

January 2023



COMPREHENSIVE STUDY OF VISITATION TO MARYLAND'S CHESAPEAKE BAY REGION

Final Report of Research Findings, Analysis & Recommendations



Comprehensive Study of Visitation to Maryland's Chesapeake Bay Region

Table of Contents

Executive Summary	5
CBR Visitor Volume & Visitation Patterns	10
Visitor Economic Impact Assessment	22
CBR Visitation By County	29
Visitor Profile & Assessment	44
CBR Travel Intent (Out-of-market travelers)	76
Additional Insight & Recommendations	97
Appendix	102
About Rockport Analytics	107

Background & Methodology

About the Study

This research was commissioned by the Maryland Office of Tourism Development (MOTD) in partnership with the National Park Service (NPS). The study was conducted by Rockport Analytics, an independent market and economic research firm. The goal of the analysis was to gain a comprehensive understanding of visitation to the Chesapeake Bay Region (CBR) in Maryland, specifically:

- (1) To quantify visitor volume to MD Chesapeake Bay Region
- (2) To profile recent visitors to Chesapeake Bay Region and better understand their behavior, attitudes & preferences
- (3) To understand potential traveler intent and better position MOTD's marketing efforts
- (4) To understand CBR visitor spending and its economic impact on the Chesapeake Bay Region and the state of Maryland

Findings from the analysis will help to optimize the return on investment of scarce state and local marketing and planning resources by better targeting visitors and creating meaningful and compelling campaigns to attract those to the region that will provide the greatest economic benefit to the state. The economic impact results will also provide stakeholders a better understanding of the importance of the Chesapeake Bay Region as a tourism asset and the CBR visitor economy's role in broader economic development.

Visitation Analysis Methodology

The visitation analysis was conducted to estimate Chesapeake Bay Region visitor volume, understand key CBR visitor origin/destination markets and assess the economic impact that visitation has on the Chesapeake Bay Region and the state of Maryland. Several data inputs/sources were triangulated to derive our visitor estimates and economic impact results. These include:

- (1) Geolocation data from Near – a leading data intelligence platform on people, places and products
- (2) MOTD & Tourism Economics reported visitor volume and spending estimates by county
- (3) Results from DK Shifflet/MMGY's TRAVEL PERFORMANCE/Monitor™ (via TraveLab)
- (4) A proprietary survey field by Rockport to recent Chesapeake Bay Region visitors

Background & Methodology

In-Market (Visitor Profile & Analysis) Survey Methodology

The in-market component of the research was conducted to better understand the profile, travel behavior, and preferences of travelers who have recently visited the Chesapeake Bay Region. The research included responses from both an in-person intercept component and an online survey. The intercept surveys were fielded over three different weekends in six different locations across the region: Annapolis, North Beach, Solomons Island, St. Michaels, Havre De Grace and Kent Island.

The online survey included responses from an online panel as well as those from MOTD and MOTD partner distribution lists. Potential respondents were qualified as having traveled to the Chesapeake Bay Region over the past two years. The visitor had to have traveled at least 50 miles one way to reach their destination in the Chesapeake Bay Region. The goal was to understand the entire domestic visitor opportunity for the CBR, so responses were targeted from actual visitors in all 50 states. Data was collected from 40 U.S. states, the District of Columbia, and several international respondents. To ensure we had an analyzable sample of key CBR origin markets, we oversampled potential visitors within the regional market. Data was collected from September 3rd to October 14th, and in total, 1,133 responses were collected. The overall margin of error in the survey results is +/- 2.9% at a 95% confidence interval.

Out-of-Market (Travel Intent) Survey Methodology

The out-of-market component of the research was conducted to better understand the travel intent, preferences and market potential for travelers who have not recently visited the Chesapeake Bay Region. The research included fielding a survey to an online panel of respondents. This panel was qualified as not having traveled to the Chesapeake Bay Region over the past two years. To qualify, these potential travelers must have also taken a trip for leisure purpose over the last year or plan to take a trip for leisure purpose over the next year. The goal was to understand the entire domestic visitor opportunity for the CBR, so responses were targeted from potential visitors in all 50 states. To ensure we had an analyzable sample of key CBR origin markets, we oversampled potential visitors within the regional market. Data was collected from September 6th to October 14th, and in total, 1,195 completed responses were collected. The overall margin of error in the survey results is +/- 2.8% at a 95% confidence interval.



VISITATION TO MARYLAND'S CHESAPEAKE BAY REGION EXECUTIVE SUMMARY

Executive Summary

Visitor Volume, Visitation Patterns, Spending & the Economic Impact of Tourism to the CBR

- **An estimated 8.9 million visitors came to Maryland's Chesapeake Bay Region in 2021.** Those visitors made an estimated 11.0 million county visits (an average of 1.2 counties per visitor) on their trip to the region. **On average visitors stayed 1.8 days in the region.** This differs from the average length of stay of 2.5 nights reported by survey respondents, but survey averages could be biased by a higher survey participation rates of overnight visitors. Survey responses also comprised visits in both 2021 and 2022 and average length of stays were higher in 2022.
- **Nearly 77% of visitors came from the 8-state/district region¹.** Leading the way in visitor volume were MD (22%), PA (14%), VA (14%) and DE (13%). The 23% of visitors from outside of the region came from a diversity of states. Top non-regional origin markets include Florida (4%), North Carolina (3%), and Texas, Georgia, and South Carolina (1% each).
- **Top DMAs of visitor origin included** Washington DC/Hagerstown MD; Salisbury, MD; Philadelphia, PA; Baltimore, MD; and New York, NY. **There were significant differences in the origin DMAs of visitation to various CBR counties, towns and sub-regions** (e.g., eastern shore vs. western shore).
- **Top town destinations within the Chesapeake Bay Region included:** Baltimore City (2.3 million visitors), Annapolis (1.9 million visitors), and Havre De Grace (780,000 visitors) on the western shore and Salisbury (522,000 visitors), Chesapeake City (491,000 visitors), Leonardtown (483,000 visitors), and St. Michaels (430,000 visitors) on the eastern shore.
- **On average, visitors to the CBR spent \$1,056 per person per trip on their stay in the region.** This includes \$285 on lodging, \$211 on food and beverage, \$100 on recreation, \$130 on attractions, \$160 on shopping, \$150 on ground transportation, and \$20 on other items.
- **Tourism to Maryland's Chesapeake Bay Region had a significant economic impact on the state and sub-regions of the state** in 2021, supporting 58,683 Maryland jobs, generating \$1.94 billion in paid wages, adding \$3.2 billion to Gross State Product (GSP) and generating state and local tax revenue of \$610 million.

Executive Summary (continued)

Visitor Profile & Travel Preferences

- **Visitors to the Chesapeake Bay Region had average incomes (\$112,000) significantly above the 2021 national average (\$70,784).** Visitors tend to be well-educated with 74% holding a bachelors degree or greater. Two-thirds of CBR visitors were married and 59% have children at home under the age of 18. Millennials (current age 26-41) made up 68% of visitors to the region.
- **On average, CBR travel party size was 3.1. Two-thirds of visitors traveled with a partner or spouse and one-third traveled with children under the age of 18.** According to the survey results, visitors spent an average of 2.5 nights in the region, but as previously noted, this number is likely upwardly biased by an over-response of overnight visitors and a combination of 2021 and 2022 responses (analysis of geo-location data implies an average LOS of 1.8 days in 2021).
- **Over half (51%) of visitors traveled to the region in their personal automobile** with 18% arriving by rental car, 14% by RV and 15% arriving by air. **Most (54%) overnight visitors stayed at a hotel or motel** and 11% stayed with friends or relatives (VFR). The remainder stayed at short-term vacation rentals (STVRs), cabins, RVs or at a traditional Bed & Breakfast.
- **In order to better understand key drivers of visitation to the Chesapeake Bay Region, Rockport developed traveler segments around key attitudes and traveler preferences.** These segments were developed by conducting factor analysis on responses from both the in-market and out-of-market samples to better understand the underlying factors motivating travelers to visit the Chesapeake Bay Region. There were seven traveler segments that were uncovered: **Experiencers (25% of visitors), Cultural Explorers (17%), Outdoor Enthusiasts (17%), Footloose Escapists (13%), Familiarity & Value (10%), Family First (11%) and Rest & Relaxation (7%).**

Executive Summary (continued)

Visitor Profile & Travel Preferences (continued)

- **One-quarter of visitors reported that spending time with family and friends was the primary reason for traveling to the CBR.** Over a third of those visitors (38%) were visiting family and friends (VFR); the other 62% were likely traveling with family or friends. Other primary drivers for visiting the CBR include experiencing the Bay's nature, ecology or wildlife (14%), escaping the stress and demands of daily life (13%), and experiencing the Bay's food/culinary offerings (11%).
- **The most popular activities for visitors of the Chesapeake Bay Region included** dining at a local establishment/enjoying local seafood (48%), shopping (38%), visiting CBR towns (37%), outdoor physical activities (36%), and sightseeing/photography (34%).
- **Internet searches were the most-used source of information (37%) in planning their trip to the CBR.** Recommendations from family, friends, colleagues (35%), previous visit/prior knowledge (28%), travel guides/brochures (24%), social media (23%), trip review websites (23%), and the Visit Maryland website (22%) were also important planning resources for visitors.
- Over half (57%) of visitors to the Chesapeake Bay Region are aware of **Chesapeake Bay Storyteller Tours** but only 7% of visitors reported taking a tour. Visitors' familiarity of **Chesapeake Bay Gateways & Watertrails Network Sites** was slightly higher at 61% and just over half (51%) reported that they had visited a site.

Travel Intentions & Preferences of US Travelers¹ Who Have Not Recently Visited the Chesapeake Bay Region

- **Nearly half (45%) of all travelers have considered travel to Maryland's Chesapeake Bay Region.** Not surprisingly, the proportion of regional² travelers who have considered a trip to the CBR (55%) is significantly higher than the proportion of non-regional travelers considering a trip (41%).

¹To qualify as a traveler respondents had to have taken a leisure trip over the last year or be planning to take a leisure trip over the next year.

²Regional Travelers include those from DC, DE, MD, NJ, NY, PA, VA, WV

Executive Summary (continued)

Travel Intentions & Preferences of US Travelers Who Have Not Recently Visited the Chesapeake Bay Region (continued)

- Those who have considered a trip to Maryland's Chesapeake Bay Region are **more likely to be frequent travelers** (having taken at least three trips in the last year). **These travelers are also more likely to be the primary decision makers** when planning leisure travel, and they are more likely to have children under 18 at home.
- Most travelers selected one of two primary reasons that they typically take a leisure trip: **to either spend time with family and friends (38%) or to escape the stress of daily life (31%)**.
- There is a significantly higher proportion of travelers among those who have considered travel to the CBR that take a trip primarily to **experience part of the world they have never seen before, experience local culture/history, or to experience nature, ecology and wildlife**.
- **There were a diversity of factors identified that would draw potential visitors to Maryland's Chesapeake Bay Region**. The top reasons that travelers mentioned that they may be motivated to visit the Chesapeake Bay Region were **local seafood, walkable waterfront towns, and abundant coastline and beaches**.
- **The top deterrent for considering a trip to the CBR is not knowing enough about the area**. This is particularly true for non-regional travelers with over one-third citing this as a deterrent. Non-regional travelers, not surprisingly, are also more likely to be deterred by the distance to, and cost of, traveling to the CBR. Regional travelers are less likely to list deterrents as non-regional travelers but there are still many who feel they don't know enough about the area (27%). **A higher proportion of regional travelers don't feel the CBR offers what they need in a travel experience (15%) or that there are not enough activities to keep their families busy (9%)**.



