
Recreation
$1,393.1M
Share: 12.0%

In 2019, actual visitor spending in Maryland totaled $18.6 billion. This was an increase of 3% over 2018.
- *32% was in Transportation*
- *23% was in Food and Beverage*
- *15% was in Lodging*
- *13% was in Retail*
- *13% was in Recreation*

In 2020, actual visitor spending in Maryland totaled $11.6 billion. This was a decrease of 38% over 2019.
- *28% was in Transportation*
- *26% was in Food and Beverage*
- *15% was in Retail*
- *13% was in Lodging*
- *12% was in Recreation*

Source: Tourism Economics Symphony dashboard, Maryland Economic Impact Study, 2019 and 2020. Data includes direct visitor spending.
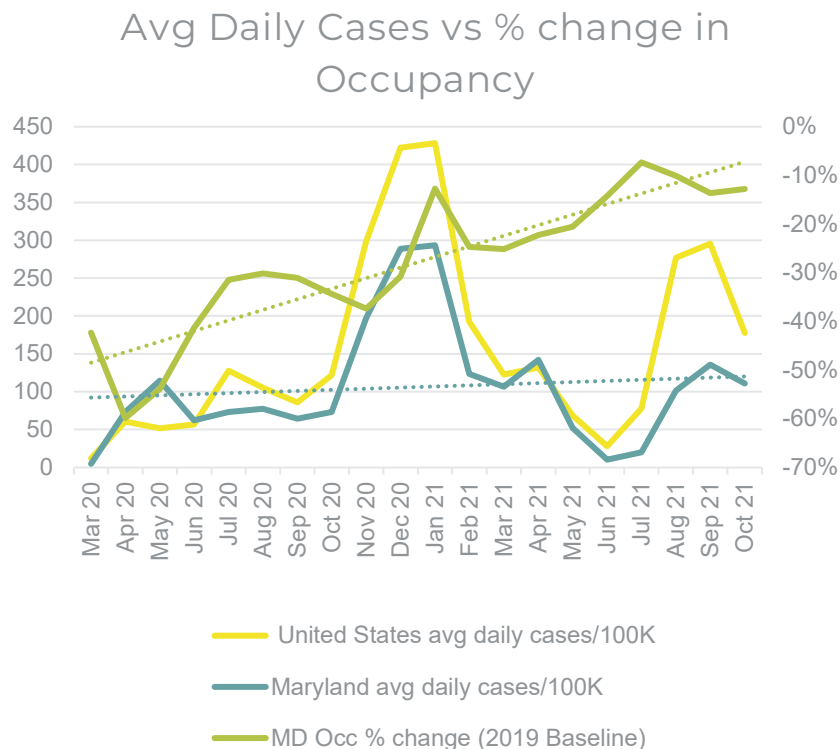
9

Current COVID-19 Landscape in Maryland

Key Takeaways on the COVID Landscape

- Maryland's tourism economy took a hit with COVID-19 like all other states, with peaks in cases in January of 2021 and January of 2022.
- In January of 2022, COVID peaked in Maryland at 12,000 new cases daily.
  - The Western and Eastern Shore regions have higher case rates than the other regions.
- As of January of 2022, 71% of Maryland residents were fully vaccinated, meeting the CDC's goal rate.
  - The Western and Eastern Shore regions also have lower vaccination rates than the other regions.
- Travel demand no longer moves up and down with case numbers or hospitalization rates as they did early in the pandemic, indicating that travel is less impacted by fluctuations and variants.
- In addition, experts predict a much milder impact of COVID-19 in 2022 due to increased immunity in the general population.

Back to Presentation Overview

COVID Cases & Occupancy in MD

Avg Daily Cases vs % change in Occupancy

Legend:
- United States avg daily cases/100K
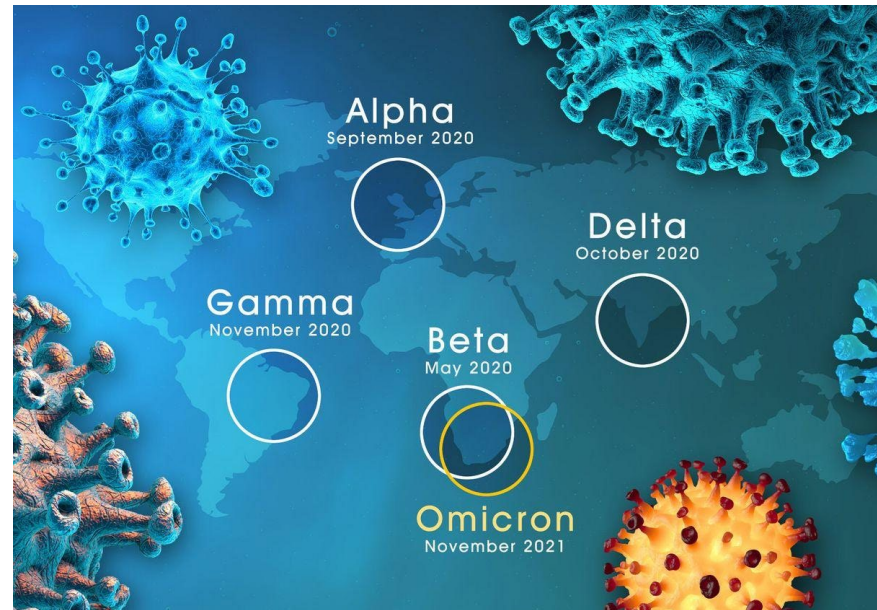- Maryland avg daily cases/100K
- MD Occ % change (2019 Baseline)

- At the beginning of the pandemic, occupancy tracked with COVID cases.
  - This makes sense since lockdowns were in place and travel was greatly limited.
- However, after that initial period (after just a few months), MD occupancy rates began trending upwards without a direct correlation with COVID case rates.

Variants: Omicron

- The Omicron variant has once again changed the game.
  - Maryland hit a peak of over 12,000 new cases reported daily in mid-January.
  - Since then, cases have trended downward in MD and in the U.S. as a whole.
- Most experts are predicting a milder impact of COVID-19 in spring and summer for 2022 due to increased immunity in the general population.
  - Based on hotel performance, TSA data, and general media coverage, this variant does not seem to be deterring domestic travel.
  - With the positive outlook from experts, travel restrictions will likely be relaxed (as they were last year).

Alpha
September 2020

Delta
October 2020

Gamma
November 2020

Beta
May 2020

Omicron
November 2021

Recovery Outlook & Forecasts

Key Takeaways on Recovery Scenarios

- The future of travel in Maryland will be tied to the overall economic recovery of the state, the nation, and Maryland's key origin markets. Key economic drivers used to project scenarios include State GDP, National GDP, key origin market GDP, net wealth, company profits, unemployment rates, and exchange rates.

  - In the **upside** scenario, tourism recovers to 2019 levels this year (2022). Compared to 2019, 2023 will see:
    - $1.84B more in visitor spending, $230M more in state and local taxes
    - 15,200 more tourism related jobs paying $670M more in wages
    - 10% gain in room revenue with RevPAR at $82.04
  - In the **baseline** scenario, tourism recovers to 2019 levels next year (2023). Compared to 2019, 2023 will see:
    - $700M more in visitor spending, $90M more in state and local taxes
    - 5,800 more tourism related jobs paying $250M more in wages
    - 4% gain in room revenue with RevPAR at $77.08
  - In the **downside** scenario, tourism recovers to 2019 levels after 2023. Compared to 2019, 2023 will see:
    - $580M less in visitor spending, $70M less in state and local taxes
    - 4,800 fewer jobs paying $210M less in wages
    - 3% loss in room revenue with RevPAR at $72.08

Three Future Recovery Scenarios

COVID-19 has been affecting lives and travel for over 3 years (as of May 2022).

While the U.S. and Maryland have recovered well so far, using some assumptions, it is possible to create three possible scenarios for continued recovery of the travel industry in Maryland.

The scenarios presented are strongly influenced by potential differences in national unemployment rate and GDP.

Scenario	Key Indicators†
Upside	• Low peak national unemployment rate • High national GDP
Baseline	• Low peak national unemployment rate • Moderate national GDP
Downside	• High peak national unemployment rate • Low national GDP

Source: Tourism Economics Symphony dashboard, State of Maryland + US Recovery Tracker
* All comparisons are made in reference to 2019 figures.
† See Appendix A for detailed description of scenario indicators and calculations

- **Upside Scenario:** recent declines are stabilized, and Maryland experiences a strong summer increase in demand in 2022.

- **Baseline Scenario:** recent declines ease, and Maryland experiences a moderate summer increase in demand in 2022.

- **Downside Scenario:** recent declines continue, and Maryland experiences a very limited summer increase in demand in 2022.

16

Scenario Overview

Upside Scenario
Compared to 2019, total tourism spending reaches $20.43B in 2023, a $1.84B gain.
15.2K jobs supported by tourism spending are gained.

Baseline Scenario
Compared to 2019, total tourism spending reaches $19.29B in 2023, a $700M gain.
5.8K jobs supported by tourism spending are gained.

Downside Scenario
Compared to 2019, total tourism spending reaches $18.01B in 2023, a $580M loss.
4.8K jobs supported by tourism spending are lost.

Predicted Recovery Scenarios (v. 2019)			
Jobs (Thousands)			
2019	**Future scenarios**	**2022**	**2023**
	Upside	228.67	241.62
226.43	Baseline	220.57	232.19
	Downside	209.99	221.66
Wages ($Billions)			
2019	**Future scenarios**	**2022**	**2023**
	Upside	$10.72	$11.29
$10.62	Baseline	$10.37	$10.88
	Downside	$9.90	$10.41
Visitor Spending ($Billions)			
2019	**Future scenarios**	**2022**	**2023**
	Upside	$18.86	$20.43
$18.59	Baseline	$17.88	$19.29
	Downside	$16.60	$18.01
State & Local Taxes ($Billions)			
2019	**Future scenarios**	**2022**	**2023**
	Upside	$2.61	$2.81
$2.58	Baseline	$2.49	$2.67
	Downside	$2.34	$2.51

Source: Tourism Economics Symphony dashboard, State of Maryland + US Recovery Tracker
* All comparisons are made in reference to 2019 figures.

Scenario Overview: Economic Indicators

Visitor Spending ($Billions)
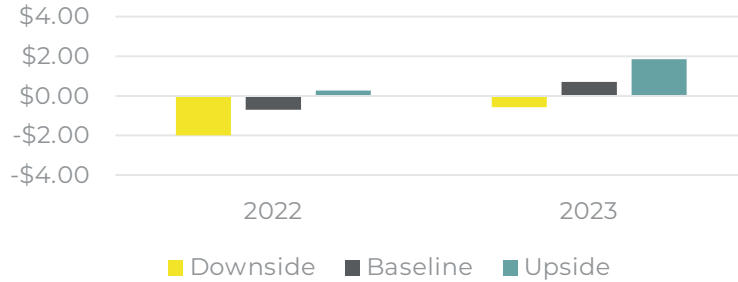
Jobs (Thousands)
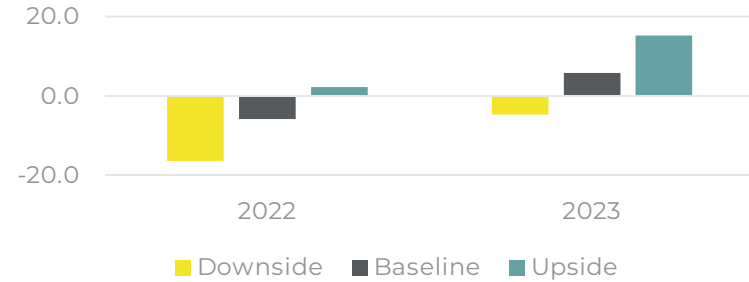
State and Local Taxes ($Billions)

Wages ($Billions)
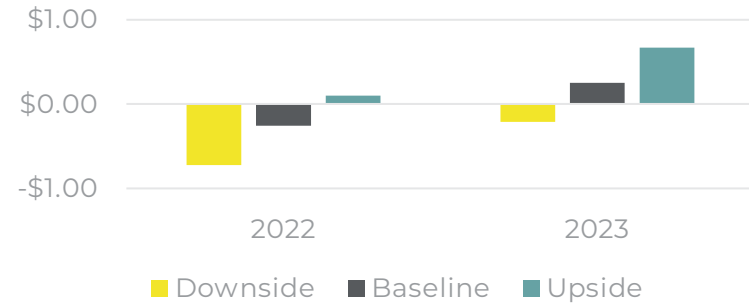
Scenario Overview: Hotel Performance

Demand (Past Projected vs. Actual)

ACTUAL, Jul-21, 1,698,117

ACTUAL, Jan-22, 977,177

Legend: Downside — Baseline — Upside — ACTUAL
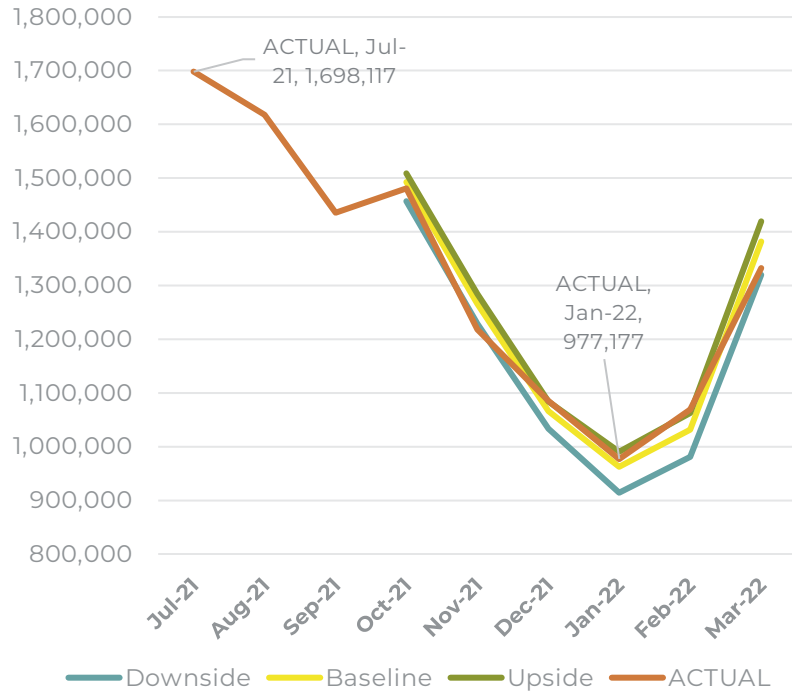
Demand (Projected Future)

Upside, Jul-22, 1,981,293

Downside, Jul-22, 1,848,141

Upside, Jul-23, 1,956,507

Downside, Jul-23, 1,823,355

Downside, Jan-23, 1,090,900

Upside, Jan-23, 1,169,959

Legend: Downside — Baseline — Upside

Source: Tourism Economics Symphony dashboard, State of Maryland + US Recovery Tracker
* All comparisons are made in reference to 2019 figures.