VISITATION TO MARYLAND'S CHESAPEAKE BAY REGION

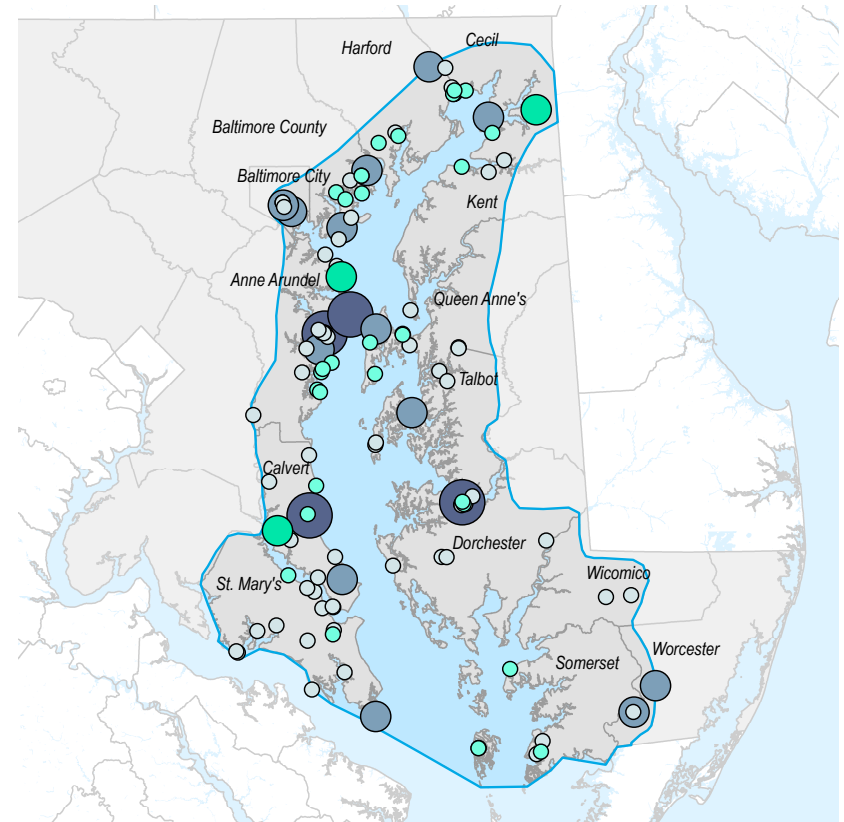
CBR VISITOR VOLUME & VISITATION PATTERNS

Defining Maryland's Chesapeake Bay Region

In order to assess visitor volume and analyze visitation patterns to the Chesapeake Bay Region (CBR), we first had to define the geographic area for our assessment. The map to the right provides a general illustration of the area selected for our analysis. This area includes 13 counties along with Baltimore City. These counties are included either in their entirety, or in most cases, in-part, specifically including the proportion of the county adjacent to (or closest to) the Chesapeake Bay.

In order to evaluate specific areas of the CBR, we also geofenced sub-areas of the region. This includes separately analyzing visitation to each county (or portion of a county) that falls within the region, along with 19 quintessential Chesapeake Bay towns spanning both the eastern and western shores of the region.

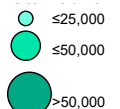
Lastly, we geofenced and evaluated 123 points of interest (POIs) throughout the CBR (as displayed on the map to the right). This includes 92 of the National Park Service (NPS) Chesapeake Bay Gateways and Watertrails Network sites located within the region. The Chesapeake Bay Gateways and Watertrails Network is a system of over 170 sites located within the Chesapeake Bay Region. The Network tells the story of the connections between people and nature in the Chesapeake region through its historic sites and communities, trails, parks, wildlife refuges, maritime museums, and more.¹



Visitor Volume
Chesapeake Bay Gateways
and Watertrails Network sites



Visitor Volume
State & County Parks &
Other Public Lands

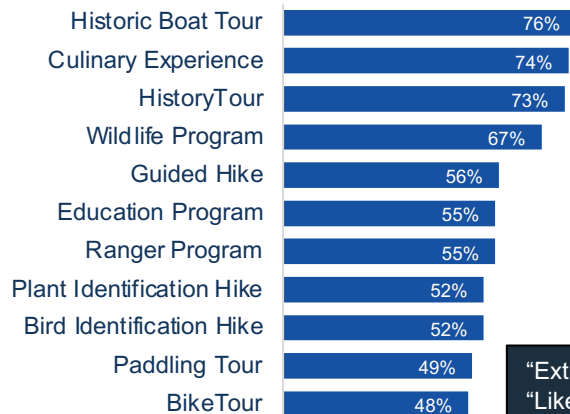


¹<https://www.nps.gov/articles/gateways.htm>

Chesapeake Bay Gateways and Watertrails Network Sites

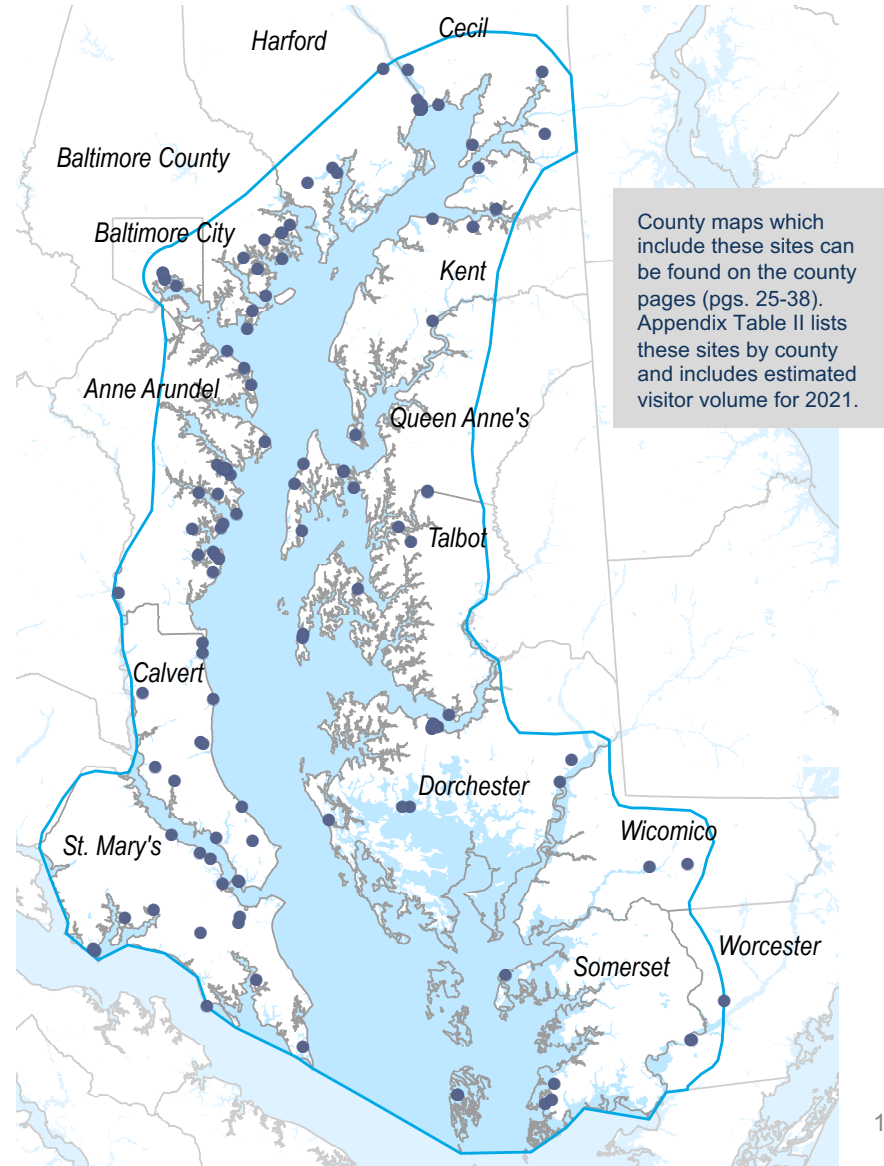
The 92 National Park Service Gateways and Watertrails Network Sites that are within the Chesapeake Bay Region provide many opportunities for visitors to explore, experience, and appreciate all the CBR has to offer. There are sites in every county in the region, and they include museums, parks, wildlife refuges, visitor centers, a city dock, and more.

To assess what might draw travelers to visit these sites, out-of-market travelers were asked how likely they would be to visit one of the Chesapeake Bay Gateways and Watertrails Network sites if it offered one of the programs below.



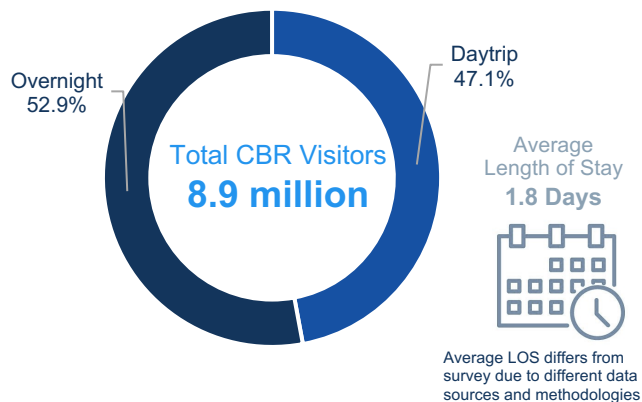
Q: How likely would you be to visit one of the Chesapeake Bay Gateways and Watertrails Network sites if they offered these programs?
N=1135

"Extremely Likely" or
"Likely" responses

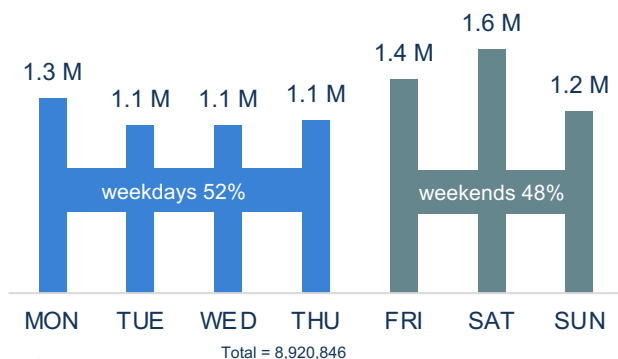


Maryland's Chesapeake Bay Region Welcomed 8.9 Million Visitors in 2021

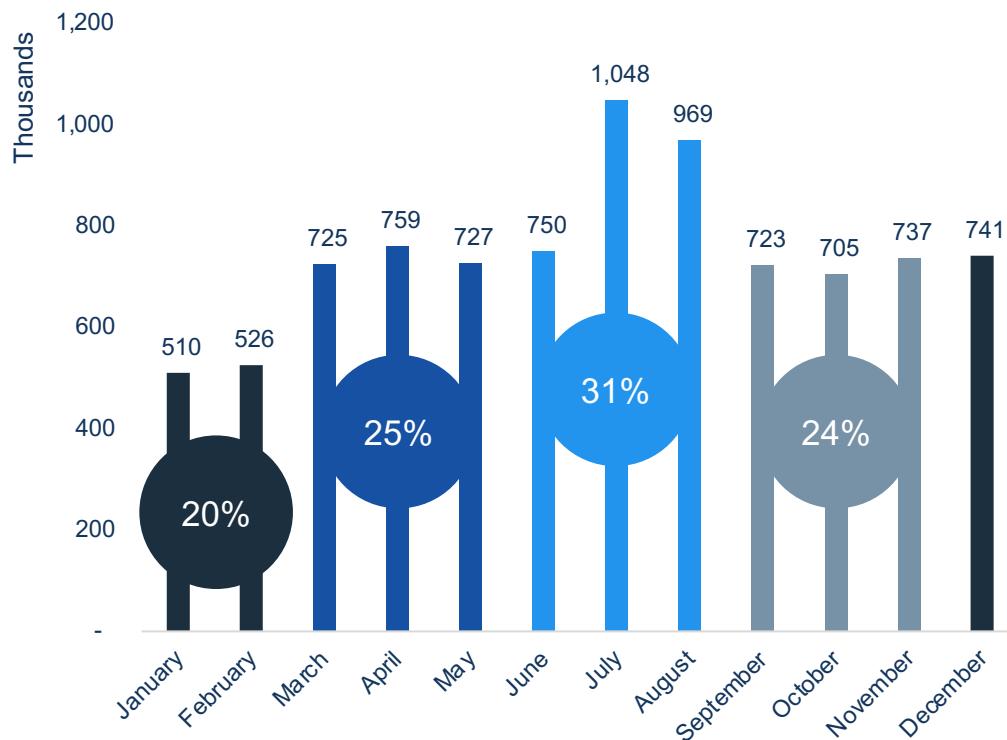
A total of 8.9 million visitors came to the Chesapeake Bay Region in 2021. These visits were evenly split between day trips (47.1%) and overnight stays (52.9%) and the average length of stay was 1.8 days. While weekend travel drives a lot of visitor volume to the region, trips starts were well distributed with over half of visitors beginning their trip on a Monday, Tuesday, Wednesday or Thursday. Summer was the dominant season for travel to the CBR, but the shoulder seasons of spring and fall were relatively strong as well, making up 25% and 24% of 2021 visitor volume, respectively.