19
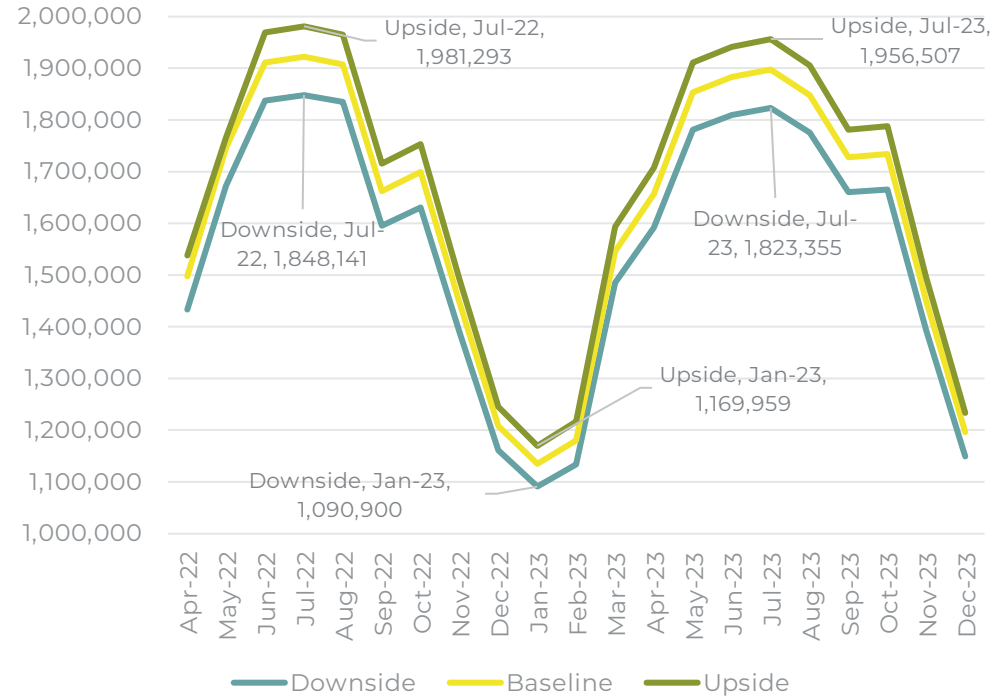
Scenario Overview: Hotel Performance

Revenue (Past Projected vs. Actual)

ACTUAL, Jul-21, $253,541,370

ACTUAL, Jan-22, $94,678,031

Downside — Baseline — Upside — ACTUAL
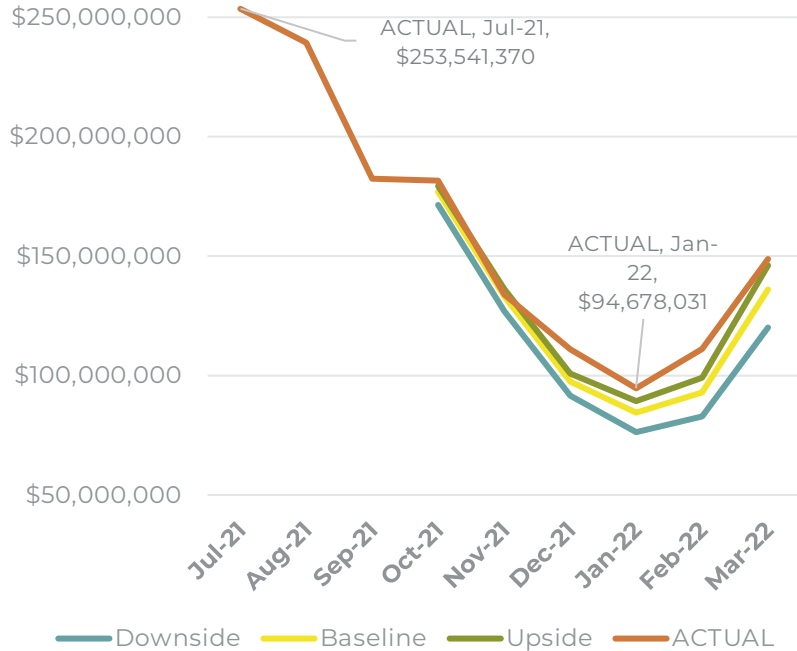
Revenue (Projected Future)

Upside, Jul-...

Upside, Jul-23, $285,349,743

Upside, Jan-23, $119,388,991

Downside, Jul-22, $234,569,6...

Downside, Jul-23, $234,068,918

Downside,...

Downside — Baseline — Upside

Source: Tourism Economics Symphony dashboard, State of Maryland + US Recovery Tracker
* All comparisons are made in reference to 2019 figures.
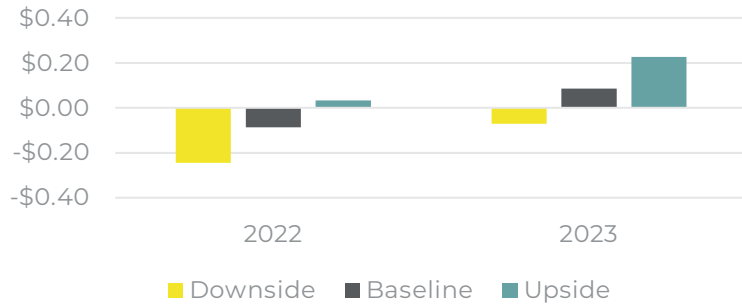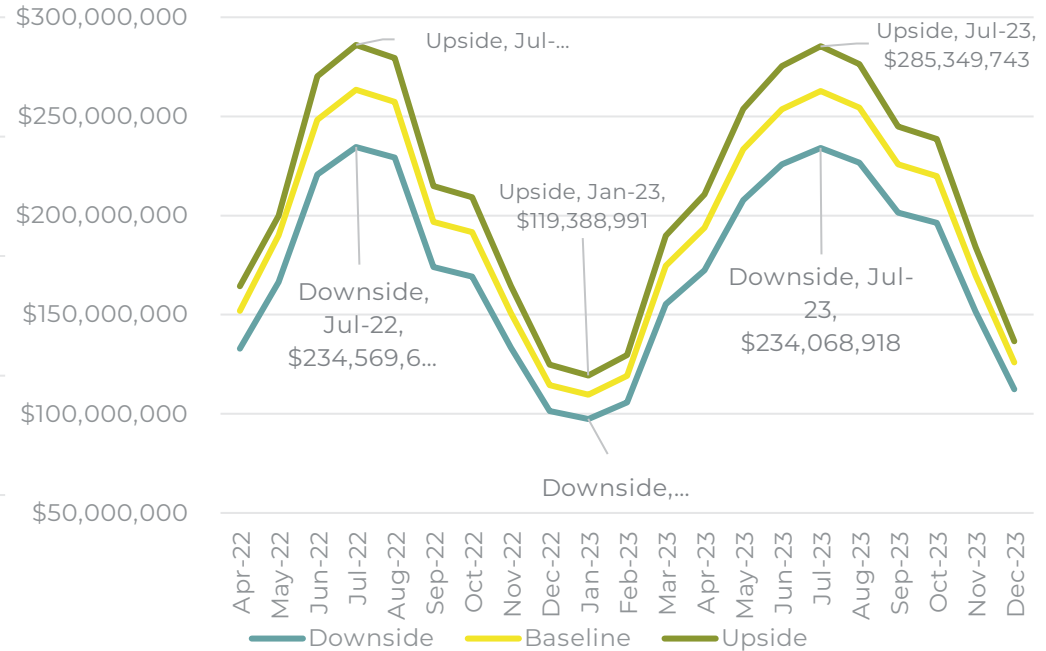
Upside: Economic Indicators

Upside Scenario	2021 (actual)	2022	2023
Jobs (Thousands)	**191.49**	**228.67**	**241.62**
Change in Jobs (v.2019)	-34.9	2.2	15.2
Wages ($Billions)	**$9.09**	**$10.72**	**$11.29**
Change in Wages (v.2019)	-$1.54	$0.10	$0.67
Visitor Spending ($Billions)	**$14.35**	**$18.86**	**$20.43**
Change in Visitor Spending (v.2019)	-$4.24	$0.27	$1.84
State and Local Taxes ($Billions)	**$2.06**	**$2.61**	**$2.81**
Change in Taxes (v.2019)	-$0.52	$0.03	$0.23

Source: Tourism Economics Symphony dashboard, State of Maryland + US Recovery Tracker

Upside: Hotel Performance

Upside change in Lodging Revenue (v. 2019)

	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
	-18.6%	-6.9%	7.2%	0.0%	6.8%	8.6%	10.8%	12.2%
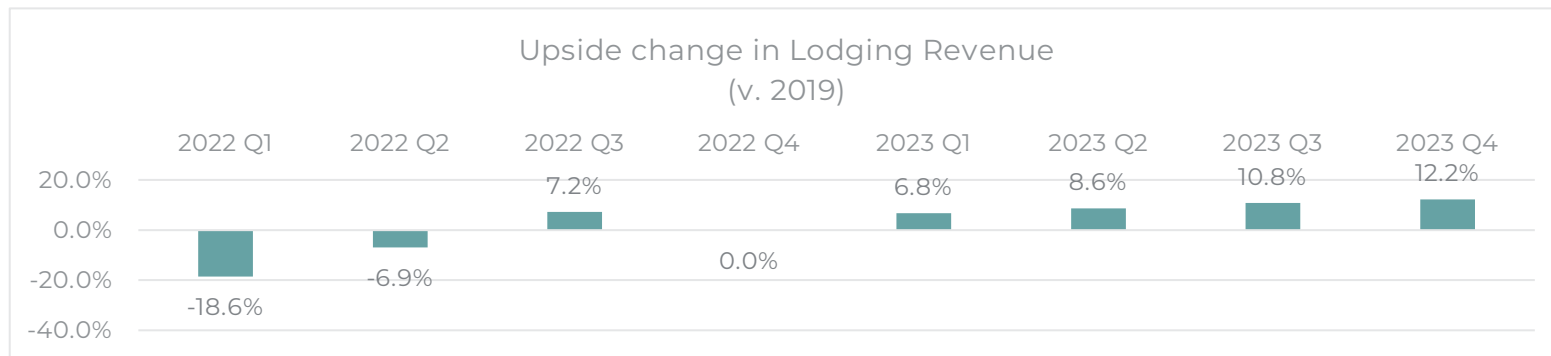
Upside	2019 (baseline)	2022	2023	Metric
Room Revenue ($)	**$2,319**	**$2,374**	**$2,562**	(Millions)
Room Revenue (gain/loss)	--	2%	10%	% difference from 2019
Room Demand (rooms)	**18,879.8**	**18,909.8**	**19,494.1**	(Thousands)
Room Demand (gain/loss)	--	0%	3%	% difference from 2019
Occupancy	64.2%	61.2%	62.8%	Room demand/room supply
ADR	$120.67	$121.38	$128.69	Average rate per room
RevPAR	$78.67	$76.28	$82.04	Revenue per available room

Baseline: Economic Indicators

Baseline Scenario	2021 (actual)	2022	2023
Jobs (Thousands)	**189.6**	**220.6**	**232.2**
Change in Jobs (v.2019)	-36.8	-5.9	5.8
Wages ($Billions)	**$9.01**	**$10.37**	**$10.88**
Change in Wages (v.2019)	-$1.62	-$0.26	$0.25
Visitor Spending ($Billions)	**$14.13**	**$17.88**	**$19.29**
Change in Visitor Spending (v.2019)	-$4.46	-$0.71	$0.70
State and Local Taxes ($Billions)	**$2.03**	**$2.49**	**$2.67**
Change in Taxes (v.2019)	-$0.55	-$0.09	$0.09

Source: Tourism Economics Symphony dashboard, State of Maryland + US Recovery Tracker

Baseline: Hotel Performance

Baseline change in Lodging Revenue (v. 2019)

	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
	-23.8%	-13.4%	-1.4%	-8.4%	-1.8%	-0.1%	2.0%	3.4%
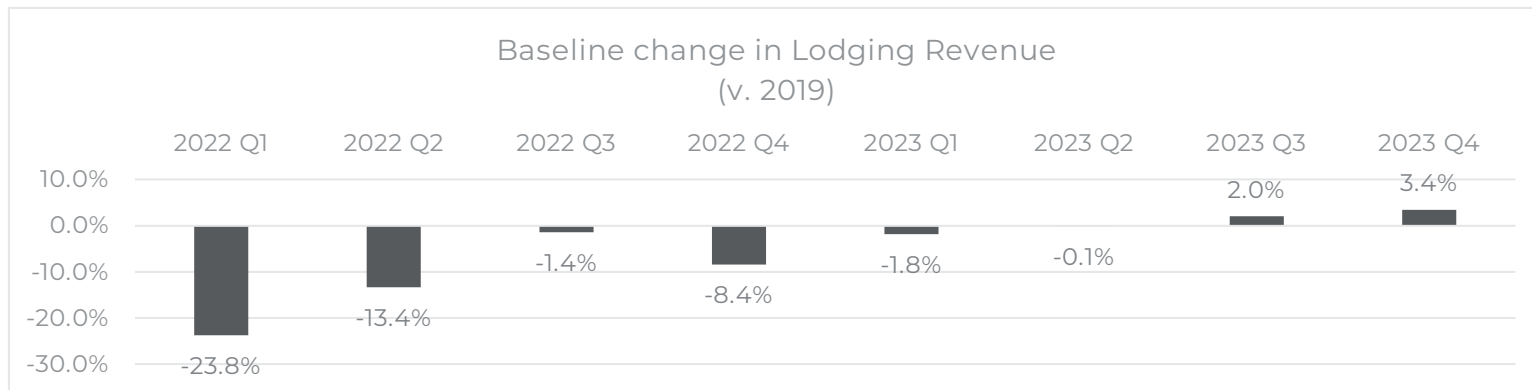
Baseline	2019 (baseline)	2022	2023	Metric
Room Revenue ($)	**$2,319**	**$2,248**	**$2,407**	(Millions)
Room Revenue (gain/loss)	--	-3%	4%	% difference from 2019
Room Demand (rooms)	**18,879.8**	**18,413.4**	**18,922.6**	(Thousands)
Room Demand (gain/loss)	--	-2%	0%	% difference from 2019
Occupancy	64.2%	59.7%	60.9%	Room demand/room supply
ADR	$120.67	$118.43	$124.55	Average rate per room
RevPAR	$78.67	$72.46	$77.08	Revenue per available room

Downside: Economic Indicators

Downside Scenario	2021 (actual)	2022	2023
Jobs (Thousands)	**187.81**	**209.99**	**221.66**
Change in Jobs (v.2019)	-38.6	-16.4	-4.8
Wages ($Billions)	**$8.92**	**$9.90**	**$10.41**
Change in Wages (v.2019)	-$1.70	-$0.72	-$0.21
Visitor Spending ($Billions)	**$13.90**	**$16.60**	**$18.01**
Change in Visitor Spending (v.2019)	-$4.69	-$1.99	-$0.58
State and Local Taxes ($Billions)	**$2.01**	**$2.34**	**$2.51**
Change in Taxes (v.2019)	-$0.57	-$0.24	-$0.07

Downside: Hotel Performance

Downside change in Lodging Revenue (v. 2019)

	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
	-32.0%	-23.7%	-12.4%	-19.0%	-12.7%	-11.1%	-9.0%	-7.7%
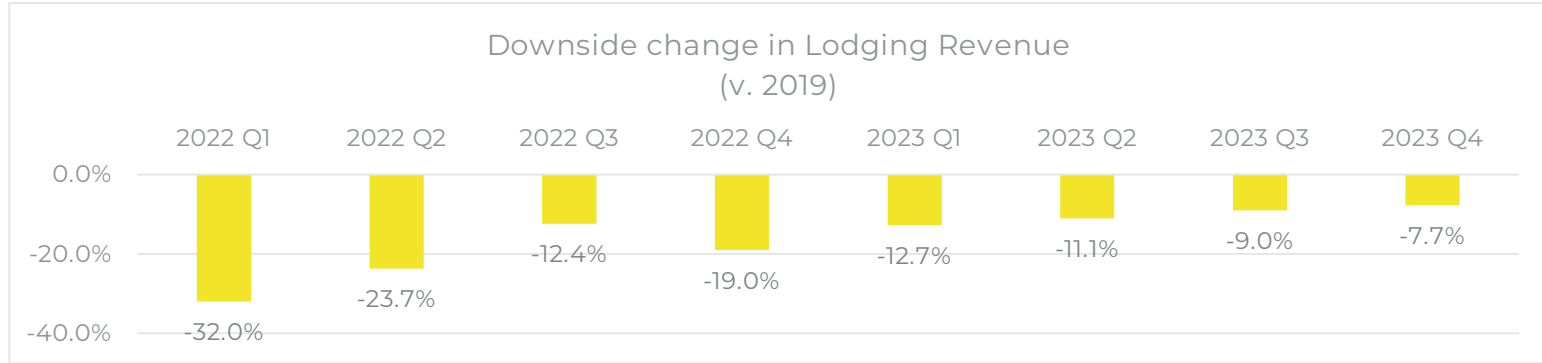
Downside	2019 (baseline)	2022	2023	Metric
Room Revenue ($)	**$2,319**	**$2,098**	**$2,251**	(Millions)
Room Revenue (gain/loss)	--	-10%	-3%	% difference from 2019
Room Demand (rooms)	**18,879.8**	**17.722.3**	**18,245.7**	(Thousands)
Room Demand (gain/loss)	--	-6%	-3%	% difference from 2019
Occupancy	64.2%	57.6%	58.8%	Room demand/room supply
ADR	$120.67	$115.14	$120.79	Average rate per room
RevPAR	$78.67	$67.89	$72.08	Revenue per available room

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.
Total sample size for both methodologies
1,050 (TIS) + 4,672 (ETS) = 5,722 respondents

Key Takeaways of the Visitor Voice

- In Maryland's top 8 feeder markets:
  - 40% would consider traveling to MD for leisure (consideration)
  - 27% are likely to visit MD for leisure and stay overnight within the next 2 years (intent)
  - 20% already have overnight leisure plans to visit or travel within MD (travel plans)

- Travelers tend to associate MD with seafood (73%), the Chesapeake Bay (57%), beaches (46%), waterfront towns (39%), and history/heritage (38%).

- The most commonly visited regions in the past were Central (54%), Lower Eastern Shore (49%), and Capital (48%). Those were also the regions with the most future intentions to visit.
  - If travelers intended to visit in the future but didn't yet have plans, they were likely to be aiming for the Lower Eastern Shore or the Western region.