Estimated CBR Visitor Volume by Start Day of Trip



Estimated CBR Visitor Volume By Month



Sources: Rockport Analytics, Near

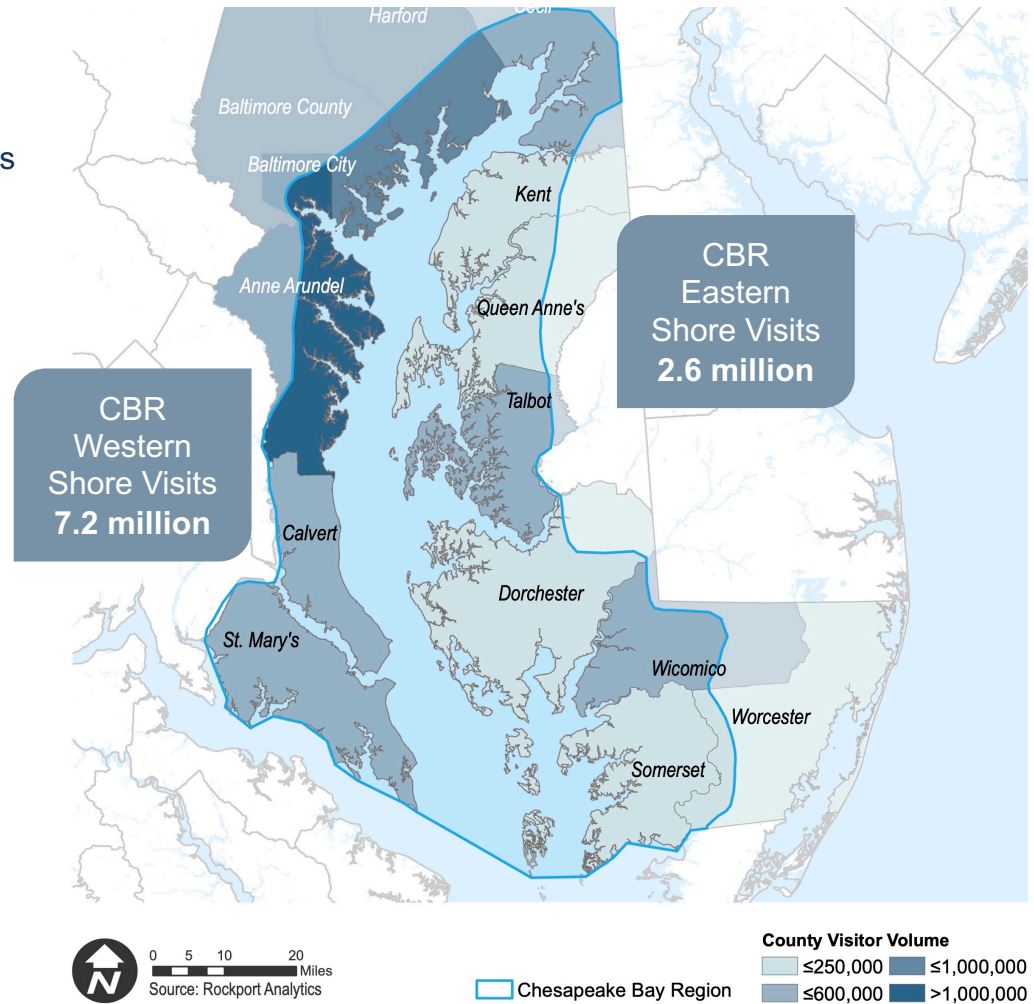
Total = 8,920,846

Visitation to the Chesapeake Bay Region

Distributed Across MD Counties

The 8.9 million CBR visitors included an estimated 10.3 million county visitors – with roughly 1.2 counties visited on average. The visits were widely distributed throughout the region with 2.6 million visits to eastern shore counties and 7.7 million visits to counties on the western shore. Anne Arundel County & Baltimore City welcomed the largest number of CBR visitors in 2021, nearly 5 million combined.

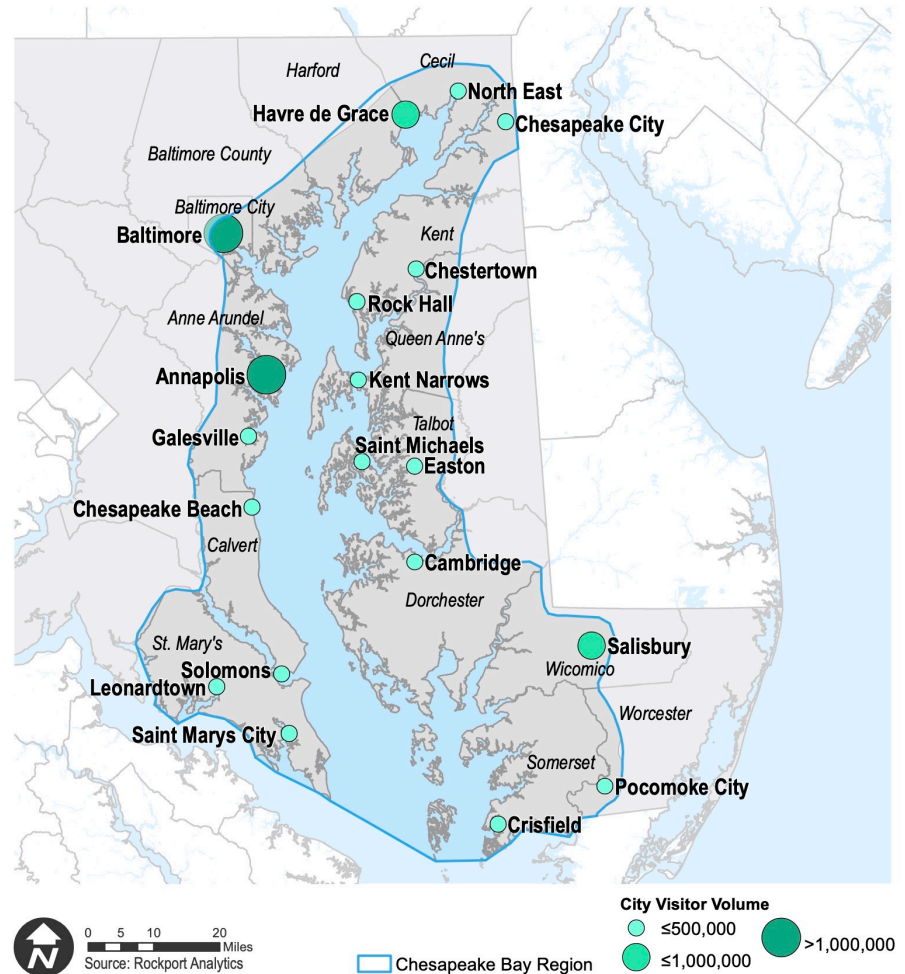
County	2021 Volume
Anne Arundel	2,730,701
Baltimore City	2,254,541
Baltimore County	835,815
Calvert	446,144
Cecil	591,879
Dorchester	205,868
Harford	817,315
Kent	196,723
Queen Anne's	247,547
Somerset	118,029
St. Mary's	593,669
Talbot	516,399
Wicomico	529,037
Worcester	184,209
Total	10,267,877



Towns Throughout the Chesapeake Bay Region are a Big Draw for Visitors

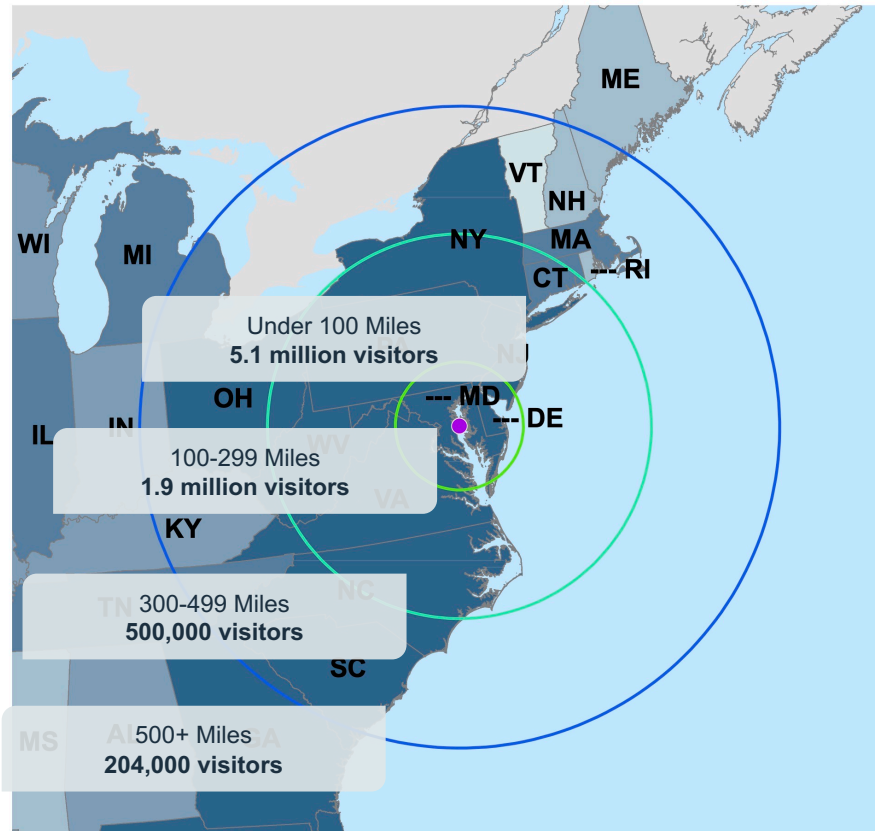
An estimated 10.1 million travelers visited one of the 19 Chesapeake Bay towns included in our analysis. More than 41% of travelers visited Annapolis and/or Baltimore on their trip. Other popular towns included Havre de Grace, Salisbury, Chesapeake City, Leonardtown, and St. Michaels.

Town	2021 Volume
Annapolis	1,919,269
Baltimore	2,254,541
Cambridge	204,742
Chesapeake Beach	307,113
Chesapeake City	490,874
Chestertown	163,794
Crisfield	102,371
Easton	409,484
Galesville	409,484
Havre de Grace	780,983
Kent Narrows	225,216
Leonardtown	483,330
North East	409,484
Pocomoke City	159,699
Rock Hall	143,319
Salisbury	522,092
Solomons	368,535
St. Mary's City	359,564
St. Michaels	429,958
Total	10,143,851

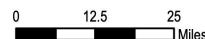
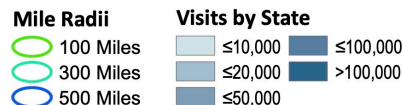
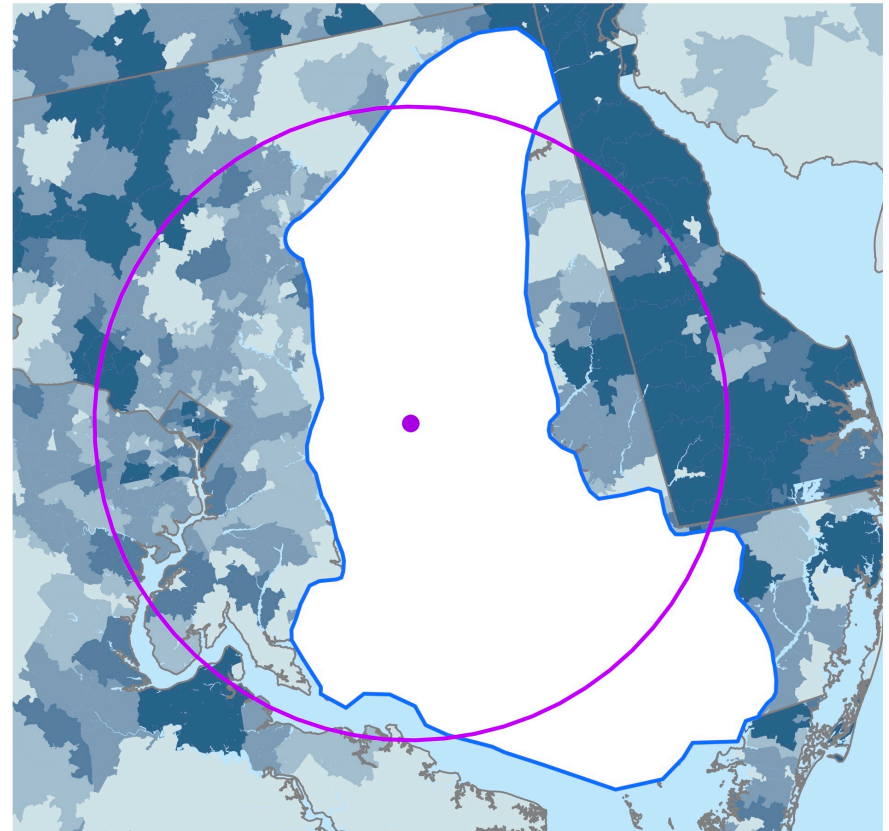


The Chesapeake Bay Attracts Visitors From Within the State, Regionally & Nationwide

Chesapeake Bay Region:
Visitors By Distance Traveled (2021)