- Those who already have plans to visit in the next 2 years will most likely be visiting for a family vacation (23%), to visit friends and/or family (17%), or for a couple's getaway (17%).

28

Voice of the Visitor: Methodologies

Travel Intent Survey (TIS) (n=1052)
This survey queried general population leisure travelers in target markets and was FUTURE TRAVEL oriented.

- Sample requirements for recruited panelists:
  - 150 from each Tier 1 market: Baltimore, DC, Pittsburgh, Philadelphia, NY (including southern Connecticut), 100 from each Tier 2 market: Cleveland, Cincinnati, Columbus
  - **Leisure travelers were qualified by the following criteria:**
    - Traveled for leisure between 2019 and 2021 at least once staying overnight in paid accommodations at least 50 miles away from their home.
    - Likely to take a trip for leisure within the next 2 years within the U.S. but outside their home state staying overnight in paid accommodations.
  - Between 25 and 72 years old
  - At least $50,000 household income
  - Representative mix of ethnicities and genders
  - Fielded October 2021

- *Note: We will refer to the TIS sample as "random leisure travelers" or "respondents." When we are specifically referring to those who have visited Maryland, we will refer to them as "visitors."*

Voice of the Visitor: Methodologies

Engaged Traveler Survey (ETS) (n=4,672)
This survey queried past travelers who have engaged with Maryland DMOs and was PAST TRAVEL oriented.
- Not all travelers queried had visited, but the vast majority had.

- Distributed by OTD, and 23 out of 26 DMO partners to visitors via email lists and social media.
- Overall results were WEIGHTED by visitor volume per county in 2019, since a disproportionate number of responses came from Ocean City.

- *Note: we refer to those in this sample as an "engaged audience" or "engaged traveler" generally. If we are specifically referring to those who have visited Maryland, we will call those people "engaged visitors."*

Reference: Legend & Terminology

Legend

- In this section, some tables include annotations like those pictured above. They indicate "statistical significance" (that the number has a meaningful difference from other values it's compared to).
  - Red text with a down arrow tell us that the number is statistically significantly lower than the other values.
  - Blue text with a up arrow tells us that the number is statistically significantly higher than other values.
- Note that statistical significance is impacted by sample size.

Terminology

- **Consideration**
  - If a destination is being "considered," it is on a list (actual or metaphorical) as a *potential* travel destination.
- **Likelihood/Intent to travel**
  - If a traveler has expressed a "likelihood" of or an intent to travel to a specific destination, they have decided that they are likely to select that destination for a trip within a given timeframe (e.g., in the next 2 years).
- **Travel plans**
  - If a traveler has "travel plans" they have committed to visiting a specific destination at a specific time. This does not necessarily equate to any one purchase, but rather a series of decisions that will turn that traveler into a visitor.

Map of Maryland

Legend:
- Western Maryland
- Capital Region
- Southern Maryland
- Central Maryland
- Upper Eastern Shore
- Mid-Shore
- Lower Eastern Shore
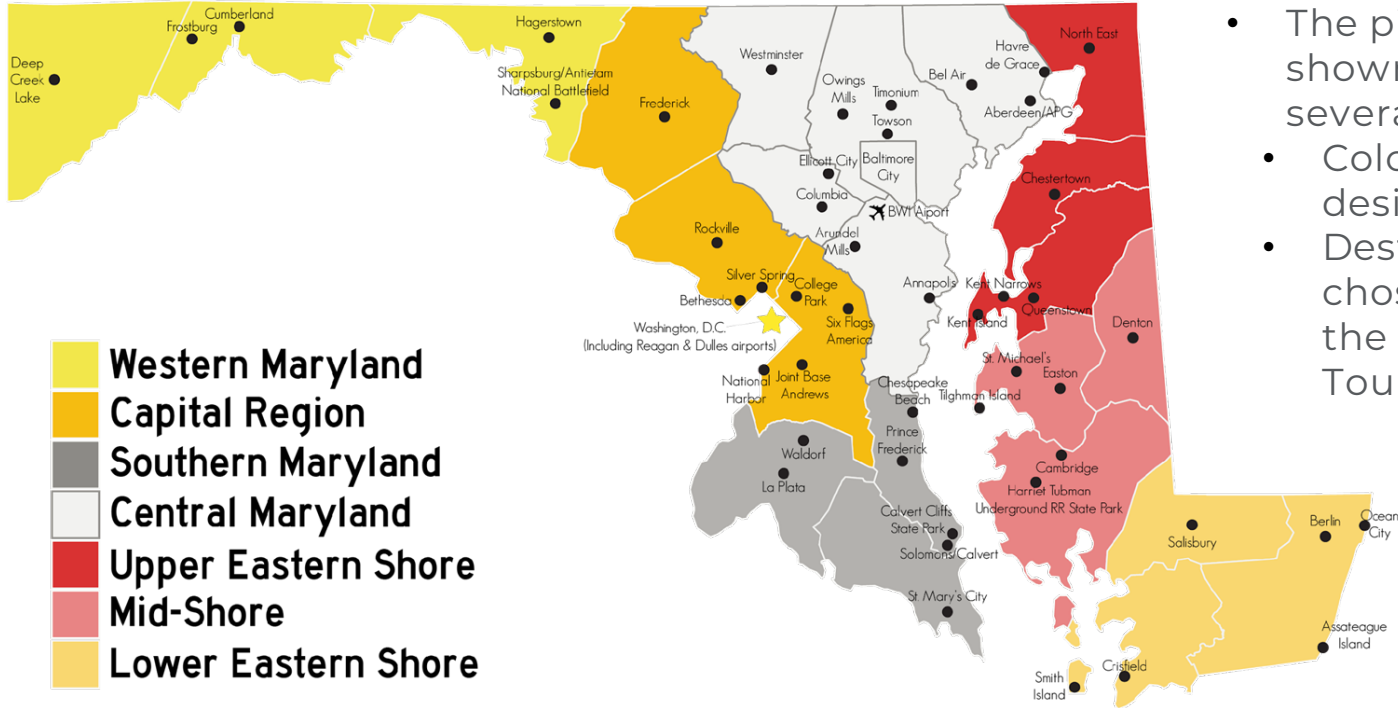
- The pictured map was shown to respondents for several questions.
  - Colors and font were designed to be accessible.
  - Destinations/cities were chosen with input from the Maryland Office of Tourism.

Travel Intent Survey Audience

This survey audience represents the perspectives of the general traveling public (1,052 respondents)*

	Count
Baltimore	150
Pittsburgh	150
Philadelphia	150
Washington DC	150
Columbus	101
Cleveland	100
New York	150
Cincinnati	101

Market SUMMARY
sample size = 1052; 95% confidence level

Gender

Man, 43%
Woman, 56%

Generations

- Boomers: 35%
- Gen X: 32%
- Millennials: 33%

Race/Ethnicity

- Caucasian/white: 73%
- African-American/Black: 13%
- Asian: 12%
- Hispanic/Latinx: 4%
- Prefer not to answer: 0%
- Other: 2%
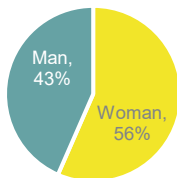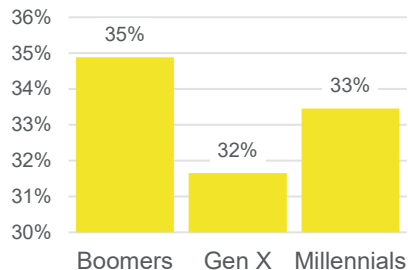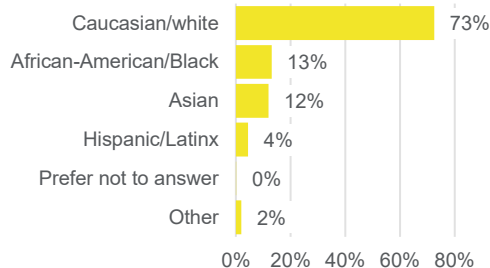
* Respondents had to have taken at least one trip for leisure where they stayed overnight in a paid accommodation in 2019, 2020, or 2021.
* Respondents had to be at least somewhat likely to take a trip for leisure within the U.S. (but outside their home state) where they stayed at least one night in a paid accommodation.

Income

- $50,000 - $59,999: 1%
- $60,000 - $75,999: 21%
- $76,000 - $99,999: 22%
- $100,000 - $124,999: 17%
- $125,000 - $149,999: 13%
- $150,000 - $199,999: 15%
- $200,000 or more: 11%

Kids at Home

No, 58%
Yes, 42%

Kids' Ages

- 0-3 years old: 25%
- 4-7 years old: 33%
- 8-12 years old: 53%
- 13-18 years old: 43%

Family Status

- Married: 73%
- Unmarried with partner: 10%
- Unmarried and single: 9%
- Divorced: 5%
- Widowed: 2%
- Other: 0%
- Prefer not to answer: 0%

Source: Travel Intent Survey (random leisure travelers)

33
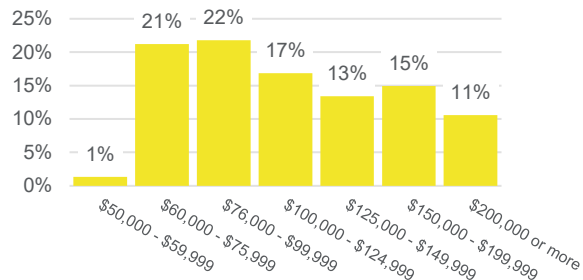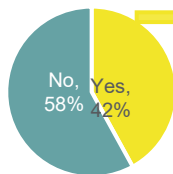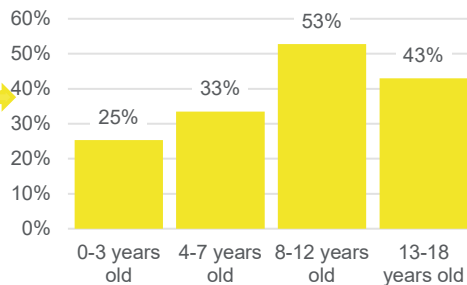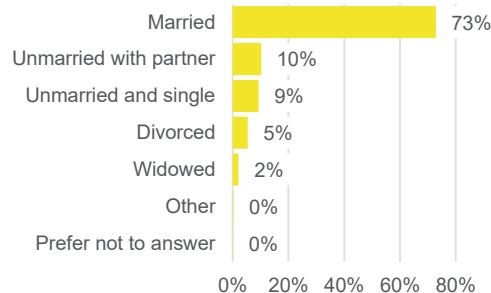
Engaged Traveler Survey Audience

This survey audience represents the perspectives of the travelers that interact or "engage" with Maryland Destination Marketing Organizations (DMOs) (4,672 respondents).

Race/Ethnicity

- Caucasian/white: 74%
- African-American/Black: 9%
- Prefer not to answer: 4%
- Hispanic/Latinx: 6%
- Asian: 8%
- Other: 2%

Gender

- Woman, 63%
- Man, 35%
- Prefer not to answer, 2%

Generations

- Gen Z: 10%
- Millennials: 31%
- Gen X: 24%
- Boomers: 35%

Income

- Less than $30,000: 4%
- $30,000 - $59,999: 13%
- $60,000 - $75,999: 19%
- $76,000 - $99,999: 15%
- $100,000 - $124,999: 12%
- $125,000 - $149,999: 8%
- $150,000 - $199,999: 8%
- $200,000 or more: 8%
- Prefer not to answer: 14%

Family Status

- Married: 58%
- Unmarried and single: 15%
- Unmarried with partner, cohabitating: 10%
- Divorced: 6%
- Widowed: 4%
- Prefer not to answer: 3%
- Unmarried with partner, living separately: 3%
- Other: 1%

Kids at Home

- No: 71%
- Yes: 29%

Kids' Ages

- 0-3 years old: 21%
- 4-7 years old: 44%
- 8-12 years old: 32%
- 13-18 years old: 24%

Source: Engaged Traveler Survey (travelers responding via DMO)

34

Engaged Traveler Survey: Weighting

This survey audience represents the perspectives of the travelers that interact or "engage" with Maryland Destination Marketing Organizations (DMOs) and MD OTD (4,672 respondents).

> Visitor volume data from Tourism Economics shows the following breakdown of visitors by region in 2019.

> The raw results over-represent the Lower Eastern Shore Region (Ocean City) and under-represent the Central and Capital Regions.

> Therefore, aggregated results are weighted by region to better represent "normal" visitation patterns. CAUTION: results for the Central, Capital, and Upper Shore regions are LESS reliable due to small sample sizes.

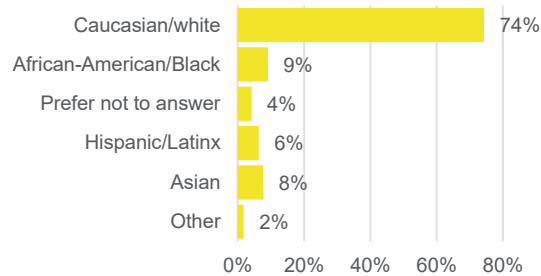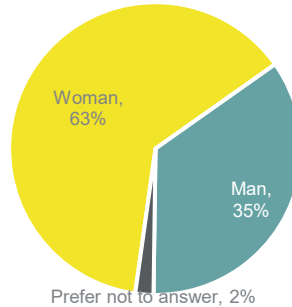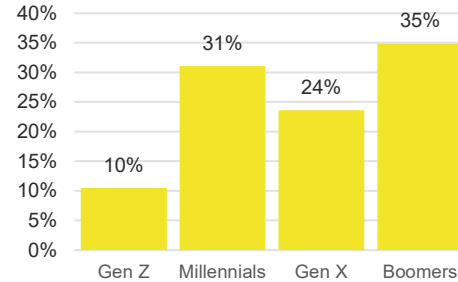| Region	2019 Total Visitors by Region	% of Total Maryland Visitors
Western	3,057,041	5%
Central	26,966,838	46%
Capital	19,817,851	34%
Southern	2,595,881	4%
Upper Eastern Shore	1,779,754	3%
Midshore	1,066,454	2%
Lower Eastern Shore	3,778,946	6%

	%
MD OTD	6%
Western DMOs	6%
Central DMOs	9%
Capital DMOs	10%
Southern DMOs	6%
Upper Shore DMOs	3%
Midshore DMOs	3%
Lower Shore DMOs	57%

DMO Source by Region
sample size = 4672

	Applied Weight	Raw Count	Weighted Count
Western	5%	299	234
Central	46%	387	2,149
Capital	34%	241	1,588
Southern	4%	112	187
Upper Shore	3%	66	140
Midshore	2%	116	93
Lower Shore	6%	1,700	280
Total	100%	4,672	2,585

Most Recently Visited Region
Weight: 2019 Visitors by Region Weight; sample size = 2921; total sample size = 4672; 1751 missing; effective sample size = 2585 (89%); 95% confidence level

Maryland Tourism Economic Impact Study (visitor volume), Tourism Economics, 2020
Source: Engaged Traveler Survey (travelers responding via DMO)

Travel Intent

Recovery from the Travelers' Perspective

	Disagree	Neither agree nor disagree	Agree
It is important to have COVID-19 information and resources on a destination I am considering	12%	14%	75%
It is important to me to be able to social distance when traveling right now	14%	16%	70%
For the next 6 months, the COVID-19 caseload/growth rate of a place will have an influence on my destination choice	17%	13%	70%
For the next 6 months, the masking policy of a place will have an influence on my destination choice	16%	19%	66%
For the next 6 months, the vaccination rate of a place will have an influence on my destination choice	20%	20%	61%
I am back to traveling as usual before the COVID-19 pandemic	35%	13%	53%
I am hesitant to travel right now	34%	14%	52%

In October of 2021…
- 75% of Travel Intent Survey (TIS) respondents agreed that it is important to have COVID-19 information and resources on a destination they are considering.
- 70% agreed that social distancing is important while traveling.
- 70% believed caseloads will influence their destination choice.
- 66% agreed that masking policies will influence their destination choice.
- 61% agreed that vaccination rates will influence their destination choice.
- About half were back to traveling as usual, and another half were hesitant to travel at the time.

Note: survey was fielded October 2021.

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

Q: The COVID-19 pandemic has obviously had a large impact on travelers' decisions. With regards to COVID-19 and traveling, to what extent do you agree with the following statements

37

Recovery from the Travelers' Perspective

Average		Back to traveling as usual	Hesitant to travel
Generations	Boomers	2.9 ▼	3.1
	Gen X	3.3	3.1
	Millennials	3.6 ▲	3.4 ▲
Children at home	DOES have kids under 18 at home	3.7 ▲	3.3
	Does NOT have kids under 18 at home	3.0 ▼	3.2
Visitor Status	Non-visitor	3.4 ▲	3.3
	Past visitor	3.1 ▼	3.1
Market	Baltimore	3.3	3.1
	Pittsburgh	3.1	3.1
	Philadelphia	3.2	3.2
	Washington DC	3.2	3.4
	Columbus	3.2	3.3
	Cleveland	3.3	3.2
	New York	3.3	3.5 ▲
	Cincinnati	3.5 ▲	2.9 ▼

Source: Travel Intent Survey (random leisure travelers)

- Boomers, those without kids at home, and past visitors to MD are less likely to be back to traveling as usual.

- Parents with kids at home and Non-visitors to MD are more likely to be traveling as usual.

- Millennials seem to be split on the issue, with some reporting they are back to traveling as usual and some reporting they are hesitant to travel.

- New Yorkers are more hesitant to travel right now, and Cincinnatians are less hesitant.

Measuring Travel Intent

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

Interest — The number of people who are <u>interested</u> in a destination or find it <u>enticing</u> in general.

Consideration — The number of people who would <u>consider</u> traveling to a destination.

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

Travel Plans — The number of people who already have <u>plans</u> to visit a destination and stay overnight in paid accommodations.

For clarification on terminology, you can click <u>here</u>.

Measuring Travel Intent

Awareness

100% are aware of Maryland (1,052/1,052)

Interest

62% find Maryland to be an enticing place to visit (649/1,052)

Consideration

40% would consider traveling to MD for leisure at some point in the future (421/1,052)

Intent

27% are likely to visit MD for leisure and stay overnight within the next 2 years (289/1,052)

Travel Plans

20% have plans to visit MD for leisure and stay overnight within the next 2 years (207/1,052)

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)

Average Score: 3.6
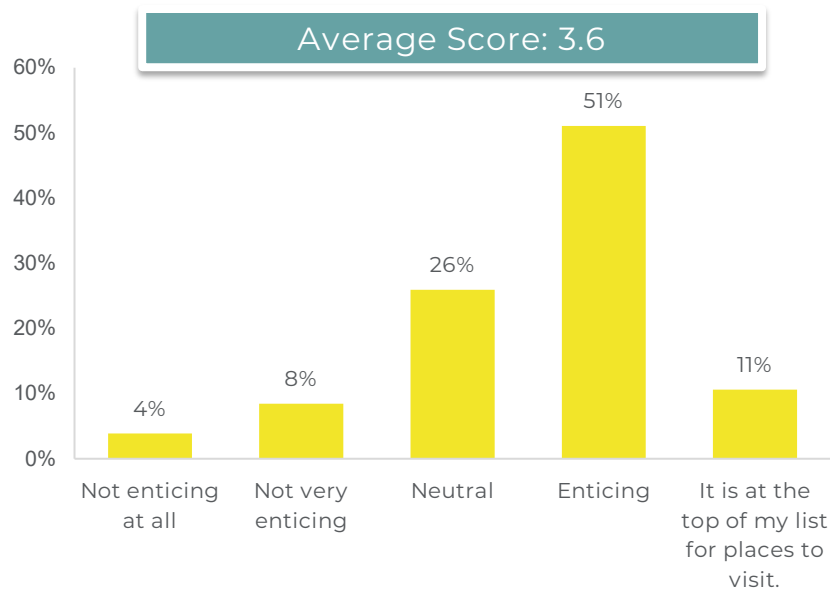
		MD Enticement Score
Market	Baltimore	3.7
	Pittsburgh	3.5
	Philadelphia	3.7
	Washington DC	3.6
	Columbus	3.4
	Cleveland	3.4 ▼
	New York	3.7 ▲
	Cincinnati	3.3 ▼
Children at home	DOES have kids under 18 at home	3.8 ▲
	Does NOT have kids under 18 at home	3.4 ▼
Generations	Boomers	3.4 ▼
	Gen X	3.5
	Millennials	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
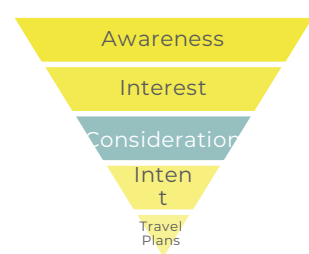
	Have visited	Would consider visiting
Delaware	24% ▼	32% ▼
District of Columbia	38%	36% ▼
Florida	70% ▲	69% ▲
Maine	23% ▼	45%
Massachusetts	30% ▼	42%
Maryland	**44% ▲**	**40%**
New Jersey	42%	37% ▼
New York	62% ▲	54% ▲
North Carolina	42%	51% ▲
Pennsylvania	55% ▲	44%
South Carolina	40%	50% ▲
Virginia	45% ▲	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.

Awareness
Interest
Consideration
Intent
Travel Plans

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.

43

Likelihood to Visit/Intent

Awareness
Interest
Consideration
Intent
Travel Plans
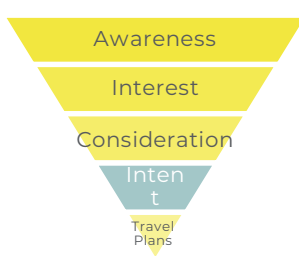
Likelihood to visit overnight for leisure within 2 years

	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.

44

Differences in Intent to Visit
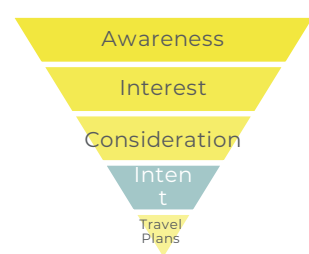
Future Intent to Visit		Not likely visit MD	Likely to visit MD
Market	Baltimore	55% ▼	45% ▲
	Pittsburgh	71%	29%
	Philadelphia	69%	31%
	Washington DC	63% ▼	37% ▲
	Columbus	81% ▲	19% ▼
	Cleveland	89% ▲	11% ▼
	New York	81% ▲	19% ▼
	Cincinnati	83% ▲	17% ▼
Generations	Boomers	75%	25%
	Gen X	71%	29%
	Millennials	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 <u>next two years</u>?

45

Deterrents for Future Visitation

Chart — "What is deterring you from considering a Maryland overnight leisure trip?":

- I am hesitant to travel anywhere right now in light of the COVID-19…: 37%
- I don't know enough about Maryland.: 17%
- Personal financial reasons.: 15%
- Maryland does not offer what I need in a travel experience.: 13%
- There is not enough to do in Maryland.: 13%
- Maryland is not exciting.: 13%
- Not enough personal vacation time.: 11%
- Maryland is too far from home.: 8%
- I don't feel that Maryland is safe.: 6%
- Maryland is too difficult to get to.: 4%
- Other: 14%

- 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.

46

Educational 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.
- They are typically non-past visitors to MD, white, Gen X, 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.

Motivators for Future Visitation

Increasing consideration

Motivator	%
Availability of package deals and discounts for hotels and attractions.	42%
Recommendations from friends and family	35%
Seeing that they had lower COVID-19 positive case numbers	31%
Seeing positive ratings and reviews	26%
Seeing that they had higher vaccination rates	25%
Seeing that they offered something in my specific area of interest	11%
Other	9%
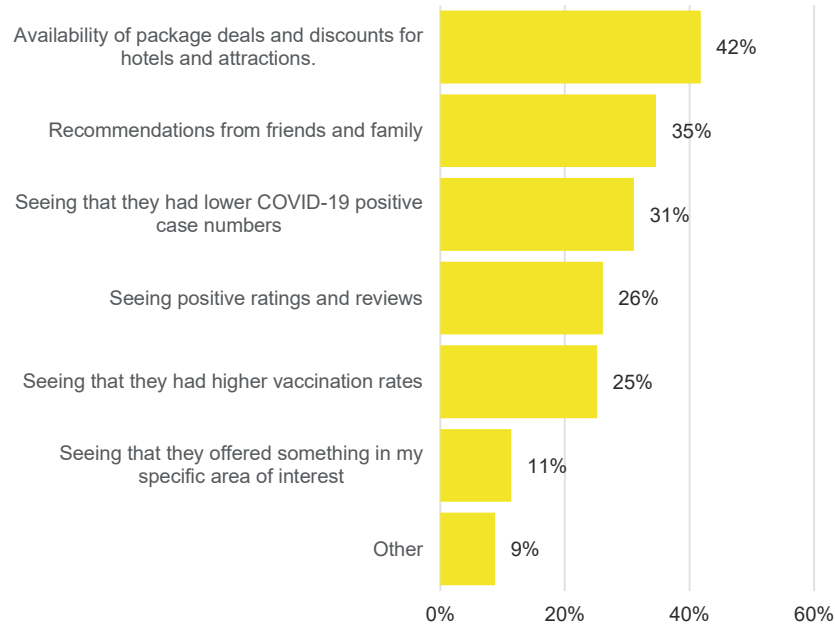
MD aspects that would motivate travel if they knew more about it

Aspect	%
Local seafood	48%
Walkable, waterfront towns	46%
Abundant coastline, beaches, and wide range of freshwater and salt-water based activities	40%
Museums and historical sites	34%
Unique scenic drives	33%
A variety of outdoor activities	33%
Unique cultural history and heritage	29%
Local breweries, distilleries and/or wineries	27%
A diverse culinary scene	25%
Music festivals	22%
Fun theme parks and family-friendly activities	20%
One-of-a-kind shopping experiences	18%
Access to professional sports	10%
Other	4%

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.

48

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%).

Category	%
Seafood/Crabs	73%
Chesapeake Bay	57%
Beaches	46%
Waterfront towns	39%
History & heritage	38%
Outdoor recreation	33%
Great food/culinary scene	29%
Affordable	29%
Water activities	28%
Varied landscapes	26%
Easy to get around	26%
Professional sports	24%
There is a lot to see and do	24%
Unique experiences	20%
Mountains	20%
Arts & culture	20%
Farms and agriculture	12%
Great healthcare	11%
TV shows/film	9%
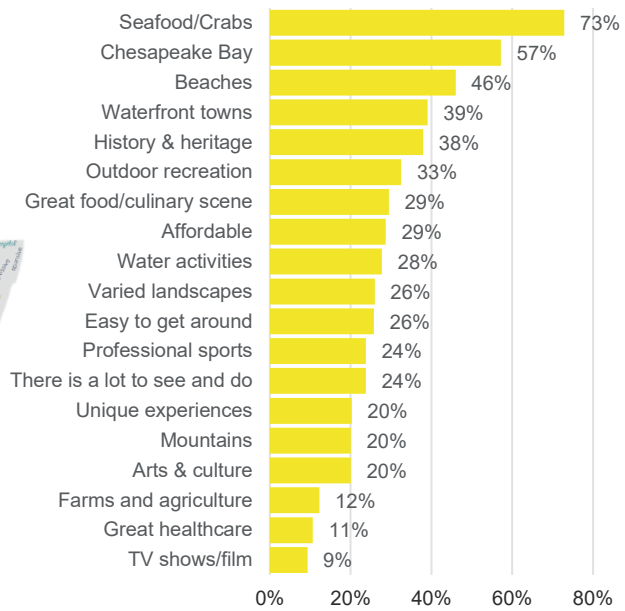
Source: Travel Intent Survey (random leisure travelers, all)

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

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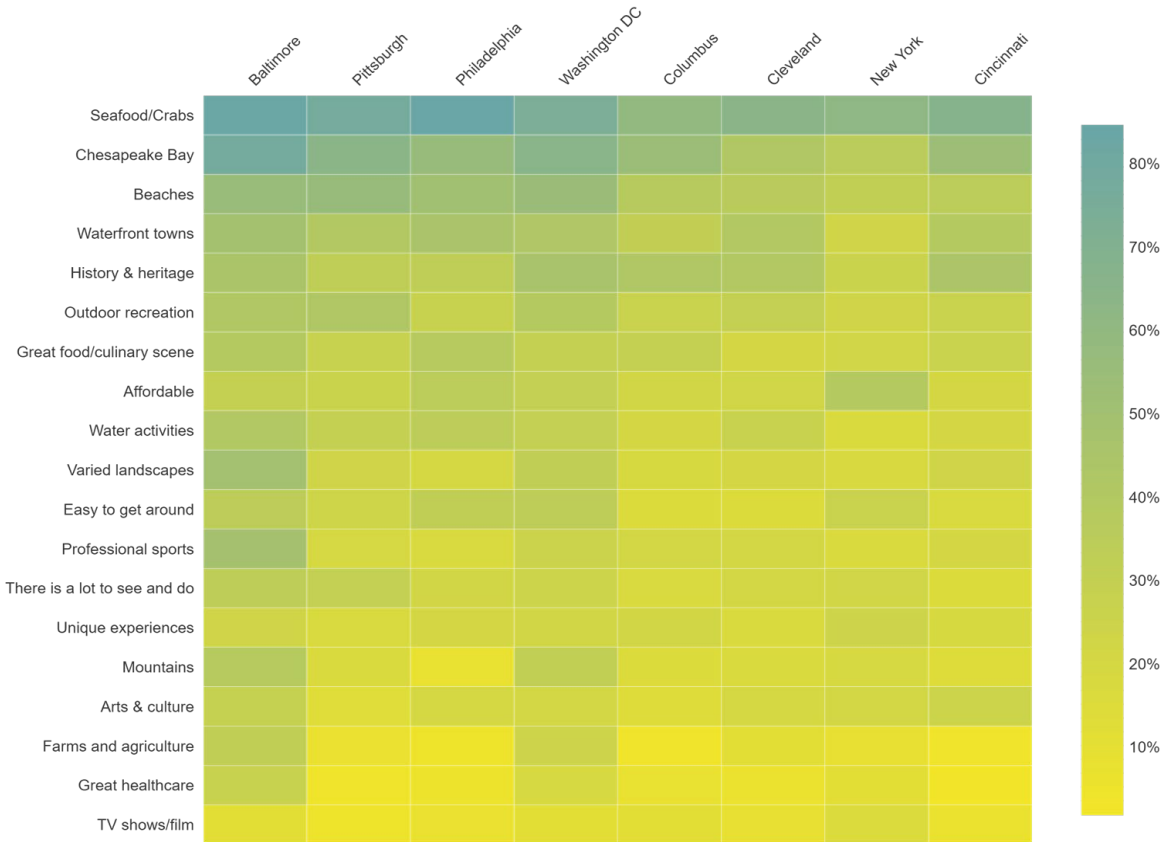
In our survey, we asked respondents to select from a given list of attributes any/all the things that come to mind when they think of the state of Maryland. The graph here represents the level of perception or association of the attribute per market surveyed. The darker the color means the stronger the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

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.

52

Visitor Behaviors: Past & Future

Past Visitation to Maryland (TIS)

Past visitor, 44%
Non-visitor, 56%
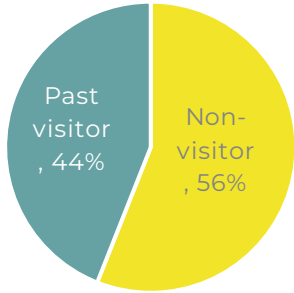
- 44% of respondents have traveled for leisure in Maryland in the past.
  - Maryland residents have made more overnight leisure trips than those that live out of state--nearly a third have made 10 or more trips.
  - Half of out of state residents have made 1-2 overnight leisure trips to Maryland.
  - Visitors were most likely to visit the Central Region (54%), the Lower Eastern Shore (49%) and the Capital Region (48%).

of past overnight leisure trips to MD

to MD from out of state   in MD by residents

Regions visited

Region	%
Central	54%
Lower Eastern Shore	49%
Capital	48%
Western	34%
Midshore	24%
Southern	18%
Upper Eastern Shore	18%

54

Statewide Past Visitors (DMO Engaged Audience)

Net promoter score

23.8

-100   100

(% Promoters - % Detractors)

Avg# of past trips

6.1

Overnight stay?