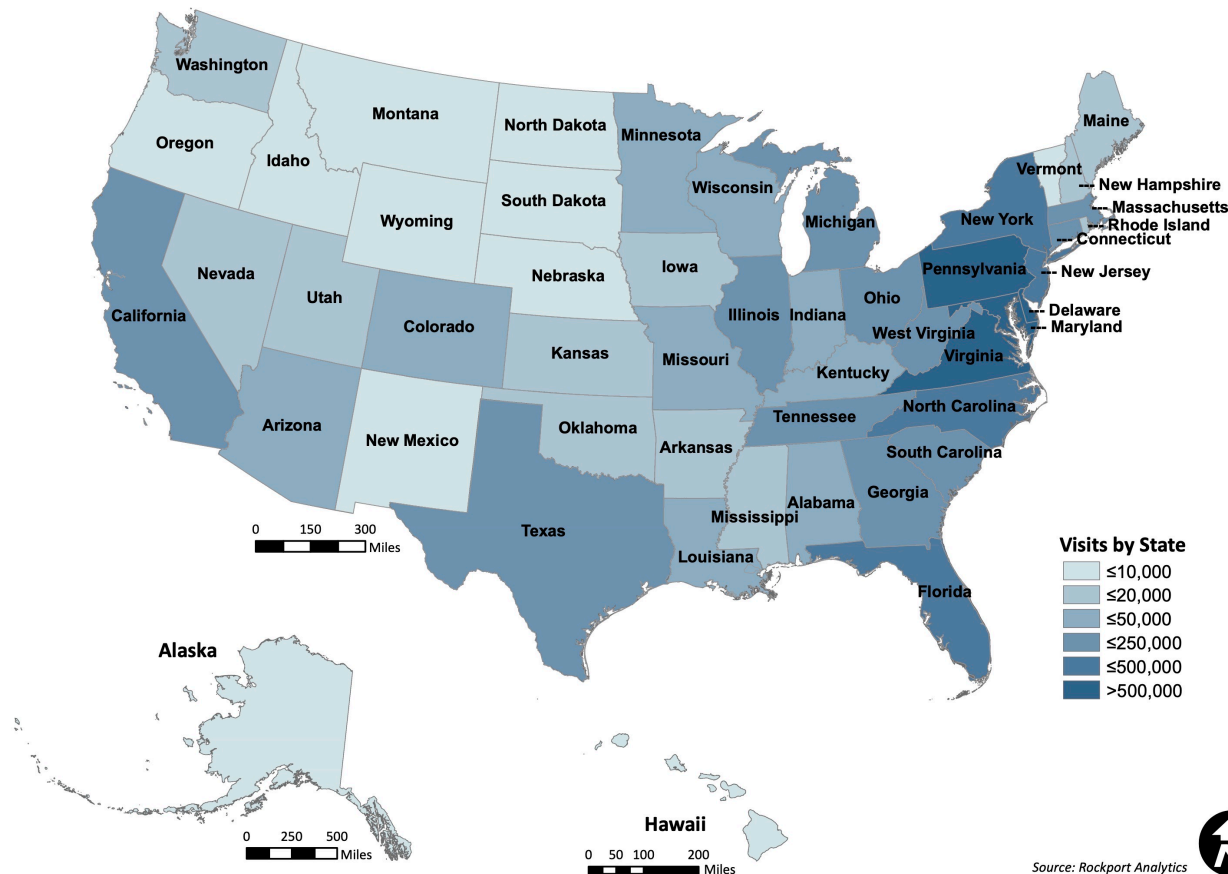
Chesapeake Bay Region:
Visitors By Zip Code of Origin (2021)



Regional Travelers Made up the Majority of Visitor Volume in 2021

In 2021, nearly 77% of visitors came from the 8-state/district region that includes MD, VA, PA, DE, NJ, NY, WV and DC. There were nearly two million in-state visitors to the region, those that came to the CBR from more than 50 miles away. Top origin states outside of the region included Florida, North Carolina, Texas and Georgia.

Estimated Visits by State



**Top 20 CBR
Visitor States of Origin**

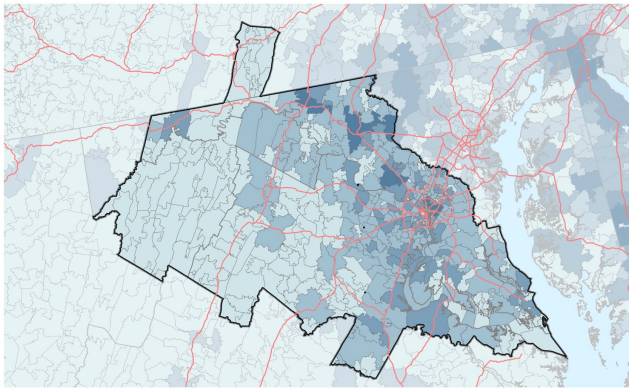
State	2021 Visitor Volume	% of Total
Maryland	1,980,387	22%
Pennsylvania	1,264,475	14%
Virginia	1,234,870	14%
Delaware	1,198,270	13%
New Jersey	412,479	5%
Florida	382,165	4%
New York	329,196	4%
DC	323,884	4%
North Carolina	265,322	3%
Texas	131,151	1%
Georgia	128,242	1%
South Carolina	123,550	1%
West Virginia	118,378	1%
Ohio	116,963	1%
Tennessee	82,275	1%
Illinois	73,556	1%
Massachusetts	71,980	1%
California	63,470	1%
Connecticut	54,939	1%
Michigan	50,216	1%
Other	515,078	6%
Total	8,920,846	100%

Source: Rockport Analytics

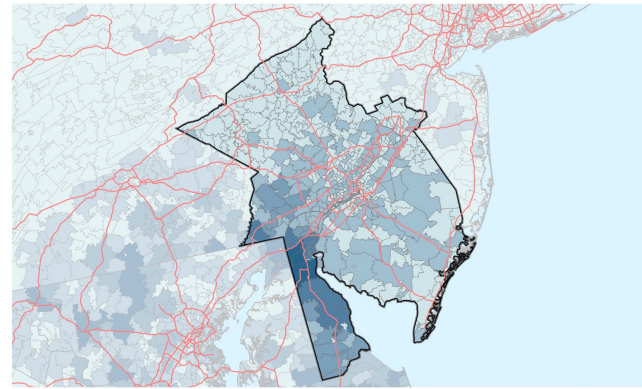
Significant CBR Visitor Volume Originates in the Top-4 Source Markets

Outside of Baltimore, the top-4 Chesapeake Bay Region Designated Market Areas (DMA)¹ of origin were Washington DC, Philadelphia, PA, Salisbury, MD and Harrisburg-Lancaster-Lebanon-York, PA. Visitors from these four DMAs comprised just over half (52.5%) of the volume to the CBR in 2021. The maps below highlight CBR visitor volume by home zip code within those four DMAs.

Washington DC (Hagerstown, MD): #1 Origin DMA

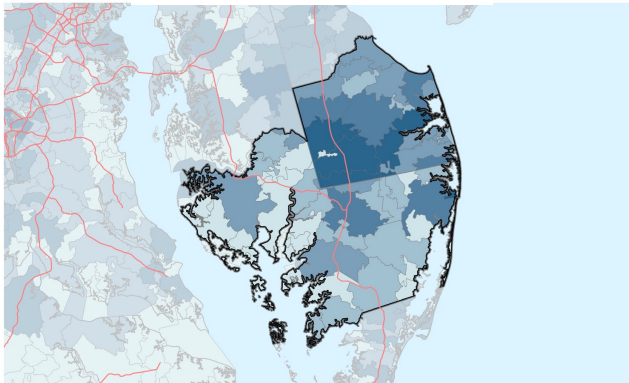


Philadelphia, PA: #2 Origin DMA

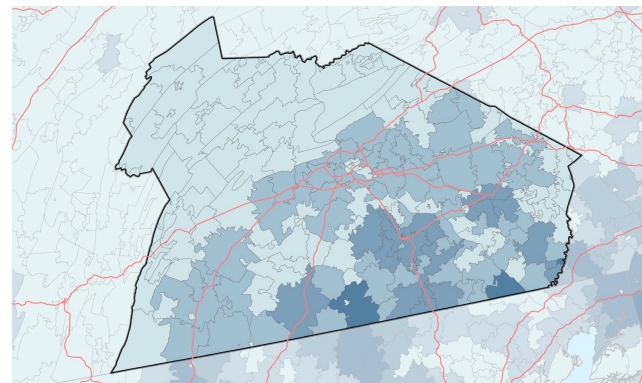


¹A DMA® region is a group of U.S. counties that form an exclusive geographic area based on the television viewing habits of the people residing in the county. The DMA® boundaries and data are owned by The Nielsen Company.

Salisbury, MD: #3 Origin DMA



Harrisburg-Lancaster-Lebanon-York, PA: #4 Origin DMA



Visits by ZIP Code



Sources: Rockport Analytics, Near

Differences in CBR Visitors' Origin DMAs: Western Shore Towns

While most CBR visitors traveled from the top-DMAs of origin in 2021, there are significant differences in the mix of origin markets when comparing different destinations within the Chesapeake Bay Region. Visitors to the western shore are significantly more likely to travel from Washington, DC, New York or Central PA. Towns at the northern end of the Bay like Havre de Grace and North East, are more likely to see visitors from Philadelphia. Towns on the southwestern shore like St. Mary's, Solomons Island and Leonardtown are significantly more likely to receive visitors from Baltimore.

Origin DMA	Destination =>	All Visitors	Western Shore	Annapolis	Baltimore	Chesapeake Beach	Galesville	Havre de Grace	Leonardtown	North East	Solomons	St. Mary's
Washington, DC (Hagerstown, MD)		21%	25%	29%	25%	38%	36%	16%	39%	6%	34%	39%
Salisbury, MD		13%	3%	4%	3%	3%	4%	3%	2%	2%	2%	2%
Philadelphia, PA		12%	11%	8%	10%	4%	3%	22%	2%	28%	4%	3%
Baltimore, MD		9%	5%	5%	3%	10%	9%	12%	13%	6%	15%	31%
New York, NY		6%	7%	6%	8%	2%	2%	8%	2%	7%	2%	1%
Harrisburg-Lancaster-Lebanon-York, PA		5%	7%	3%	8%	2%	4%	11%	1%	6%	2%	3%
Norfolk-Portsmouth-Newport News, VA		5%	2%	2%	2%	2%	1%	1%	4%	1%	3%	2%
Richmond-Petersburg, VA		2%	2%	2%	2%	2%	3%	1%	2%	1%	2%	2%
Pittsburgh, PA		1%	1%	1%	2%	2%	2%	1%	1%	1%	1%	1%
Atlanta, GA		1%	1%	2%	2%	1%	1%	1%	1%	1%	1%	0%
Orlando-Daytona Beach-Melbourne, FL		1%	1%	2%	1%	2%	3%	1%	2%	2%	2%	1%
Raleigh-Durham (Fayetteville), NC		1%	1%	1%	1%	1%	0%	1%	2%	1%	1%	0%
Tampa-St. Petersburg (Sarasota), FL		1%	1%	2%	1%	2%	2%	1%	1%	1%	2%	0%
Wilkes Barre-Scranton, PA		1%	1%	1%	1%	1%	1%	1%	0%	1%	1%	0%
Boston, MA (Manchester, NH)		1%	1%	1%	1%	1%	1%	1%	0%	1%	1%	1%

Sources: Rockport Analytics, Near

Differences in CBR Visitors' Origin DMAs: Eastern Shore Towns

Travelers from Washington DC are significantly more likely to visit the Western Shore than Eastern Shore towns, although DC remains a top-4 origin market for ES destinations as well. Given their accessibility, Chesapeake City, Chestertown and Rock Hall are significantly more likely to draw visitors from Philadelphia. Note that the Salisbury, MD DMA stretches into Delaware and those coming from out-of-state are accounted for as new visitors into the market. Visitors for the Norfolk-Portsmouth-Newport News DMA are, not surprisingly, more likely to visit southeastern CBR destinations like Pocomoke City and Crisfield.

Origin DMA	Destination =>	All Visitors	Eastern Shore	Cambridge	Chesapeake City	Chestertown	Crisfield	Easton	Kent Narrows	Pocomoke City	Rock Hall	Salisbury	St. Michaels
Washington, DC (Hagerstown, MD)		21%	14%	21%	2%	15%	18%	21%	31%	6%	9%	10%	25%
Salisbury, MD		13%	29%	18%	3%	10%	16%	21%	10%	6%	4%	44%	10%
Philadelphia, PA		12%	14%	10%	74%	38%	7%	12%	16%	6%	54%	8%	17%
Baltimore, MD		9%	14%	24%	5%	7%	22%	19%	8%	9%	3%	13%	14%
New York, NY		6%	3%	4%	2%	5%	3%	2%	4%	3%	5%	3%	5%
Harrisburg-Lancaster-Lebanon-York, PA		5%	2%	2%	4%	4%	2%	3%	4%	2%	9%	1%	3%
Norfolk-Portsmouth-Newport News, VA		5%	9%	3%	1%	2%	13%	2%	1%	55%	1%	8%	2%
Richmond-Petersburg, VA		2%	1%	1%	0%	2%	1%	1%	2%	2%	0%	1%	1%
Pittsburgh, PA		1%	1%	1%	0%	1%	1%	1%	2%	0%	1%	0%	1%
Atlanta, GA		1%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Orlando-Daytona Beach-Melbourne, FL		1%	1%	1%	1%	1%	0%	1%	2%	0%	1%	0%	0%
Raleigh-Durham (Fayetteville), NC		1%	1%	1%	0%	0%	0%	1%	1%	1%	0%	1%	1%
Tampa-St. Petersburg (Sarasota), FL		1%	1%	1%	1%	1%	1%	1%	1%	0%	1%	1%	1%
Wilkes Barre-Scranton, PA		1%	1%	1%	0%	1%	1%	1%	1%	1%	1%	0%	1%
Boston, MA (Manchester, NH)		1%	0%	0%	0%	1%	1%	0%	1%	1%	0%	0%	1%

Sources: Rockport Analytics, Near

Visitation Patterns Differ Between Town Destinations Within the CBR

While summertime draws the largest share visitors (30.9%) to CBR towns, it drives an even larger seasonal share of visitors to quintessential waterfront towns like Rock Hall, Kent Narrows, St. Michaels and Galesville. These towns are also more likely to welcome visitors on the weekends. Conversely, towns less focused on the waterfront are more likely to receive relatively larger shares of visitors in the wintertime and during the week. Not surprisingly, towns with easier access (50-75 miles) from major population centers are more likely to draw day trippers.