Yes
86%

No
14%

Avg # of nights stayed

2.9

Month of most recent visit

Month	%
January	3%
February	4%
March	5%
April	8%
May	10%
June	13%
July	10%
August	11%
September	15%
October	14%
November	6%
December	2%

Lodging for most recent vist

Lodging	%
Hotel	47%
Friend/family home	22%
Airbnb, vrbo, or similar	15%
Motel	13%
Vacation home rental	9%
Bed and Breakfast	9%
Resort	6%
Cabin, lodge or cottage	6%
Campground	5%
Other	2%

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:

Purpose	%
Visit friends and/or family	17%
Couples getaway	13%
Family vacation	10%
Outdoor recreation	8%
Wedding, reunion, or other family event	8%
Shopping	5%
Festival or event	5%
Passing through as part of a longer trip	5%
Visit an attraction	5%
Professional or college sports	4%
Multi-generational family trip	4%
Medical treatment	4%
Youth sports (including tournaments)	2%
Casino/gambling	2%
Other	9%

They traveled with:

	%
Partner/spouse	55%
Friends	20%
Adult children	17%
Children under 18	14%
Other family members	11%
Parents/In-laws	9%
Colleagues	4%
Other	8%

Avg party size

3.3

Avg per trip spending

$1,125

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

NPS score, Most Recent Trip (y-axis)
Spending, Most Recent Trip ($ x1,000) (x-axis)
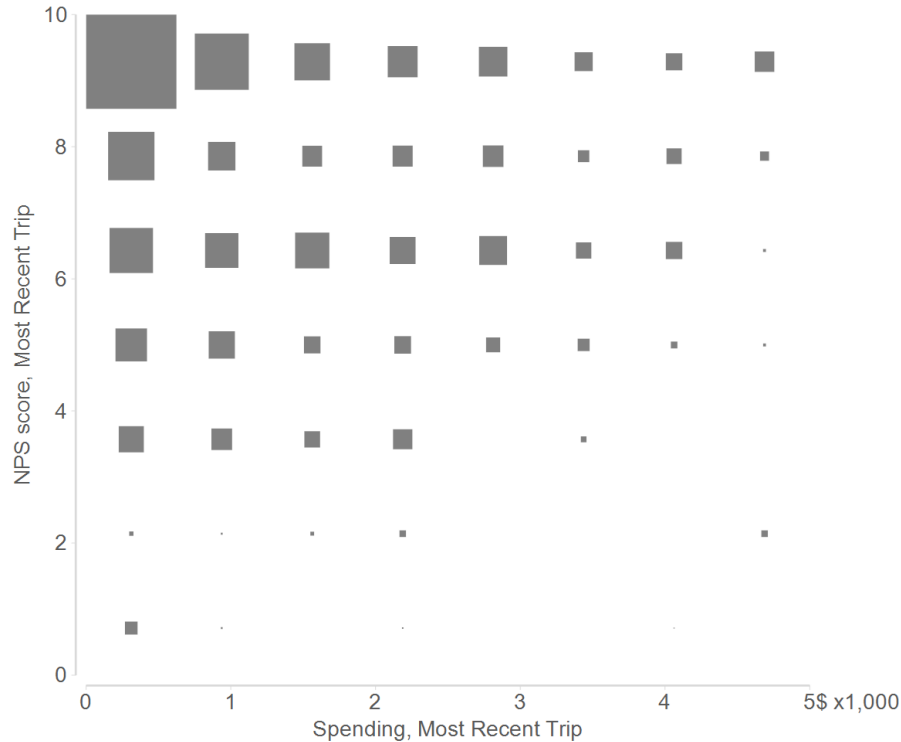
- Spending and NPS scores have a NEGATIVE correlation – for the most part, the **less travelers spend per trip the more likely they are to recommend traveling to MD to others.**

- 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

Has plans w/in 1 year, 17%
Has plans w/in 2 years, 2%
Likely to visit MD, 27%
No plans, 8%
Not likely to visit MD, 73%
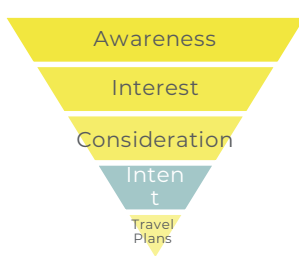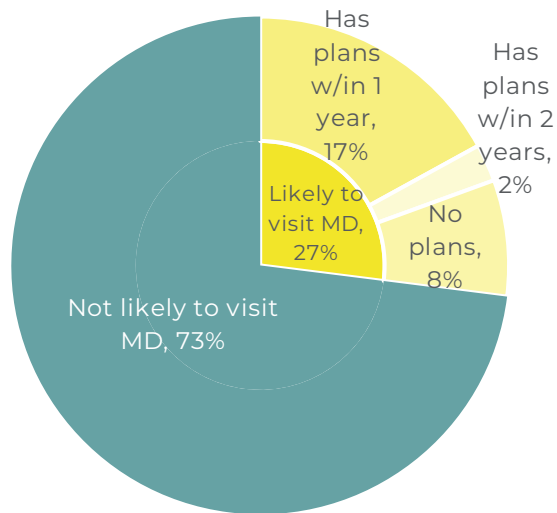
	Men	Woman	Millennials	Gen X	Boomers	n=
Yes, within the next year	75% ▲	54% ▼	75% ▲	70%	43% ▼	182
Yes, within the next 2 years	7%	10%	9%	6%	11%	25
No plans currently	18% ▼	36% ▲	16% ▼	24%	46% ▲	82

- 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)

60

Future Travel: Information Sources

Information Sources

Source	Without Plans (n=82)	With Plans (n=207)
Prior knowledge	63%	53%
Friends/family recommendations	60%	44%
Trip review sites (e.g., Tripadvisor, Yelp, Google, etc.)	26%	33%
Internet search	34%	32%
Social media	10%	22%
Travel deal sites	12%	21%
Visitor guides/brochures	21%	17%
State tourism website (Visitmaryland.org)	17%	16%
Newspaper/magazine story	7%	13%
State welcome center	1%	11%
Travel blog	4%	11%
Destination Maryland Magazine	1%	10%
Conference/meeting/office/event provided	7%	8%
Other	5%	4%
None of these	2%	2%

■ Without Plans (n=82)   ■ With Plans (n=207)

- 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.

61

Future Travel: Information Sources

	Children at home		Market					
	DOES have kids under 18 at home	Does NOT have kids under 18 at home	Baltimore	Pittsburgh	Philadelphia	Washington DC	New York	Cincinnati
Prior knowledge	39% ▼	67% ▲	57%	70% ▲	66%	55%	43%	29% ▼
Friends/family recommendations	41% ▼	54% ▲	43%	64% ▲	64% ▲	38%	43%	29%
Internet search	33%	33%	39%	32%	34%	32%	25%	29%
Trip review sites (e.g., Tripadvisor, Yelp, Google, etc.)	37%	27%	30%	23%	36%	34%	32%	29%
Social media	28% ▲	12% ▼	18%	20%	19%	18%	18%	18%
Visitor guides/brochures	17%	20%	12%	20%	15%	29% ▲	14%	18%
Travel deal sites	22%	16%	19%	9%	21%	20%	18%	24%
State tourism website (Visitmaryland.org)	19%	15%	18%	14%	21%	18%	11%	6%
Newspaper/magazine story	15%	8%	9%	7%	6%	20% ▲	25% ▲	6%
Travel blog	17% ▲	4% ▼	7%	5%	13%	9%	18%	0%
State welcome center	13% ▲	5% ▼	10%	2%	4%	13%	11%	12%
Destination Maryland Magazine	13% ▲	4% ▼	6%	0% ▼	9%	14% ▲	11%	12%
Conference/meeting/office/event provided	8%	7%	6%	2%	6%	9%	11%	18%
None of these	3%	2%	4%	0%	0%	0%	4%	6%
Other	4%	4%	12% ▲	2%	0%	5%	0%	0%

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.

Awareness
Interest
Consideration
Intent
Travel Plans

- Those who do NOT have kids at home and those from Pittsburgh and Philadelphia are more likely to use knowledge and recommendations as resources.
- Visitors with kids at home are more likely to use social media, travel blogs, state welcome centers, and Destination Maryland Magazine.
- Visitors from Washington D.C. are more likely to use visitors guides/brochures, newspaper/magazine stories and Destination Maryland Magazine.
- Visitors from New York are most likely to use a newspaper/magazine story.

Future Travel: Destinations

Regions

Region	With Plans	Without Plans
Central	47%	46%
Lower Eastern Shore	42%	59%
Capital	33%	30%
Southern	17%	18%
Midshore	14%	15%
Upper Eastern Shore	12%	9%
Western	12%	35%

With Plans (n=207) Without Plans (n=82)
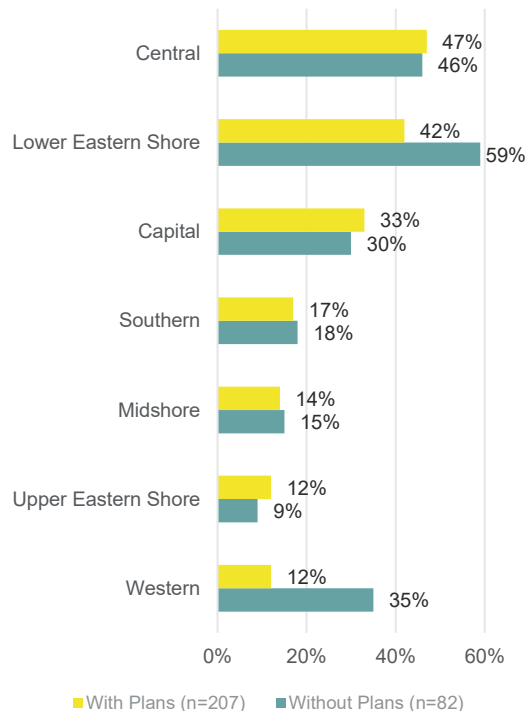
Travel Intent by Destination
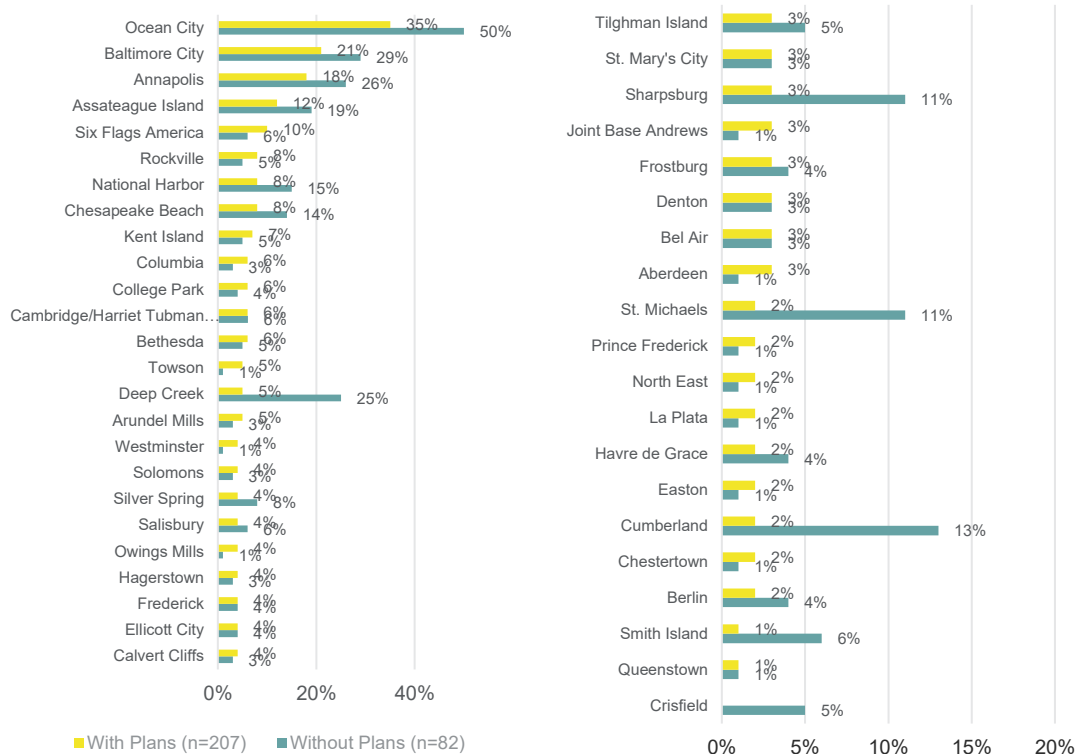
Destination	With Plans	Without Plans
Ocean City	35%	50%
Baltimore City	21%	29%
Annapolis	18%	26%
Assateague Island	12%	19%
Six Flags America	6%	10%
Rockville	5%	8%
National Harbor	8%	15%
Chesapeake Beach	8%	14%
Kent Island	5%	7%
Columbia	3%	6%
College Park	4%	6%
Cambridge/Harriet Tubman…	6%	6%
Bethesda	5%	5%
Towson	1%	5%
Deep Creek	5%	25%
Arundel Mills	3%	5%
Westminster	1%	4%
Solomons	3%	4%
Silver Spring	4%	8%
Salisbury	4%	6%
Owings Mills	1%	4%
Hagerstown	3%	4%
Frederick	4%	4%
Ellicott City	4%	4%
Calvert Cliffs	4%	3%

With Plans (n=207) Without Plans (n=82)

Destination	With Plans	Without Plans
Tilghman Island	3%	5%
St. Mary's City	3%	3%
Sharpsburg	3%	11%
Joint Base Andrews	3%	1%
Frostburg	3%	4%
Denton	3%	3%
Bel Air	3%	3%
Aberdeen	3%	1%
St. Michaels	2%	11%
Prince Frederick	2%	1%
North East	2%	1%
La Plata	2%	1%
Havre de Grace	2%	4%
Easton	2%	1%
Cumberland	2%	13%
Chestertown	2%	1%
Berlin	2%	4%
Smith Island	1%	6%
Queenstown	1%	1%
Crisfield		5%

With Plans (n=207) Without Plans (n=82)

Awareness
Interest
Consideration
Intent
Travel Plans

63

Future Travel: Activities

Chart: With Plans (n=207) vs Without Plans (n=82)

Activity	With Plans	Without Plans
Local seafood	47%	57%
Beach	45%	57%
Shopping	40%	40%
Sightseeing	35%	52%
Historic site	30%	46%
Local culinary scene	29%	
Visit friends and/or family	28%	37%
Visit a town	28%	43%
Scenic drive	27%	48%
Experience local culture	27%	35%
National or state park	25%	35%
Watersports/water activities	17%	21%
Swimming	18%	21%
Live music	21%	
Brewery/winery/distillery	20%	
Museum	19%	33%
Hiking	18%	26%
Local festival	17%	32%
Casino/Gambling	13%	15%
Personal celebration	10%	14%
Fishing or hunting	12%	
Biking	10%	11%
Guided tour		13%
Other		
None of these		

• 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.
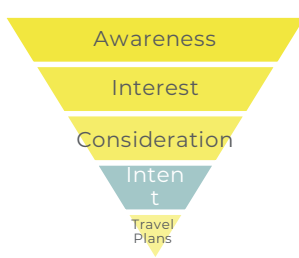
64

Future Travel: Trip Drivers

Primary Purpose

Primary Purpose	%
Family vacation	23%
Visit friends and/or family	17%
Couples getaway	17%
Outdoor recreation	13%
Multi-generational family trip	5%
Passing through as part of a longer trip	4%
Shopping	4%
Other	3%
Visit an attraction	3%
Wedding, reunion, or other family event	3%
Casino/gambling	2%
Festival or event	2%
Youth sports (including tournaments)	1%
Medical treatment	1%
Professional or college sports	1%

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
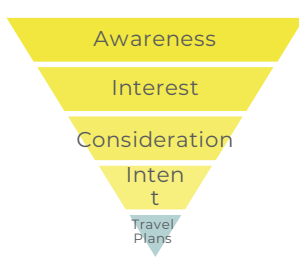
Timeline for Travel
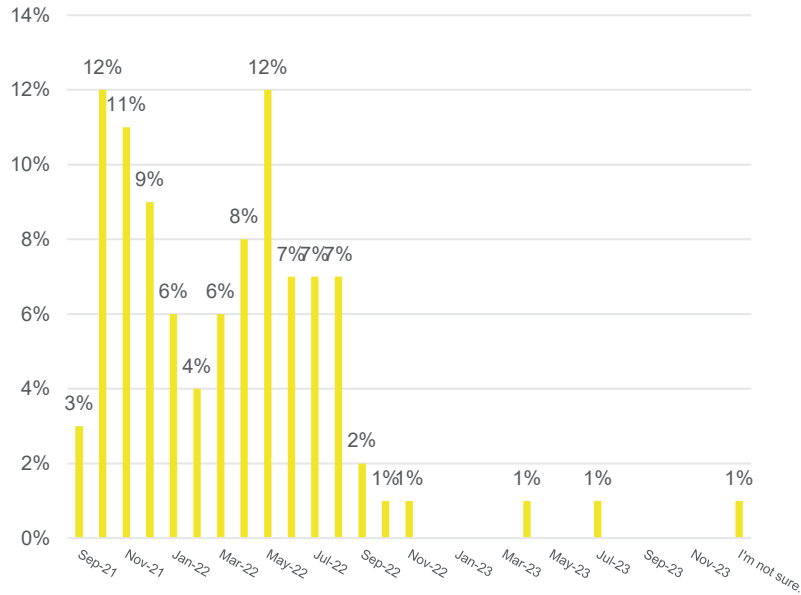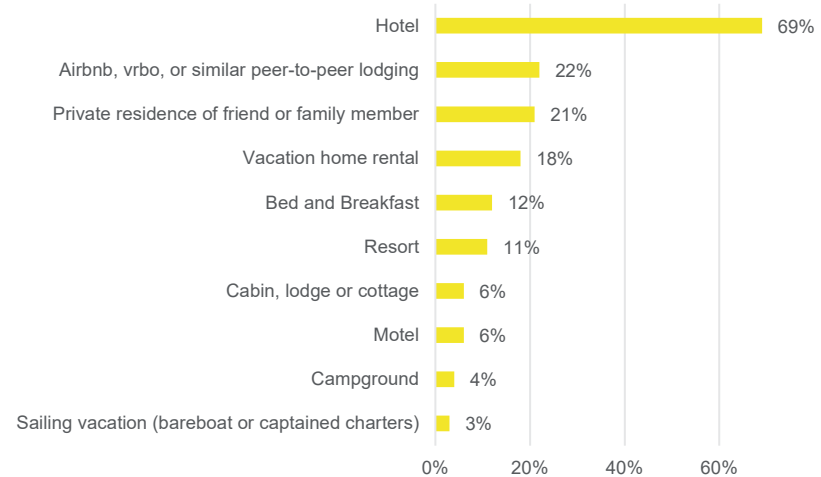
Period	Value
Sep-21	3%
	12%
Nov-21	11%
	9%
Jan-22	6%
	4%
Mar-22	6%
	8%
May-22	12%
	7%
Jul-22	7%
	7%
Sep-22	2%
	1%
Nov-22	1%
Mar-23	1%
Jul-23	1%
I'm not sure.	1%

Lodging

Hotel	69%
Airbnb, vrbo, or similar peer-to-peer lodging	22%
Private residence of friend or family member	21%
Vacation home rental	18%
Bed and Breakfast	12%
Resort	11%
Cabin, lodge or cottage	6%
Motel	6%
Campground	4%
Sailing vacation (bareboat or captained charters)	3%

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.