	Winter	Spring	Summer	Fall	Daytrip	Overnight	Weekdays	Weekends
All Towns	19.6%	24.4%	30.9%	25.1%	48.9%	51.1%	52.4%	47.6%
Annapolis	16.7%	23.0%	33.0%	27.3%	50.5%	49.5%	46.4%	53.6%
Baltimore	20.2%	23.0%	29.9%	26.9%	48.3%	51.7%	54.6%	45.4%
Cambridge	19.1%	26.3%	32.0%	22.7%	46.5%	53.5%	51.9%	48.1%
Chesapeake Beach	19.6%	24.1%	33.4%	22.9%	43.4%	56.6%	46.3%	53.7%
Chesapeake City	12.6%	28.9%	39.1%	19.4%	72.4%	27.6%	36.3%	63.7%
Chestertown	19.2%	24.0%	30.7%	26.1%	45.5%	54.5%	50.9%	49.1%
Crisfield	16.1%	21.6%	34.6%	27.8%	38.6%	61.4%	52.4%	47.6%
Easton	20.4%	27.4%	30.3%	21.9%	51.0%	49.0%	54.1%	45.9%
Galesville	12.6%	25.1%	41.3%	21.0%	57.7%	42.3%	43.9%	56.1%
Havre de Grace	19.2%	28.2%	30.1%	22.4%	55.1%	44.9%	52.2%	47.8%
Kent Narrows	11.3%	27.0%	42.2%	19.5%	59.7%	40.3%	43.8%	56.2%
Leonardtown	20.8%	28.6%	27.1%	23.5%	47.0%	53.0%	55.8%	44.2%
North East	21.8%	28.5%	28.2%	21.5%	50.7%	49.3%	57.2%	42.8%
Pocomoke City	20.7%	28.9%	29.7%	20.7%	48.9%	51.1%	52.4%	47.6%
Rock Hall	7.9%	19.9%	48.8%	23.3%	42.8%	57.2%	39.5%	60.5%
Salisbury	21.6%	24.8%	29.0%	24.5%	47.0%	53.0%	53.2%	46.8%
Solomons	13.3%	23.4%	39.5%	23.8%	43.2%	56.8%	46.0%	54.0%
St. Mary's	17.5%	25.8%	23.9%	32.8%	55.9%	44.1%	48.2%	51.8%
St. Michaels	12.4%	22.2%	41.5%	23.9%	45.9%	54.1%	45.1%	54.9%

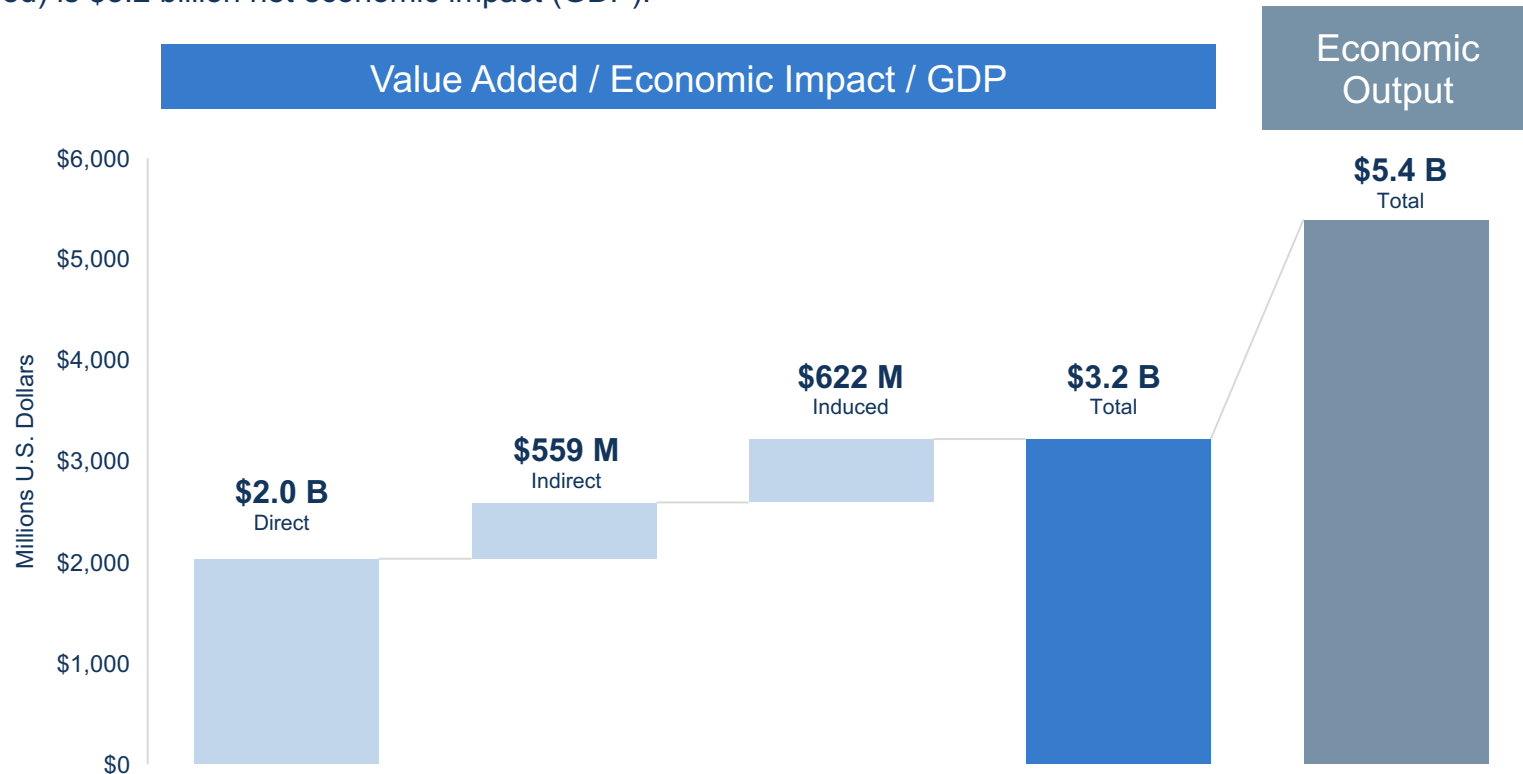


VISITATION TO MARYLAND'S CHESAPEAKE BAY REGION

VISITOR ECONOMIC IMPACT ASSESSMENT

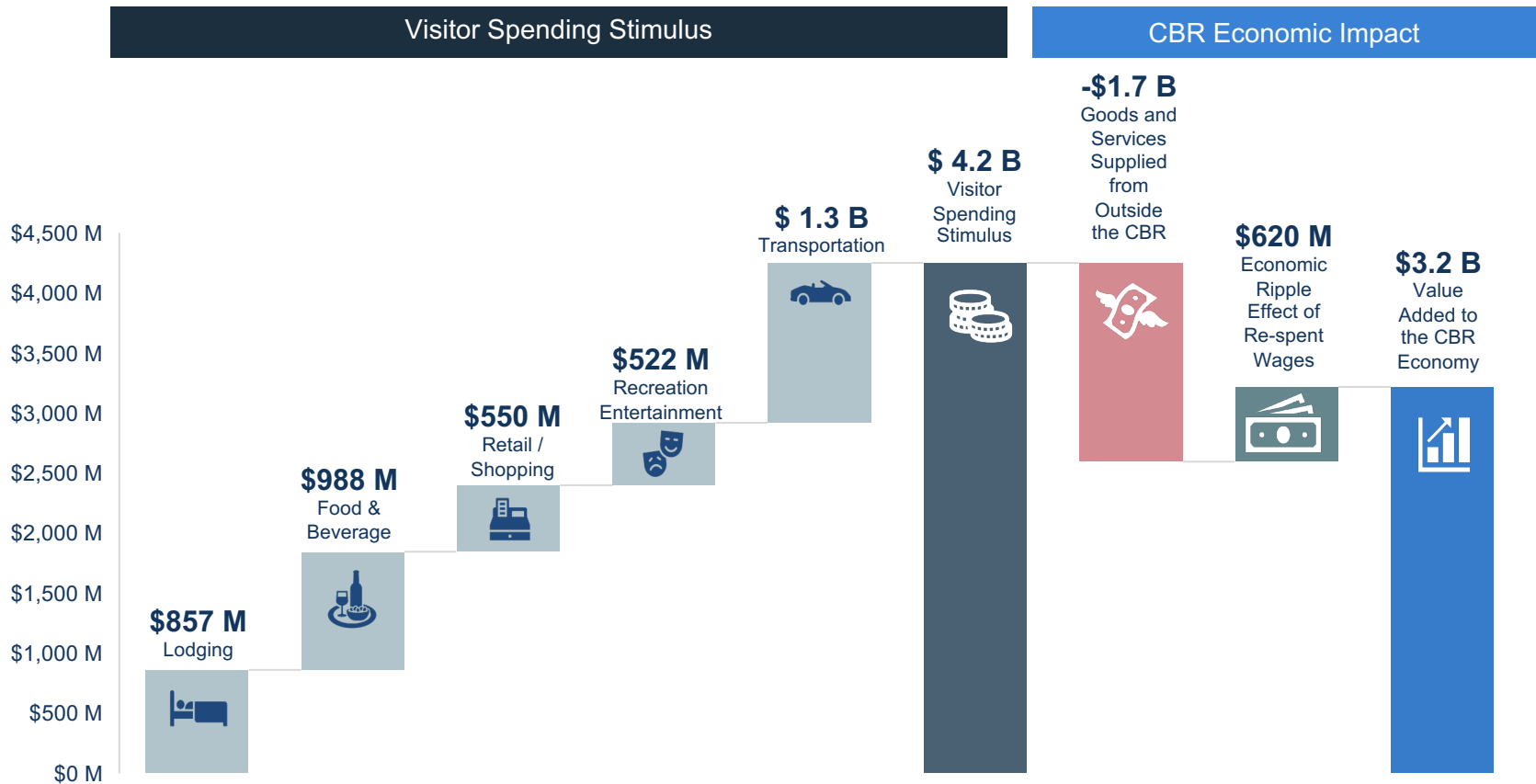
Value Added vs. Economic Output

Economic output measures the value of all sales of goods and services, including both the final purchases and intermediate input purchases. Value added accounts for only the value added along every step of the value chain, thus, not double-counting sales. Generally, we refer to value added as “economic impact” as this is truly the net impact on a region’s economy following some sort of stimulus, such as a festival event. Total economic impact consists of direct, indirect, and induced impacts. Direct impact includes net new dollars to businesses that directly serve visitors. Indirect impact is the benefit to the suppliers of the direct businesses, and induced impact includes money spent in the region by employees of the direct and suppliers’ businesses. The \$4.2 billion visitor spending in the Chesapeake Bay Region in 2021 generated \$5.4 billion in economic output, but when removing double-counted sales, the net new amount (value added) is \$3.2 billion net economic impact (GDP).



CBR Tourism Generated \$3.2 Billion in MD Gross State Product (GSP) in 2021

Visitors to MD's Chesapeake Bay Region spent \$4.2 billion on various goods and services in the state. This includes spending on lodging (\$857 million), F&B (\$988 million), retail goods (\$550 million), entertainment & recreation (\$522 million) and transportation (\$1.3 billion). This spending generated \$3.2 billion in net new value added to Maryland's economy. **This spending also generated \$610 million in state and local taxes which was enough to reduce each Maryland household's tax bill by \$266.**



2021 CBR Tourism Spending & Economic Impact Highlights

Tourism and Impact

\$4.2 Billion
Tourism Spending

\$857 Million
Lodging

\$988 Million
Food & Beverage

\$550 Million
Shopping

\$1.33 Billion
Transportation

\$522 Million
Entertainment and Recreation

\$3.2 Billion
Total Economic Impact

\$2.0 Billion
Direct

\$558 Million
Indirect

\$622 Million
Induced



Jobs and Wages

58,683
Total Traveler Spending Supported Jobs

44,957
Direct Jobs

6,245
Indirect Jobs

7,481
Induced Jobs

\$1.94 Billion
Total Wages



Tax Revenue Generated

\$469 Million
Total Federal Tax

\$208 Million
Social Security

\$152 Million
Personal Income

\$109 Million
Other Fed Taxes

\$610 Million
Total State and Local Tax

\$278 Million
Sales Tax

\$59 Million
Local Hotel Tax

\$273 Million
Other State & Local Taxes



A Multitude of Maryland Industries Benefited from CBR Visitation

Visitation to Chesapeake Bay Region generated \$3.2 billion in net new economic impact for the state of Maryland in 2021. The accommodations sector accrued more than \$510 million in direct economic impact and food services & drinking places accrued over \$410 million. The tourism supply chain and other downstream businesses (indirect & induced) benefited from an additional \$1.2 million in value added in 2021. These impacts flowed to a variety of sectors including professional services, finance & insurance, and health & social services.