66

Visitor Perceptions & Behaviors: By Region

Key Takeaways on Regional Differences

- The Lower Shore region has the highest spending per trip as well as the highest net promoter score (NPS). Future intent to visit the Lower Shore is second only to the central region.
  - Visitors are likely to stay 4.6 nights and travel with 3.8 people on a family vacation.

- The Western Region also has high per-trip spend and NPS scores, but one of the lowest visit intentions.
  - Visitors are most likely to come from D.C. on a family vacation, staying 2.9 nights and staying with 4.3 people.

- The Central region has the highest visit intentions, but the lowest NPS score and a relatively low per trip spend.
  - 84% of visitors stay 2.7 nights with 3.1 people and are likely to visit friend and relatives.

- The Capital region has high visitor intent and mid-range trip spending.
  - 86% of visitors stay 2.9 nights in a party of 3.1 and are likely to be VFR. New York is a strong

	Likely to visit	Origin	% stayed overnight	# of nights	NPS	Party size	Per trip spend	Purpose
Western	12%	DC	93%	2.9	50.9	4.3	$1,271	Family vacation
Capital	33%	NY	86%	2.9	30.7	3.1	$1,144	VFR
Southern	17%	Baltimore	86%	2.9	17.9	3.5	$1,294	VFR
Central	47%	Baltimore	84%	2.7	9.6	3.1	$1,032	VFR
Upper Shore	12%	Baltimore	84%	2.8	33.3	3.5	$1,145	VFR
Mid-Shore	14%	Baltimore	83%	2.3	40.6	2.9	$958	Couples getaway
Lower Shore	42%	Baltimore	92%	4.6	63.5	3.8	$1,533	Family vacation

Western Region Future Traveler Intent

Perceptions

They plan to come for the purpose of:

Purpose	%
Couples getaway	21%
Family vacation	21%
Outdoor recreation	17%
Visit friends and/or family	13%
Shopping	8%
Festival or event	4%
Multi-generational family trip	4%
Passing through as part of a longer trip	4%
Professional or college sports	4%
Wedding, reunion, or other family event	4%

Visitors are likely to come from:

	%
Washington DC	33% ▲
Baltimore	17%
Columbus	13%
New York	13%
Philadelphia	13%
Cincinnati	4%
Cleveland	4%
Pittsburgh	4%

Market SUMMARY
Filter: Western; sample size = 24; 98%
filtered out; 95% confidence level

They have plans to visit in:

Month	%
Sep 2021	4%
Oct 2021	17%
Nov 2021	4%
Dec 2021	9%
Jan 2022	4%
Feb 2022	4%
Mar 2022	26%
Apr 2022	13%
May 2022	9%
Aug 2022	4%
Nov 2022	4%

69

Western Region Past Visitors

Net promoter score

50.9

-100   100

(% Promoters - % Detractors)

Avg# of past trips

5.5

Overnight stay?

Yes 93%

No.

Avg # of nights stayed

2.9

Month of most recent visit

Month	%
January	2%
February	6%
March	4%
April	8%
May	4%
June	9%
July	11%
August	17%
September	14%
October	19%
November	4%
December	2%

Lodging for most recent vist

Lodging	%
Hotel	29%
Vacation home rental	20%
Friend/family home	14%
Airbnb, vrbo, or similar	14%
Campground	11%
Cabin, lodge or cottage	10%
Motel	8%
Resort	4%
Bed and Breakfast	4%
Other	2%

Source: Engaged Traveler Survey (travelers responding via DMO)

70

Western Region Past Visitors

They came for the purpose of:

Purpose	Percentage
Family vacation	21%
Outdoor recreation	18%
Couples getaway	16%
Visit friends and/or family	10%
Visit an attraction	7%
Multi-generational family trip	5%
Wedding, reunion, or other family event	4%
Passing through as part of a longer trip	3%
Festival or event	2%
Shopping	2%
Casino/gambling	1%
Youth sports (including tournaments)	1%
Professional or college sports	
Medical treatment	
Other	9%

They traveled with:

Companion	Percentage
Partner/spouse	69%
Children under 18	22%
Friends	22%
Other family members	15%
Adult children	13%
Parents/In-laws	10%
Colleagues	2%
Other	7%

Avg party size

4.3

Avg per trip spending

$1,271

Source: Engaged Traveler Survey (travelers responding via DMO)

Capital Region Future Traveler Intent

Visitors are likely to come from:

	%
New York	19%
Pittsburgh	18%
Philadelphia	16%
Washington DC	16%
Baltimore	12%
Cincinnati	6%
Cleveland	6%
Columbus	6%

Market SUMMARY
Filter: Capital; sample size = 67; 94%
filtered out; 95% confidence level

Perceptions

They plan to come for the purpose of:

Purpose	%
Family vacation	28%
Visit friends and/or family	24%
Outdoor recreation	10%
Couples getaway	9%
Multi-generational family trip	7%
Passing through as part of a longer trip	4%
Shopping	4%
Wedding, reunion, or other family event	3%
Festival or event	
Professional or college sports	

They have plans to visit in:

Month	%
Sep 2021	4%
Oct 2021	6%
Nov 2021	13%
Dec 2021	9%
Jan 2022	8%
Feb 2022	5%
Mar 2022	11%
Apr 2022	11%
May 2022	13%
Jun 2022	6%
Jul 2022	3%
Aug 2022	5%
Sep 2022	1%
Oct 2022	1%
Sep 2023	1%
Oct 2023	1%
I'm not sure.	1%

Source: Travel Intent Survey (random leisure travelers)

72

Capital Region Past Visitors

Net promoter score

30.7

-100   100

(% Promoters - % Detractors)

Avg# of past trips

5.3

Overnight stay?

Yes 86%

No 14%

Avg # of nights stayed

2.9

Month of most recent visit

Month	Percent
January	3%
February	4%
March	7%
April	9%
May	9%
June	16%
July	8%
August	9%
September	13%
October	14%
November	7%
December	1%

Lodging for most recent vist

Lodging	Percent
Hotel	43%
Friend/family home	22%
Airbnb, vrbo, or similar	18%
Motel	16%
Resort	10%
Vacation home rental	9%
Bed and Breakfast	7%
Campground	7%
Cabin, lodge or cottage	6%
Other	1%

Source: Engaged Traveler Survey (travelers responding via DMO)

73

Capital Region Past Visitors

They came for the purpose of:

Purpose	%
Visit friends and/or family	18%
Couples getaway	14%
Outdoor recreation	10%
Family vacation	9%
Shopping	8%
Wedding, reunion, or other family event	6%
Festival or event	5%
Passing through as part of a longer trip	5%
Visit an attraction	4%
Casino/gambling	4%
Multi-generational family trip	3%
Professional or college sports	3%
Medical treatment	2%
Youth sports (including tournaments)	2%
Other	8%

They traveled with:

With	%
Partner/spouse	52%
Friends	25%
Adult children	14%
Children under 18	12%
Other family members	11%
Parents/In-laws	8%
Colleagues	3%
Other	8%

Avg party size

3.1

Avg per trip spending

$1,144

Source: Engaged Traveler Survey (travelers responding via DMO)

Southern Region Future Traveler Intent

Visitors are likely to come from:

	%
Baltimore	24%
Washington DC	21%
New York	18%
Pittsburgh	12%
Cleveland	9%
Philadelphia	9%
Columbus	6%
Cincinnati	3%

Market SUMMARY
Filter: Southern; sample size = 34; 97%
filtered out; 95% confidence level

Perceptions

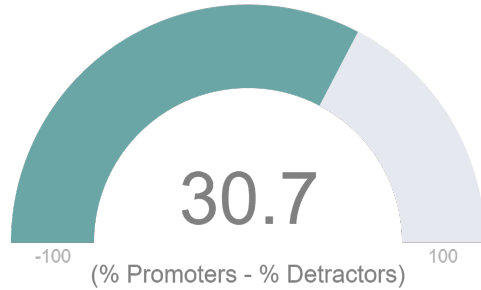## They plan to come for the purpose of:

Purpose	%
Family vacation	26%
Visit friends and/or family	18%
Couples getaway	12%
Multi-generational family trip	9%
Shopping	6%
Outdoor recreation	3%
Passing through as part of a longer trip	3%
Wedding, reunion, or other family event	3%
Festival or event	
Professional or college sports	

They have plans to visit in:

Sep 2021: 9%, Oct 2021: 6%, Nov 2021: 9%, Dec 2021: 15%, Jan 2022: 6%, Feb 2022: 3%, Mar 2022: 6%, Apr 2022: 6%, May 2022: 15%, Jun 2022: 3%, Jul 2022: 3%, Aug 2022: 9%, Oct 2022: 3%, Nov 2022: 3%, Sep 2023: 3%

Source: Travel Intent Survey (random leisure travelers)

75

Southern Region Past Visitors

Net promoter score

17.9

-100   100

(% Promoters - % Detractors)

Avg# of past trips

4.6

Overnight stay?

Yes 86%

No...

Avg # of nights stayed

2.9

Month of most recent visit

Month	%
January	1%
February	5%
March	6%
April	11%
May	10%
June	8%
July	10%
August	13%
September	21%
October	10%
November	2%
December	2%

Lodging for most recent vist

Lodging	%
Hotel	37%
Airbnb, vrbo, or similar	26%
Friend/family home	18%
Motel	16%
Cabin, lodge or cottage	12%
Bed and Breakfast	11%
Vacation home rental	8%
Resort	8%
Campground	6%
Other	1%

Source: Engaged Traveler Survey (travelers responding via DMO)

76

Southern Region Past Visitors

They came for the purpose of:

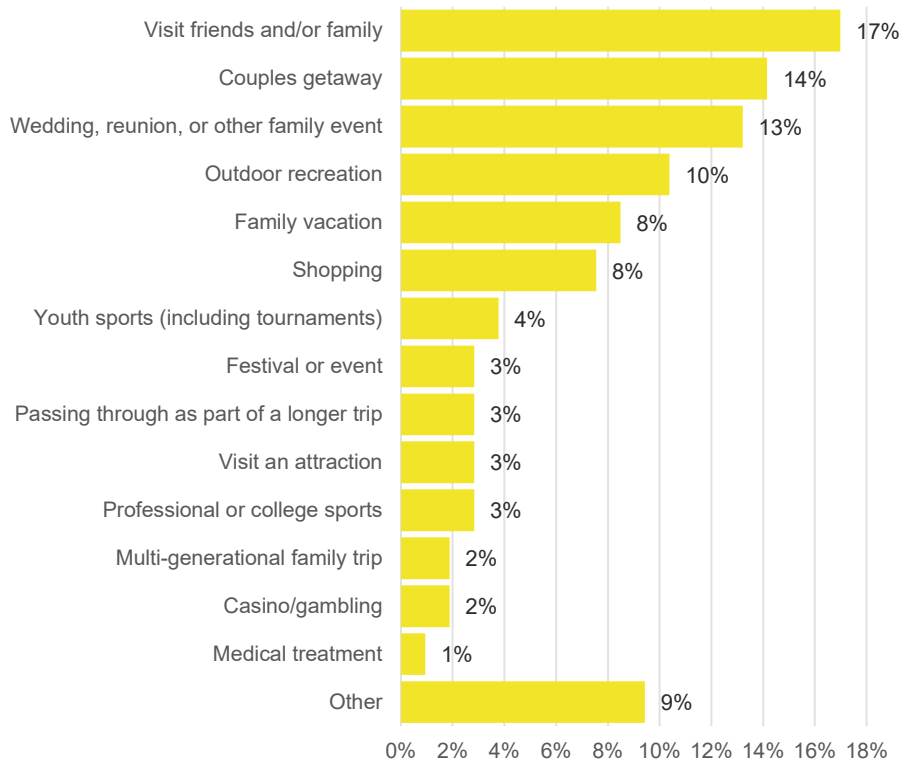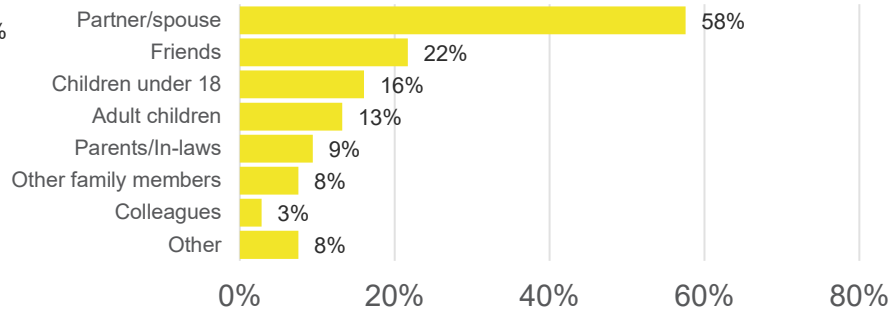| Purpose	Percentage
Visit friends and/or family	17%
Couples getaway	14%
Wedding, reunion, or other family event	13%
Outdoor recreation	10%
Family vacation	8%
Shopping	8%
Youth sports (including tournaments)	4%
Festival or event	3%
Passing through as part of a longer trip	3%
Visit an attraction	3%
Professional or college sports	3%
Multi-generational family trip	2%
Casino/gambling	2%
Medical treatment	1%
Other	9%

They traveled with:

Partner/spouse	58%
Friends	22%
Children under 18	16%
Adult children	13%
Parents/In-laws	9%
Other family members	8%
Colleagues	3%
Other	8%

Avg party size

3.5

Avg per trip spending

$1,294

Source: Engaged Traveler Survey (travelers responding via DMO)

Central Region Future Traveler Intent

Visitors are likely to come from:

	%
Baltimore	23% ▲
Washington DC	20% ▲
Philadelphia	17%
New York	11%
Pittsburgh	11%
Columbus	8%
Cincinnati	7%
Cleveland	2% ▼

Market SUMMARY
Filter: Central; sample size = 96; 91% filtered out;

Perceptions

They plan to come for the purpose of:

Purpose	%
Visit friends and/or family	22%
Family vacation	20%
Couples getaway	13%
Outdoor recreation	8%
Multi-generational family trip	5%
Passing through as part of a longer trip	5%
Shopping	5%
Wedding, reunion, or other family event	4%
Festival or event	2%
Professional or college sports	2%

They have plans to visit in:

Month	%
Sep 2021	4%
Oct 2021	14%
Nov 2021	13%
Dec 2021	11%
Jan 2022	7%
Feb 2022	4%
Mar 2022	4%
Apr 2022	7%
May 2022	12%
Jun 2022	4%
Jul 2022	5%
Aug 2022	4%
Sep 2022	1%
Oct 2022	2%
Nov 2022	1%
Feb 2023	1%
Jul 2023	1%
Sep 2023	1%
Oct 2023	1%
Dec 2023	1%

Source: Travel Intent Survey (random leisure travelers)

78

Central Region Past Visitors

Net promoter score

9.6

-100   100

(% Promoters - % Detractors)

Avg# of past trips

6.5

Overnight stay?