2021 CBR Tourism: Economic Impact (Value Added/GDP)

Industry (NAICS)	Direct	Indirect	Induced	Total
<i>in thousands of dollars</i>				
Real Estate & Rental	\$385,425	\$142,864	\$171,445	\$699,733
Accommodations	\$510,725	\$488	\$269	\$511,482
Food Services & Drinking Places	\$410,420	\$4,102	\$12,555	\$427,077
Arts, Entertainment & Recreation	\$290,162	\$8,220	\$11,563	\$309,944
Retail Trade	\$176,129	\$12,432	\$74,097	\$262,658
Transportation & Warehousing	\$127,465	\$32,292	\$14,069	\$173,826
Professional Services	\$0	\$81,043	\$28,786	\$109,829
Health & Social Services	\$0	\$26	\$108,299	\$108,325
Finance & Insurance	\$0	\$53,999	\$45,462	\$99,461
Administrative & Waste Services	\$0	\$63,165	\$20,892	\$84,057
Other Services	\$0	\$27,020	\$34,037	\$61,057
Wholesale Trade	\$0	\$30,685	\$27,896	\$58,580
Management of Companies	\$0	\$32,198	\$4,486	\$36,683
Information	\$0	\$21,653	\$14,978	\$36,631
Construction	\$0	\$17,819	\$6,636	\$24,454
Utilities	\$0	\$13,070	\$4,889	\$17,959
Educational Services	\$0	\$1,039	\$9,501	\$10,539
Manufacturing	\$0	\$6,461	\$3,302	\$9,763
Ag, Forestry, Fish & Hunting	\$0	\$847	\$398	\$1,245
Government	\$0	\$22	\$275	\$296
Mining	\$0	\$128	\$120	\$248
Total	\$2,035,099	\$558,909	\$622,222	\$3,216,230

Visitation to the CBR Supported Over 58,000 Maryland Jobs in 2021

Visitors supported nearly 45,000 direct full- and part-time jobs in 2021. Direct jobs are represented in the businesses that directly support visitors to the region such as restaurants, hotels, transportation companies and retailers. Maryland business along the supply chain (indirect) of those businesses benefited from an additional 6,245 jobs, and downstream MD businesses (induced) benefitted from an additional 7,481 jobs in 2021.

2021 CBR Tourism: Economic Impact (Employment)

Industry (NAICS)	Direct	Indirect	Induced	Total
Food Services & Drinking Places	13,759	137	421	14,317
Arts, Entertainment & Recreation	7,819	300	226	8,345
Accommodations	7,777	7	4	7,789
Retail Trade	3,751	239	1,360	5,350
Transportation & Warehousing	4,495	481	207	5,182
Real Estate & Rental	1,609	1,003	447	3,058
Administrative & Waste Services	0	1,176	425	1,601
Health & Social Services	0	0	1,590	1,590
Professional Services	0	860	319	1,179
Other Services	0	344	791	1,135
Finance & Insurance	0	439	385	825
Wholesale Trade	0	186	169	355
Construction	0	225	85	310
Educational Services	0	45	259	304
Management of Companies	0	210	29	239
Information	0	141	69	210
Manufacturing	0	70	22	92
Ag, Forestry, Fish & Hunting	0	42	11	53
Utilities	0	27	11	38
Government	0	8	11	18
Mining	0	2	1	3
Total	44,957	6,245	7,481	58,683

Source: Rockport Analytics, IMPLAN

Total Wages Derived From CBR Visitation Reached \$1.9 Billion in 2021

In total, tourism wages generated by CBR visitors amounted to \$1.9 billion for Maryland workers. Wages are broken down into direct, indirect, and induced wages. Wages paid to Maryland employees directly supported by CBR tourism activity totaled \$1.29 billion. An additional \$316 million in wages were paid to employees of the Chesapeake Bay Region's tourism supply chain (indirect) and another \$334 million were wages re-spent in the region (induced).

2021 CBR Tourism: Employee Compensation

Industry (NAICS)	Direct	Indirect	Induced	Total
<i>in thousands of dollars</i>				
Food Services & Drinking Places	\$346,326	\$3,461	\$10,594	\$360,381
Accommodations	\$243,899	\$233	\$128	\$244,260
Arts, Entertainment & Recreation	\$194,555	\$6,808	\$6,598	\$207,961
Retail Trade	\$123,126	\$8,192	\$45,251	\$176,570
Real Estate & Rental	\$113,086	\$22,876	\$10,182	\$146,143
Transportation & Warehousing	\$98,178	\$26,411	\$10,068	\$134,656
Health & Social Services	\$0	\$24	\$96,986	\$97,011
Professional Services	\$0	\$61,528	\$21,998	\$83,526
Administrative & Waste Services	\$0	\$48,133	\$16,261	\$64,394
Finance & Insurance	\$0	\$32,782	\$25,791	\$58,573
Other Services	\$0	\$19,208	\$33,898	\$53,106
Wholesale Trade	\$0	\$16,379	\$14,891	\$31,270
Management of Companies	\$0	\$26,041	\$3,628	\$29,668
Information	\$0	\$13,516	\$5,376	\$18,892
Construction	\$0	\$13,593	\$5,133	\$18,726
Educational Services	\$0	\$1,012	\$8,941	\$9,953
Manufacturing	\$0	\$3,839	\$1,305	\$5,144
Utilities	\$0	\$3,472	\$1,334	\$4,806
Government	\$0	\$459	\$599	\$1,058
Ag, Forestry, Fish & Hunting	\$0	\$280	\$260	\$540
Mining	\$0	\$38	\$33	\$71
Total	\$1,286,393	\$316,465	\$334,388	\$1,937,246



VISITATION TO MARYLAND'S CHESAPEAKE BAY REGION

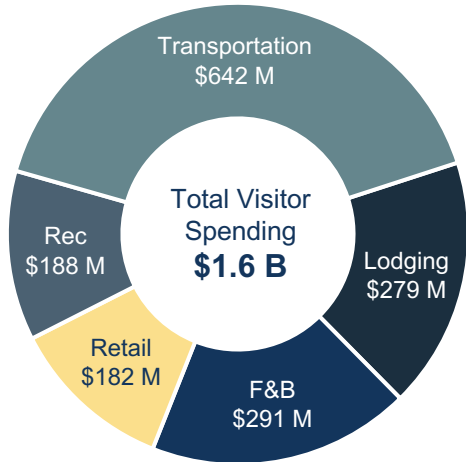
CBR VISITATION BY COUNTY

Chesapeake Bay Visitation by County:

Anne Arundel

Anne Arundel County welcomed **2.7 million** CBR visitors in 2021

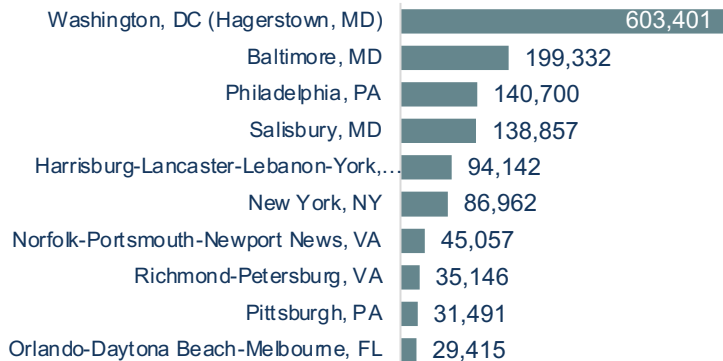
Anne Arundel CBR Visitor Spending



Note: category spending may not sum to the total due to rounding

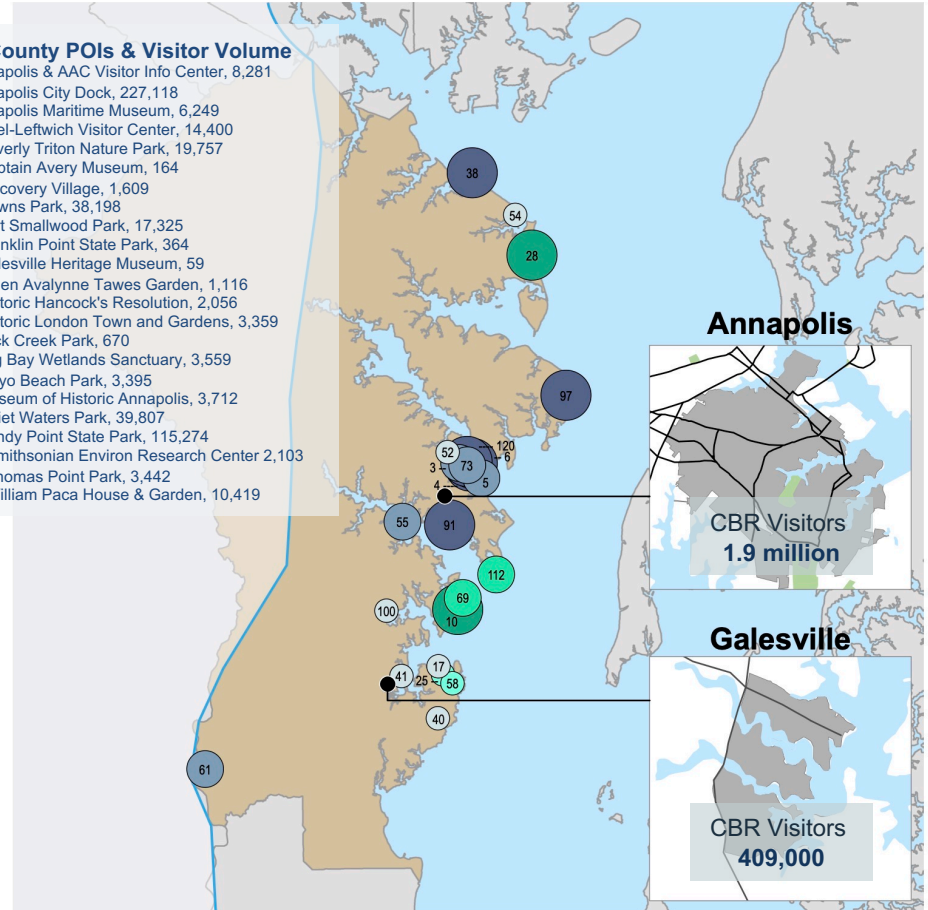
Average Length of Stay = 1.9 days

Anne Arundel Top-10 Origin DMAs (Visitor Volume)



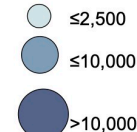
AA County POIs & Visitor Volume

- 3: Annapolis & AAC Visitor Info Center, 8,281
- 4: Annapolis City Dock, 227,118
- 5: Annapolis Maritime Museum, 6,249
- 6: Armel-Leftwich Visitor Center, 14,400
- 10: Beverly Triton Nature Park, 19,757
- 17: Captain Avery Museum, 164
- 25: Discovery Village, 1,609
- 28: Downs Park, 38,198
- 38: Fort Smallwood Park, 17,325
- 40: Franklin Point State Park, 364
- 41: Galesville Heritage Museum, 59
- 52: Helen Avalynne Tawes Garden, 1,116
- 54: Historic Hancock's Resolution, 2,056
- 55: Historic London Town and Gardens, 3,359
- 58: Jack Creek Park, 670
- 61: Jug Bay Wetlands Sanctuary, 3,559
- 69: Mayo Beach Park, 3,395
- 73: Museum of Historic Annapolis, 3,712
- 91: Quiet Waters Park, 39,807
- 97: Sandy Point State Park, 115,274
- 100: Smithsonian Environ Research Center, 2,103
- 112: Thomas Point Park, 3,442
- 120: William Paca House & Garden, 10,419

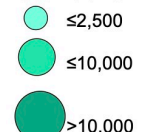


Chesapeake Bay Region

Chesapeake Bay Gateways and Watertrails Network Sites Visitor Volume



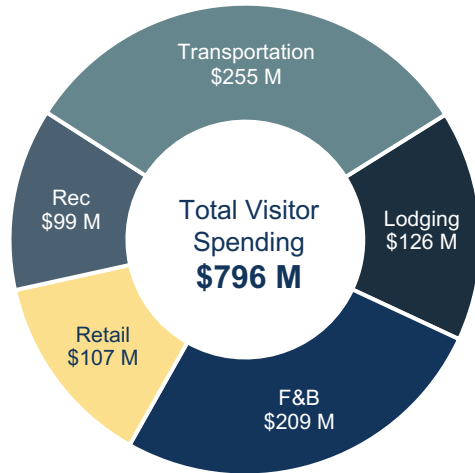
State and County Parks and Other Public Lands Visitor Volume