Yes 84%

No 16%

Avg # of nights stayed

2.7

Month of most recent visit

Month	%
January	3%
February	5%
March	5%
April	7%
May	11%
June	12%
July	10%
August	10%
September	14%
October	14%
November	6%
December	2%

Lodging for most recent vist

Lodging	%
Hotel	54%
Friend/family home	25%
Airbnb, vrbo, or similar	13%
Motel	12%
Bed and Breakfast	10%
Vacation home rental	8%
Cabin, lodge or cottage	5%
Resort	4%
Campground	3%
Other	2%

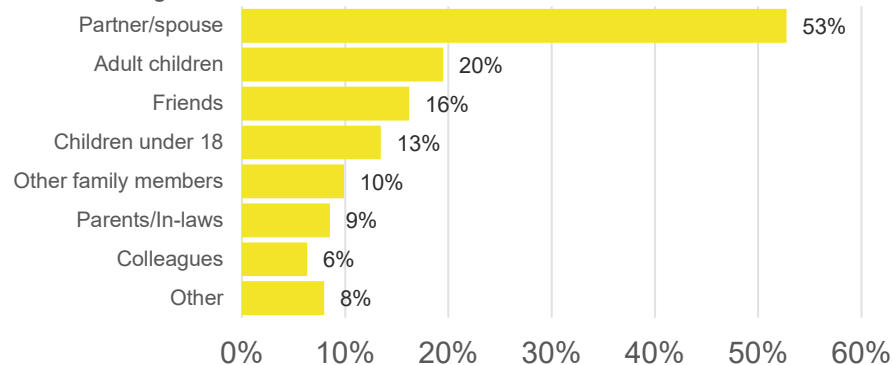*Source: Engaged Traveler Survey (travelers responding via DMO)*

79

Central Region Past Visitors

They came for the purpose of:

Purpose	%
Visit friends and/or family	18%
Couples getaway	12%
Wedding, reunion, or other family event	10%
Medical treatment	7%
Professional or college sports	6%
Family vacation	6%
Passing through as part of a longer trip	6%
Visit an attraction	6%
Festival or event	5%
Outdoor recreation	5%
Shopping	4%
Multi-generational family trip	4%
Youth sports (including tournaments)	2%
Casino/gambling	1%
Other	8%

They traveled with:

	%
Partner/spouse	53%
Adult children	20%
Friends	16%
Children under 18	13%
Other family members	10%
Parents/In-laws	9%
Colleagues	6%
Other	8%

Avg party size

3.1

Avg per trip spending

$1,032

Source: Engaged Traveler Survey (travelers responding via DMO)

Upper Shore Region Future Traveler Intent

Visitors are likely to come from:

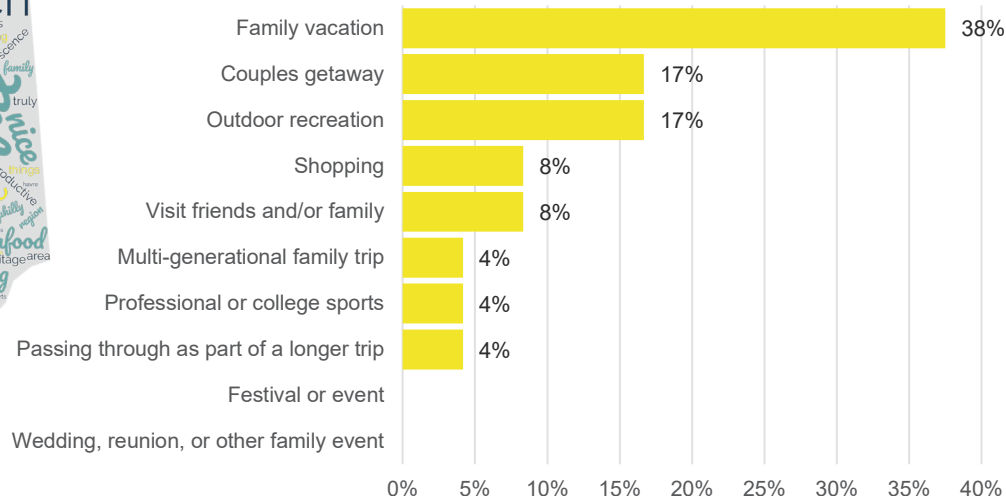|	%
Baltimore	28% ▲
New York	16%
Philadelphia	16%
Cleveland	12%
Cincinnati	8%
Columbus	8%
Washington DC	8%
Pittsburgh	4%

Market SUMMARY
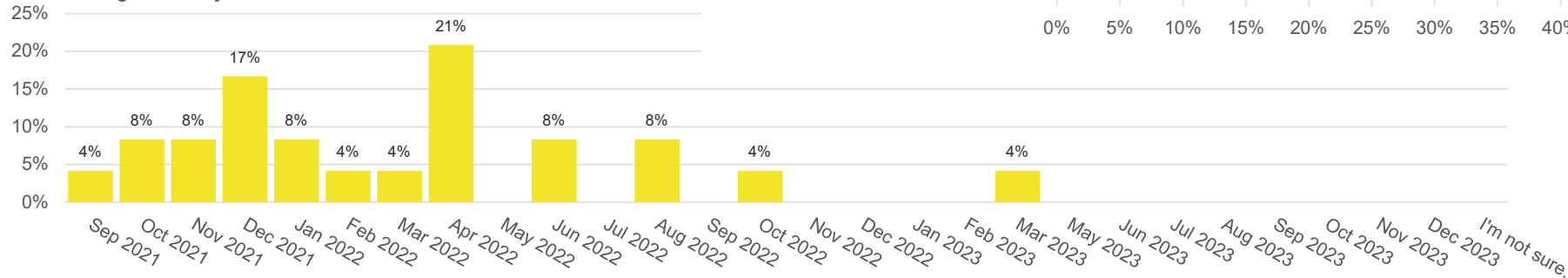Filter: Upper Shore; sample size = 25; 98% filtered out; 95% confidence level

Perceptions

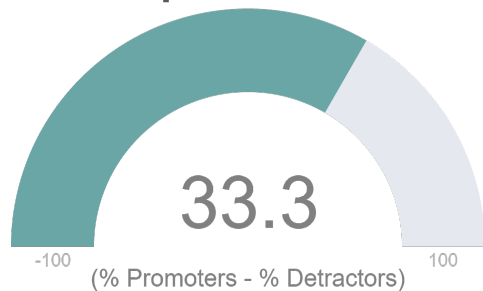## They plan to come for the purpose of:

- Family vacation — 38%
- Couples getaway — 17%
- Outdoor recreation — 17%
- Shopping — 8%
- Visit friends and/or family — 8%
- Multi-generational family trip — 4%
- Professional or college sports — 4%
- Passing through as part of a longer trip — 4%
- Festival or event
- Wedding, reunion, or other family event

They have plans to visit in:

- Sep 2021 — 4%
- Oct 2021 — 8%
- Nov 2021 — 8%
- Dec 2021 — 17%
- Jan 2022 — 8%
- Feb 2022 — 4%
- Mar 2022 — 4%
- Apr 2022 — 21%
- Jun 2022 — 8%
- Aug 2022 — 8%
- Oct 2022 — 4%
- Feb 2023 — 4%

Source: Travel Intent Survey (random leisure travelers)

Upper Shore Region Past Visitors

Net promoter score

33.3

-100   100

(% Promoters - % Detractors)

Avg# of past trips

5.8

Overnight stay?

Yes 84%

No 16%

Avg # of nights stayed

2.8

Month of most recent visit

- January 5%
- February 5%
- March 5%
- April 6%
- May 8%
- June 14%
- July 5%
- August 3%
- September 27%
- October 16%
- November 5%
- December 2%

Lodging for most recent vist

- Hotel 36%
- Friend/family home 21%
- Bed and Breakfast 19%
- Motel 17%
- Airbnb, vrbo, or similar 11%
- Resort 11%
- Vacation home rental 9%
- Cabin, lodge or cottage 6%
- Campground 6%
- Other 4%

Source: Engaged Traveler Survey (travelers responding via DMO)

Upper Shore Region Past Visitors

They came for the purpose of:

Purpose	Percentage
Visit friends and/or family	18%
Couples getaway	12%
Outdoor recreation	12%
Wedding, reunion, or other family event	10%
Festival or event	10%
Professional or college sports	7%
Passing through as part of a longer trip	5%
Multi-generational family trip	5%
Shopping	
Family vacation	2%
Medical treatment	2%
Youth sports (including tournaments)	2%
Casino/gambling	2%
Visit an attraction	
Other	12%

They traveled with:

	Percentage
Partner/spouse	62%
Friends	25%
Adult children	13%
Children under 18	12%
Parents/In-laws	10%
Other family members	8%
Colleagues	3%
Other	10%

Avg party size

3.5

Avg per trip spending

$1,145

Source: Engaged Traveler Survey (travelers responding via DMO)

Mid-Shore Region Future Traveler Intent

Visitors are likely to come from:

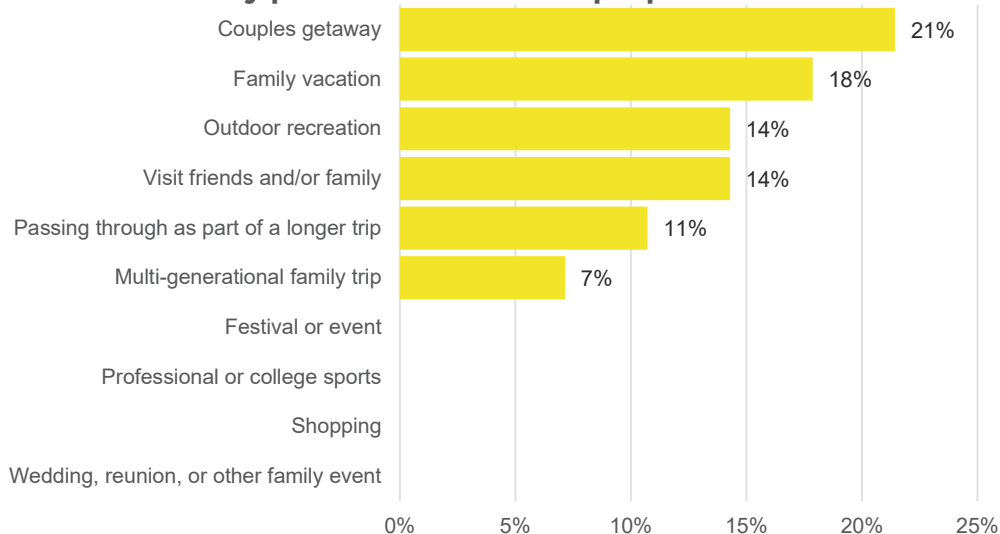|	%
Baltimore	25% ▲
Washington DC	18%
New York	14%
Philadelphia	14%
Columbus	11%
Cincinnati	7%
Pittsburgh	7%
Cleveland	4%

Market SUMMARY
Filter: Midshore; sample size =
28; 97% filtered out;
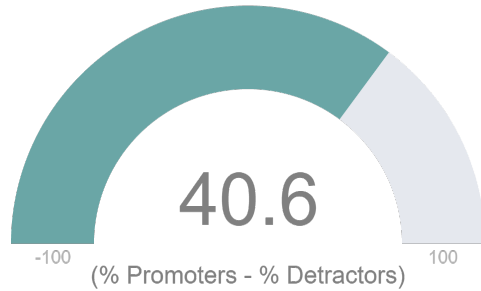
Perception

They plan to come for the purpose of:

- Couples getaway — 21%
- Family vacation — 18%
- Outdoor recreation — 14%
- Visit friends and/or family — 14%
- Passing through as part of a longer trip — 11%
- Multi-generational family trip — 7%
- Festival or event
- Professional or college sports
- Shopping
- Wedding, reunion, or other family event

They have plans to visit in:

Month	%
Sep 2021	0%
Oct 2021	7%
Nov 2021	15%
Dec 2021	19%
Jan 2022	11%
Feb 2022	4%
Mar 2022	4%
Apr 2022	4%
May 2022	15%
Jun 2022	4%
Jul 2022	4%
Aug 2022	7%
Sep 2022	0%
Oct 2022	4%
Nov 2022	0%
Dec 2022	0%
Jan 2023	0%
Feb 2023	0%
Mar 2023	0%
May 2023	0%
Jun 2023	0%
Jul 2023	0%
Aug 2023	0%
Sep 2023	0%
Oct 2023	0%
Nov 2023	0%
Dec 2023	0%
I'm not sure.	4%

Source: Travel Intent Survey (random leisure travelers)

Mid-Shore Region Past Visitors

Net promoter score

40.6

-100   100

(% Promoters - % Detractors)

Avg# of past trips

4.4

Overnight stay?

Yes 83%

No 17%

Avg # of nights stayed

2.3

Month of most recent visit

- January: 3%
- February: 3%
- March: 4%
- April: 7%
- May: 13%
- June: 7%
- July: 15%
- August: 12%
- September: 17%
- October: 13%
- November: 6%
- December: 1%

Lodging for most recent vist

- Hotel: 42%
- Bed and Breakfast: 16%
- Friend/family home: 13%
- Motel: 6%
- Airbnb, vrbo, or similar: 5%
- Resort: 5%
- Campground: 4%
- Cabin, lodge or cottage: 3%
- Vacation home rental: 1%
- Other: 8%

Source: Engaged Traveler Survey (travelers responding via DMO)

85

Mid-Shore Region Past Visitors

They came for the purpose of:

Purpose	Percentage
Couples getaway	23%
Visit friends and/or family	12%
Outdoor recreation	10%
Passing through as part of a longer trip	8%
Family vacation	8%
Festival or event	8%
Visit an attraction	5%
Shopping	3%
Multi-generational family trip	3%
Wedding, reunion, or other family event	
Youth sports (including tournaments)	2%
Professional or college sports	
Medical treatment	
Casino/gambling	
Other	17%

They traveled with:

Traveled with	Percentage
Partner/spouse	67%
Friends	17%
Children under 18	8%
Other family members	8%
Adult children	7%
Colleagues	4%
Parents/In-laws	4%
Other	8%

Avg party size

2.9

Avg per trip spending

$958

Lower Shore Region Future Traveler Intent

Visitors are likely to come from:

	%
Baltimore	35% ▲
Washington DC	17%
Pittsburgh	16%
Philadelphia	13%
New York	8%
Columbus	5% ▼
Cleveland	3% ▼
Cincinnati	2% ▼

Market SUMMARY
Filter: Lower Shore; sample size = 86; 92% filtered out; 95% confidence level

Perceptions

They plan to come for the purpose of:

Purpose	%
Family vacation	34%
Couples getaway	28%
Outdoor recreation	13%
Visit friends and/or family	6%
Multi-generational family trip	5%
Passing through as part of a longer trip	5%
Festival or event	2%
Professional or college sports	1%
Shopping	1%
Wedding, reunion, or other family event	

They have plans to visit in:

Month	%
Sep 2021	4%
Oct 2021	15%
Nov 2021	5%
Dec 2021	8%
Jan 2022	1%
Feb 2022	4%
Mar 2022	2%
Apr 2022	8%
May 2022	12%
Jun 2022	12%
Jul 2022	13%
Aug 2022	7%
Sep 2022	5%
Oct 2022	1%
Nov 2022	1%
May 2023	1%
Jun 2023	1%

Source: Travel Intent Survey (random leisure travelers)

87

Lower Shore Region Past Visitors

Net promoter score

63.5

-100   100

(% Promoters - % Detractors)

Avg# of past trips

8.9

Overnight stay?

Yes 92%

No 8%

Avg # of nights stayed

4.6

Month of most recent visit

Month	%
January	1%
February	1%
March	1%
April	2%
May	5%
June	11%
July	15%
August	21%
September	21%
October	17%
November	4%
December	1%

Lodging for most recent vist

Lodging	%
Hotel	48%
Friend/family home	15%
Vacation home rental	14%
Airbnb, vrbo, or similar	8%
Motel	6%
Campground	
Resort	3%
Cabin, lodge or cottage	1%
Bed and Breakfast	
Other	9%

Source: Engaged Traveler Survey (travelers responding via DMO)

88

Lower Shore Region Past Visitors

They came for the purpose of:

Purpose	Percentage
Family vacation	39%
Couples getaway	15%
Other	11%
Festival or event	10%
Outdoor recreation	7%
Multi-generational family trip	5%
Visit friends and/or family	5%
Visit an attraction	3%
Shopping	2%
Passing through as part of a longer trip	1%
Wedding, reunion, or other family event	1%
Youth sports (including tournaments)	1%
Casino/gambling	
Professional or college sports	
Medical treatment	

They traveled with:

With	Percentage
Partner/spouse	68%
Children under 18	25%
Adult children	23%
Other family members	17%
Friends	15%
Parents/In-laws	9%
Colleagues	1%
Other	7%

Avg party size

3.8

Avg per trip spending

$1,533

Visitor Segments

Higher Net Promoter Score

Lower Net Promoter Score

Happy Couple Explorers

Beach Loyalists

Rival Fans

Big Family Vacationers

Lower Lifetime Value Index

Higher Lifetime Value Index

Primary Visitor Segments

MD Segments by Net Promoter Score and Overall Tourism Value

Happy Explorers

Beach Loyalists

Big Family Vacationers

Rival Fans

Higher NPS

Lower NPS

Lower Lifetime Value Index

Higher Lifetime
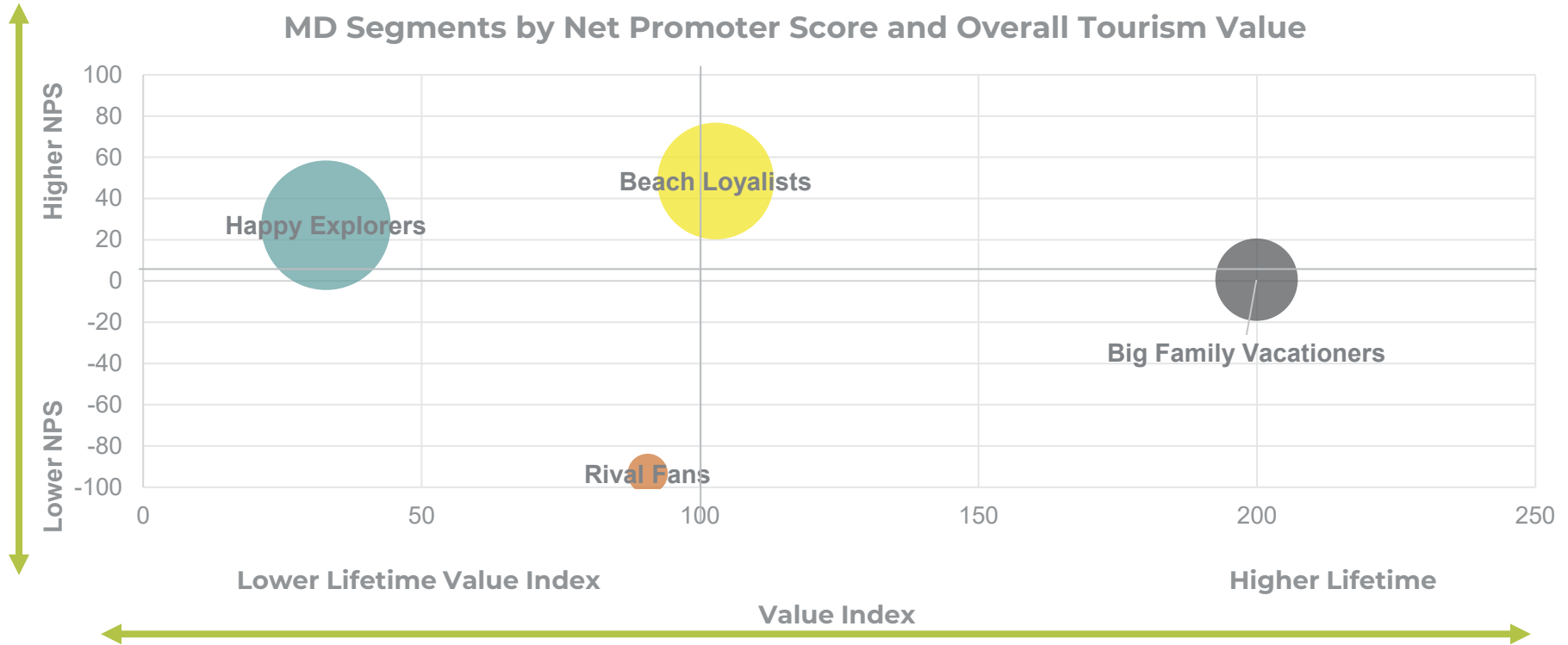
Value Index

Segment Summaries

Happy Explorers (3)

- Middle aged residents, hesitant to travel
- 3.1 ppl; 2.3 nights in hotels; $750/trip
- **NPS = 27.1**
- 3.1 trips to a number of regions-- most recently in the past 2 years (66% 2020-2021).
- **Value Index = 33**
- Travels with spouse
- Trip drivers: VFR, couples getaway, outdoor recreation
- Top activities: towns, scenic drives, seafood, beach, sightseeing, state parks.
- Top MD descriptors: seafood/crabs, waterfront towns, Chesapeake Bay, affordable.

Beach Loyalists (1)

- Older non-residents, back to traveling normally
- 2.8 ppl; 2.8 nights in hotels; $690/trip
- **NPS = 48.5**
- More than 10 trips to Lower Shore-- most recently last year (70% 2021).
- **Value Index = 103**
- Travels with spouse, friends, or alone.
- Trip drivers: VFR, couples getaway, festival/event
- Top activities (more overall): beach, seafood, towns, shopping, VFR, scenic drives, state parks.
- Top MD descriptors: seafood/crabs, Chesapeake Bay, beaches.

Rival Fans (4)

- Younger non-residents, hesitant to travel
- 4.7 ppl; 4.1 nights in motels, family, cabins; $1100 per trip
- **NPS = -93.5**
- 5.5 trips to Central or Capital–most recently 2 years ago (85% 2019-2020)
- **Value Index = 91**
- Travels with family, spouse, parents/in-laws, colleagues
- Trip drivers: sports, shopping, medical, casino
- Top activities (fewer overall): museum,

Big Family Vacationers (2)

- Younger residents, back to traveling normally
- 4.3 ppl; 4.1 nights in home rentals; $3k per trip
- **NPS = 0.6**
- 4.5 trips to Lower Shore or Western—most recently in the past 2 years (74% 2020-2021)
- **Value Index = 200**
- Travels with spouse, children, friends, parents/in-laws
- Trip drivers: family vacation
- Top activities: shopping, towns, historic sites, beach
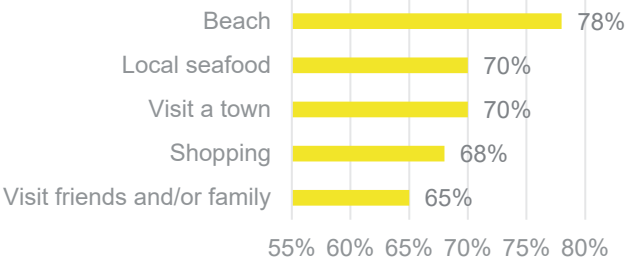- Top MD descriptors: unique experiences, TV shows/film.

93

Net Promoter Score: 48.5
-100 … 100
(% Promoters - % Detractors)

Trip drivers

- Visit friends and/or family — 22%
- Couples getaway — 13%
- Festival or event — 10%

0% 5% 10% 15% 20% 25%

Trip activities

- Beach — 78%
- Local seafood — 70%
- Visit a town — 70%
- Shopping — 68%
- Visit friends and/or family — 65%

55% 60% 65% 70% 75% 80%
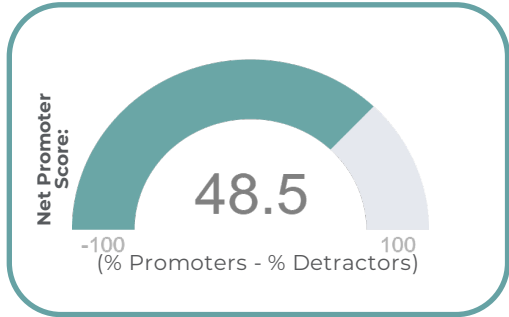
Describes MD as:

Seafood/Crabs

Chesapeake Bay

Outdoor Recreation

Beaches

Avg Party Size

2.8

10.5 Trips

2.8 Nights

$689 per Trip

94

Big Family Vacationers (17% of visitors)

Net Promoter Score:

0.6

-100 | 100

(% Promoters - % Detractors)

Trip drivers

Family vacation	34%
Couples getaway	13%
Outdoor recreation	10%

0% 10% 20% 30% 40%

Trip activities

Shopping	34%
Historic site	33%
Visit a town	31%
Beach	31%
Nation or state park	30%

28% 30% 32% 34% 36%
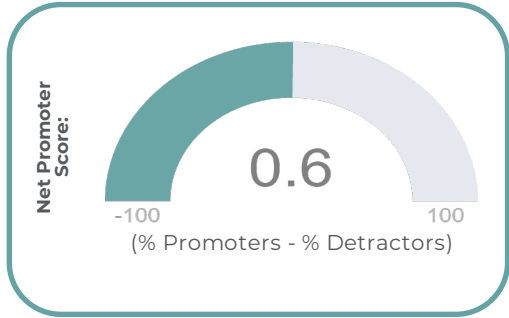
Describes MD as:

Outdoor Recreation

Unique experiences

Chesapeake Bay

Water Activities

Avg Party Size

4.3

4.5 Trips

4.1 Nights

$3,126 per Trip

95

Happy Explorers (42% of visitors)
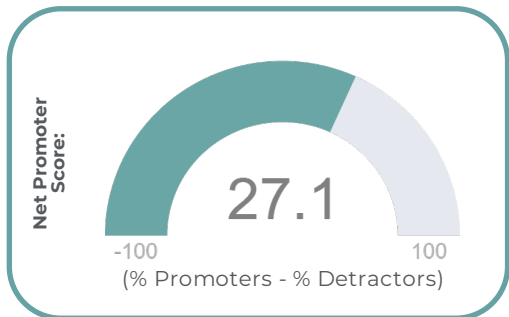
Net Promoter Score:

27.1

-100   100

(% Promoters - % Detractors)

Trip drivers

Visit friends and/or family	18%
Couples getaway	17%
Outdoor recreation	13%

0%   5%   10%   15%   20%

Trip activities

Visit a town	59%
Local seafood	53%
Scenic drive	53%
Beach	53%
Historic site	49%

0%   20%   40%   60%   80%

Describes MD as:

Seafood/Crabs

Chesapeake Bay

Beaches

Outdoor Recreation

Waterfront towns

Avg Party Size

3.1

3.1 Trips

2.3 Nights

$744 per Trip

96

Rival Fans (4% of visitors)

Trip drivers

Sports	51%
Shopping	24%
Medical treatment	13%

Trip activities

Museum	31%
Sightseeing	28%
Historic site	27%
Brewery/winery/distillery	27%
Experience local culture	25%

Net Promoter Score:

-93.5

-100   100
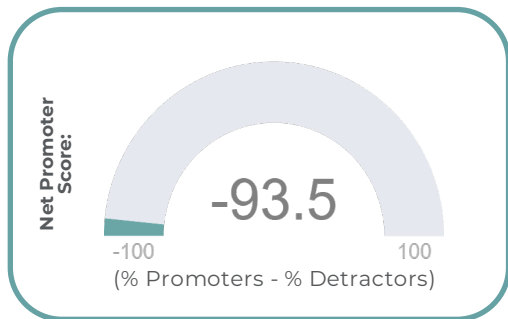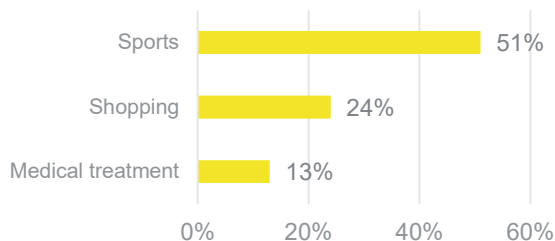
(% Promoters - % Detractors)
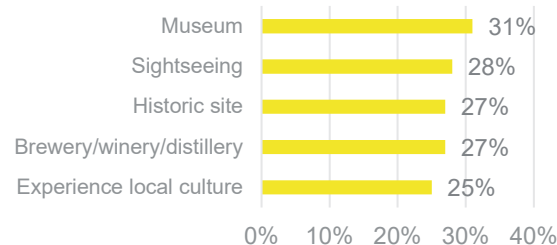
Describes MD as:

Pro Sports

Chesapeake Bay

Waterfront towns

TV Shows/Films

Avg Party Size

4.7

5.5	4.1	$1,159
Trips	**Nights**	**per Trip**

Questions?

Appendix A: Predictive Methodology Statement

Overview
Tourism Economics has worked with STR to develop a suite of models to accurately track and forecast hotel performance across a number of markets worldwide. Robust equations have been econometrically estimated that closely follow past movements in hotel performance as measured by STR. These equations are used to forecast hotel performance using economic forecasts from Oxford Economics' global macroeconomic database as well as Oxford Economics' global city and region forecasts. Economic forecasts are augmented with specific intelligence to determine the additional effect on hotel demand and ADR of any events hosted within that market. Detailed calculation is undertaken using estimated relationships for Supply, Demand and ADR. Occupancy, Revenue and RevPAR are calculated as identities: Occupancy = Demand / Supply; Revenue = Demand * ADR; RevPAR = Revenue / Supply

Supply
Expected room supply is calculated in the near term according to the STR and STR Global pipeline database, adjusted for each property's stage in the development process. Projects under construction are more likely to be completed, and completed on time, than those still in the planning process. Different probabilities of completion have also been calculated according to the size and complexity of each project. Property conversions and closures are also accounted for, with estimates of other commercial property demand. In the medium to long-run the pipeline database is augmented with estimates of past supply trends and the relationship with occupancy. Typically supply growth follows periods of demand and occupancy growth. Notably, periods of sustained above average occupancy rates are followed by supply growth necessary to restore average occupancy. The historic volatility of supply is taken into consideration as well as the lag between occupancy and supply growth and the time taken for occupancy to return to the long-run average.

Demand
Room demand is estimated and forecast according to a set of key economic drivers relating to both the destination and key origin markets. The relative importance of each economic driver is estimated according to multi-variate regression analysis and the relative volatility of drivers and demand. Long-run trends are also included within the modelling as well as short-run dynamics.
The key drivers are listed below along with the average elasticity across all markets (economic drivers relate to data for the country where not stated). Actual coefficients applied vary to reflect estimated historic relationships specific to each market. *Note: elasticities refer to the percent change in demand according to the percent change in each driver - a combination of the volatility of each driver as well as its correlation with demand. This does not necessarily mean that GDP is a better predictor of demand than wealth, but shows that wealth is more volatile so one percent change in wealth has less impact on demand than one percent change in GDP. All indicators are statistically valid.*

Key Driver	Avg elasticity
State GDP	0.24
National GDP	0.39
Key origin market GDP	0.45
Net Wealth	0.10
Company Profits	0.10
Unemployment	-0.02
Exchange Rate	-0.17
ADR (lagged)	-0.15

ADR
ADR is estimated and forecast according to recent changes in occupancy as well as price inflation within the country. Over time ADR tends to move in line with prices and wages in the wider economy. As with room demand, long-run trends are also included as well as short-run dynamics. Specifically long-run dynamics ensure that real inflation adjusted ADR returns to long-run trends over the medium to long-run outlook. In the short-run the relationship between ADR and occupancy is crucial. The lag between changes in occupancy and ADR has been estimated for each market, with different lag timing identified for periods of rising and falling occupancy. With falling occupancy the effect on ADR is almost immediate while there is typically a lag of 6-12 months at other times. The level of occupancy relative to that market's long-run average is also an important factor in determining ADR. For example, falling occupancy but at a historically high level will not have a significant impact on ADR. Similarly rising occupancy will not have as large effect on ADR
if occupancy is at a historically low level.

Economic Supply
Economic supply assumes no temporary closures and accounts for all available hotel rooms. For the purpose of forecasting, economic supply was calculated by using the room supply data for the month of March 2020 and is then multiplied by the days in the corresponding months. Economic supply reflects some gradual property openings in future periods but does not take into account potential permanent closures. Economic supply is the denominator in determining economic occupancy. Historical reporting supply details can be found here: https://str.com/sites/default/files/faq_covid_april2020.pdf. Forecasted reporting supply has been benchmarked to known temporary closures. Historical estimates may vary from STR Trend reports because this analysis assumes some properties currently categorized as temporarily closed may ultimately close permanently. Increased reporting supply growth in 2021 assumes properties reopening.

*Courtesy of Tourism Economics

Appendix B: Net Promoter Score

What is it?
Straightforward metric that measures overall satisfaction and intent to recommend

How is it calculated?
"Would you recommend this _____ to a friend or a colleague?"
- Those rating from 0 to 6 are classified as **detractors**
- Those rating 7 or 8 are classified as **passive**
- Those rating 9 or 10 are classified as **promoters**

Why is measuring NPS important?
High satisfaction with travel experiences is critical to achieving increased visitor spending, longer stays, repeat visits and word of mouth referrals. It is reasonable to expect incremental returns with the achievement of higher NPS scores.

*Courtesy of Tourism Economics