Chesapeake Bay Visitation by County: Baltimore City

Baltimore welcomed **2.3 million** CBR visitors in 2021

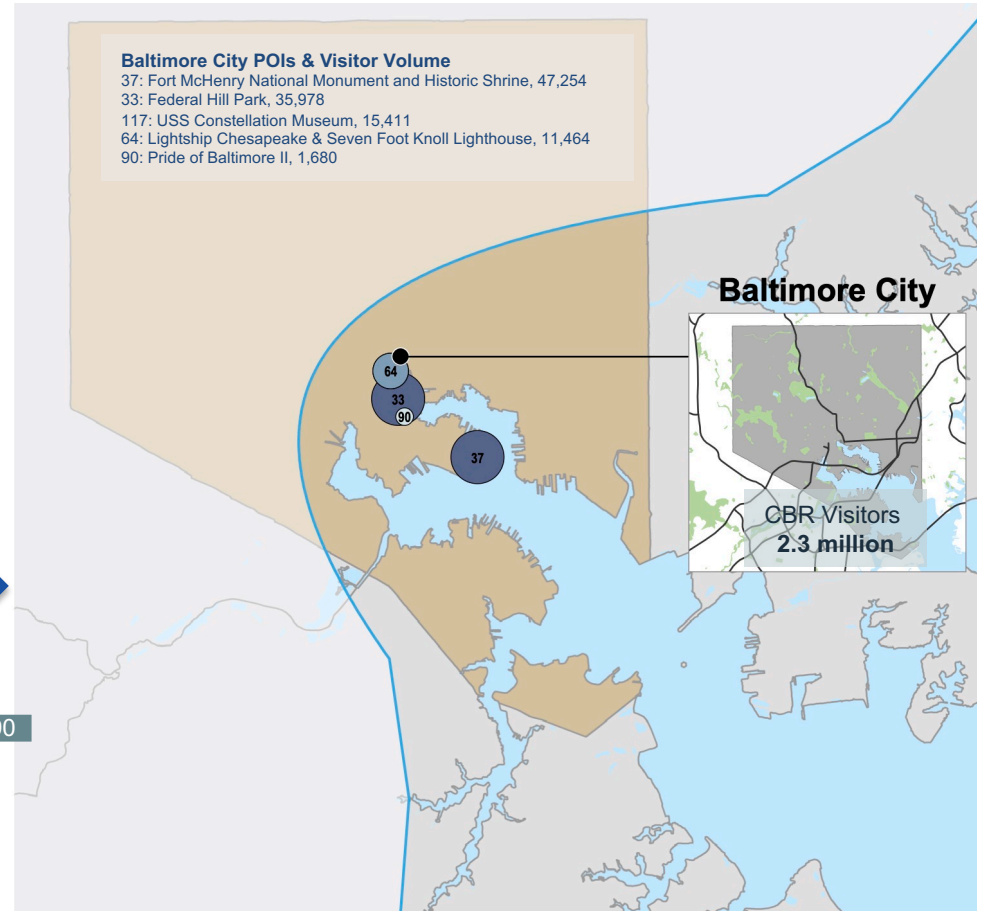
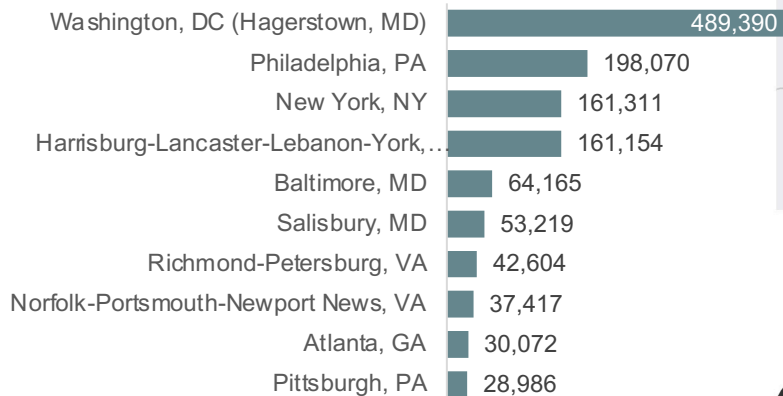
Baltimore City CBR Visitor Spending



Note: category spending may not sum to the total due to rounding

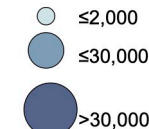
Average Length of Stay = 1.7 days

Baltimore City Top-10 Origin DMAs (Visitor Volume)

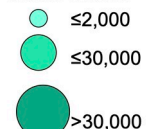


Chesapeake Bay Region

Chesapeake Bay Gateways and Watertrails Network Sites Visitor Volume



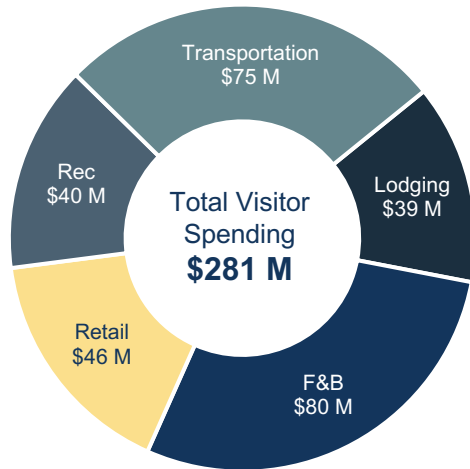
State and County Parks and Other Public Lands Visitor Volume



0 1.25 2.5 Miles
Source: Rockport Analytics

Chesapeake Bay Visitation by County: Baltimore County

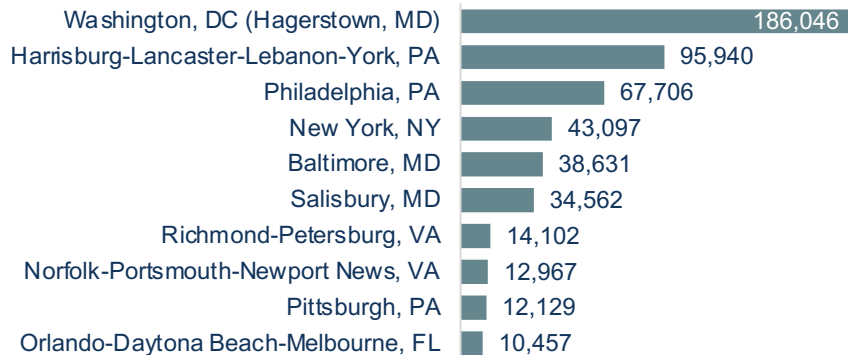
Baltimore County CBR Visitor Spending



Note: category spending may not sum to the total due to rounding

Average Length of Stay = 1.8 days

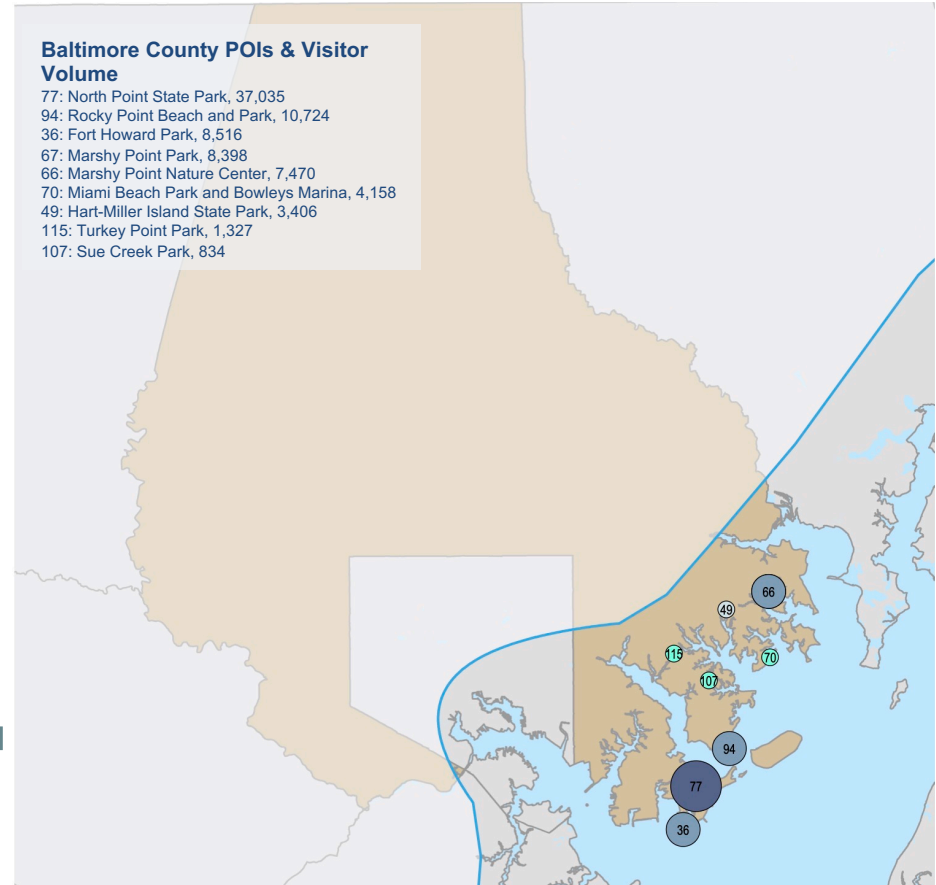
Baltimore County Top-10 Origin DMAs
(Visitor Volume)



Baltimore County welcomed **836,000** CBR visitors in 2021

Baltimore County POIs & Visitor Volume

77: North Point State Park, 37,035
94: Rocky Point Beach and Park, 10,724
36: Fort Howard Park, 8,516
67: Marshy Point Park, 8,398
66: Marshy Point Nature Center, 7,470
70: Miami Beach Park and Bowleys Marina, 4,158
49: Hart-Miller Island State Park, 3,406
115: Turkey Point Park, 1,327
107: Sue Creek Park, 834

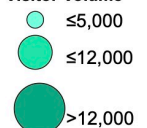


Chesapeake Bay Region

Chesapeake Bay Gateways
and Watertrails Network Sites
Visitor Volume



State and County Parks
and Other Public Lands
Visitor Volume

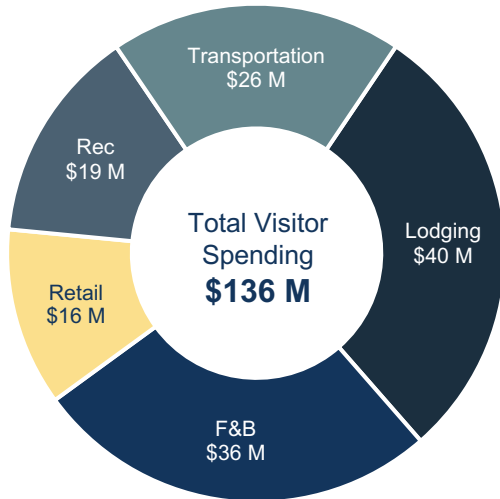


Chesapeake Bay Visitation by County:

Calvert

Calvert welcomed **446,000** CBR visitors in 2021

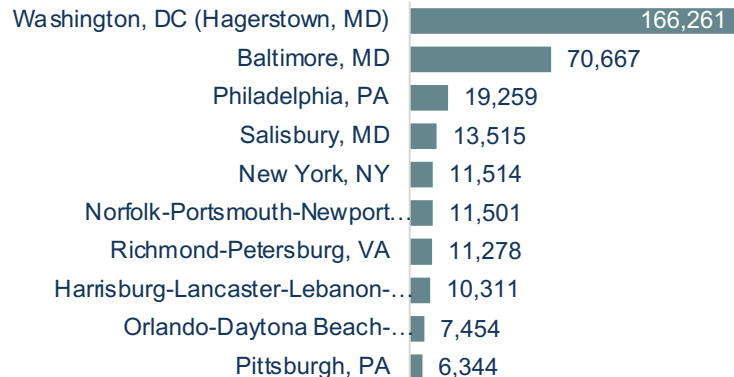
Calvert CBR Visitor Spending



Note: category spending may not sum to the total due to rounding

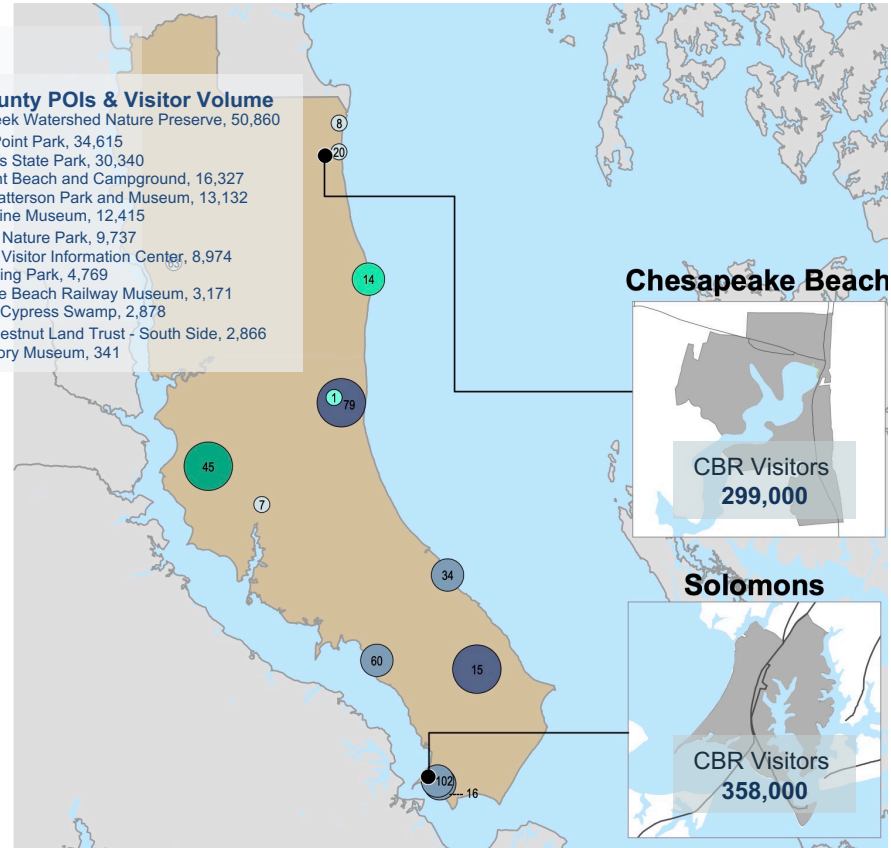
Average Length of Stay = 2.3 days

Calvert Top-10 Origin DMAs (Visitor Volume)

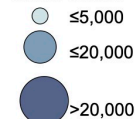


Calvert County POIs & Visitor Volume

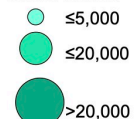
79: Parkers Creek Watershed Nature Preserve, 50,860
 45: Hallowing Point Park, 34,615
 15: Calvert Cliffs State Park, 30,340
 14: Breezy Point Beach and Campground, 16,327
 60: Jefferson Patterson Park and Museum, 13,132
 16: Calvert Marine Museum, 12,415
 34: Flag Ponds Nature Park, 9,737
 102: Solomons Visitor Information Center, 8,974
 63: King's Landing Park, 4,769
 20: Chesapeake Beach Railway Museum, 3,171
 7: Battle Creek Cypress Swamp, 2,878
 1: American Chestnut Land Trust - South Side, 2,866
 8: Bayside History Museum, 341



Chesapeake Bay Gateways and Watertrails Network Sites Visitor Volume



State and County Parks and Other Public Lands Visitor Volume

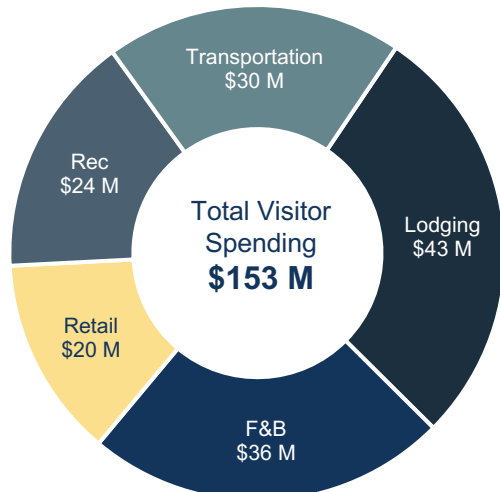


Chesapeake Bay Visitation by County:

Cecil

Cecil welcomed **592,000** CBR visitors in 2021

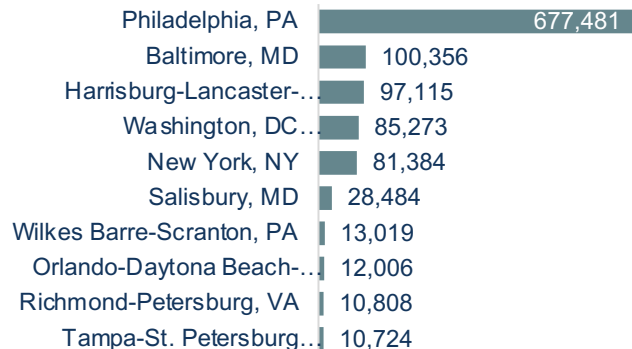
Cecil CBR Visitor Spending



Note: category spending may not sum to the total due to rounding

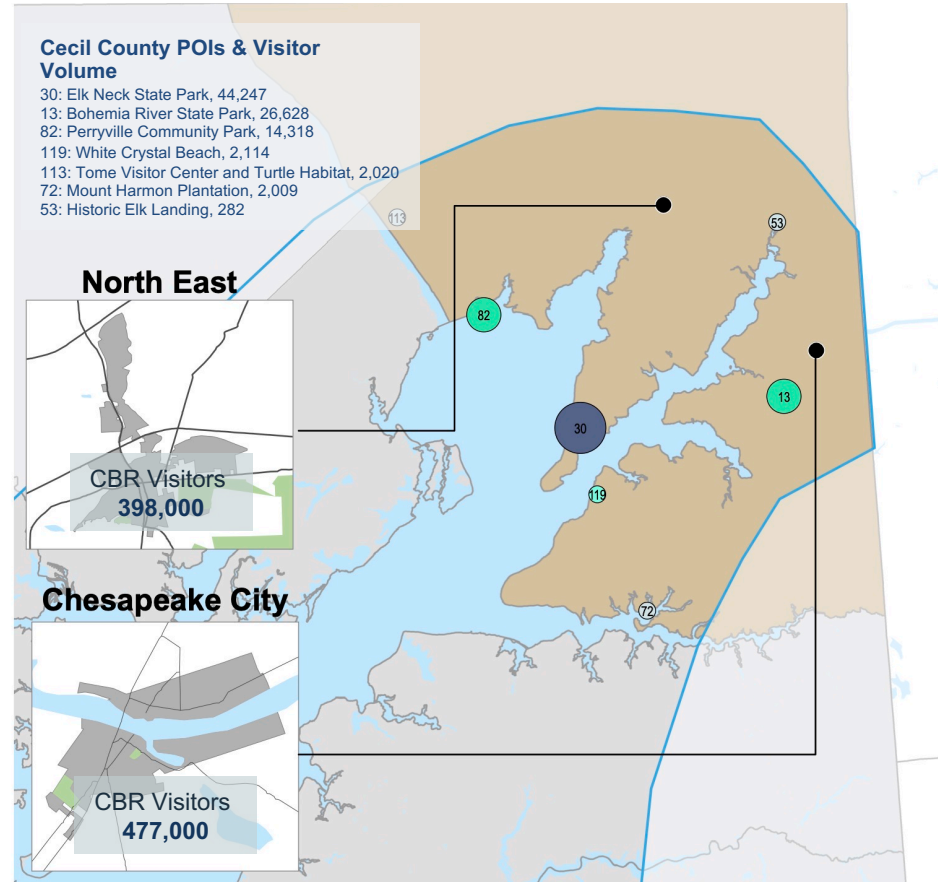
Average Length of Stay = 1.4 days

Cecil Top-10 Origin DMAs (Visitor Volume)



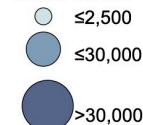
Cecil County POIs & Visitor Volume

30: Elk Neck State Park, 44,247
 13: Bohemia River State Park, 26,628
 82: Perryville Community Park, 14,318
 119: White Crystal Beach, 2,114
 113: Tome Visitor Center and Turtle Habitat, 2,020
 72: Mount Harmon Plantation, 2,009
 53: Historic Elk Landing, 282

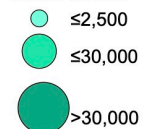


Chesapeake Bay Region

Chesapeake Bay Gateways and Watertrails Network Sites Visitor Volume



State and County Parks and Other Public Lands Visitor Volume

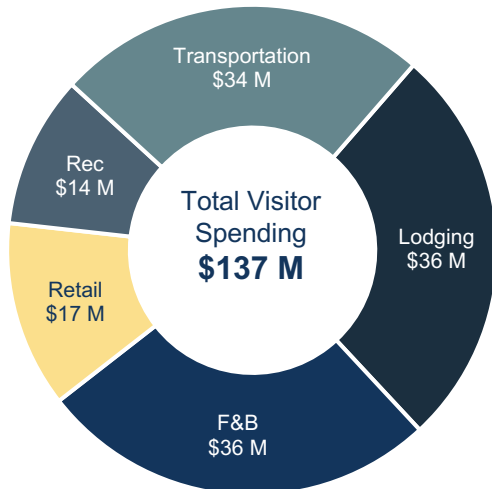


0 2.5 5 Miles
 Source: Rockport Analytics

Chesapeake Bay Visitation by County:

Dorchester

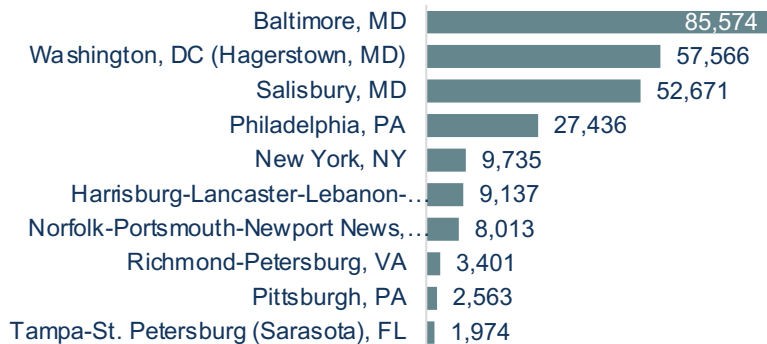
Dorchester CBR Visitor Spending



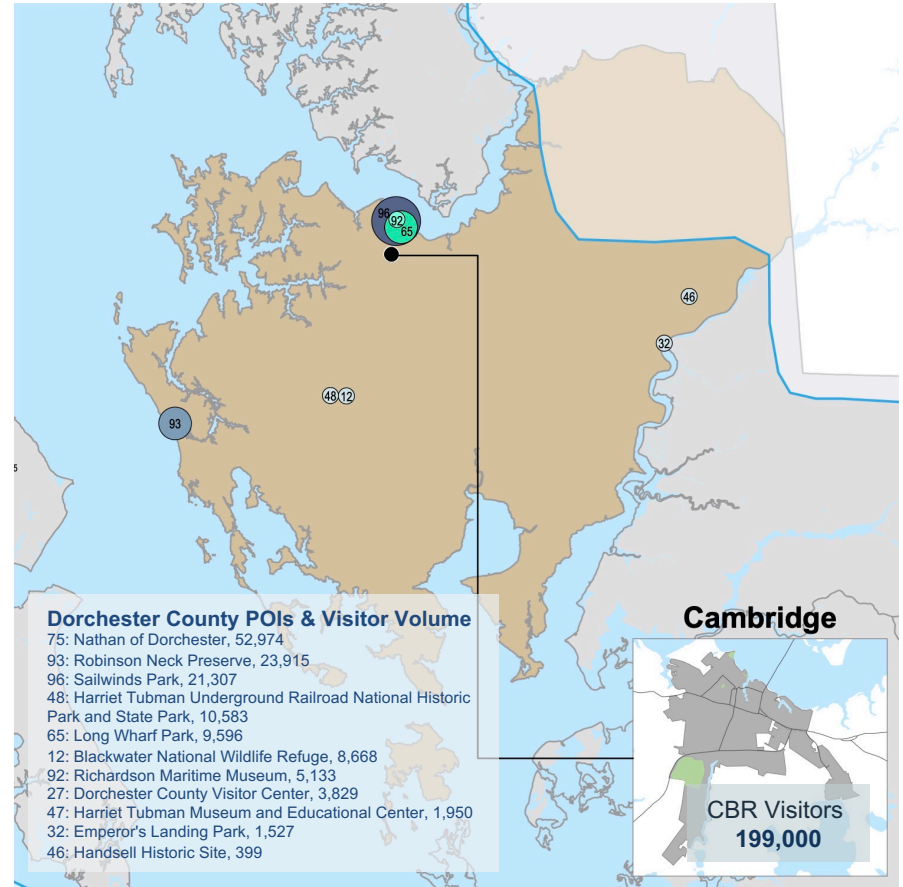
Note: category spending may not sum to the total due to rounding

Average Length of Stay = 1.6 days

Dorchester Top-10 Origin DMAs (Visitor Volume)



Dorchester welcomed **206,000** CBR visitors in 2021



Chesapeake Bay Region

Chesapeake Bay Gateways and Watertrails Network Sites Visitor Volume



State and County Parks and Other Public Lands Visitor Volume

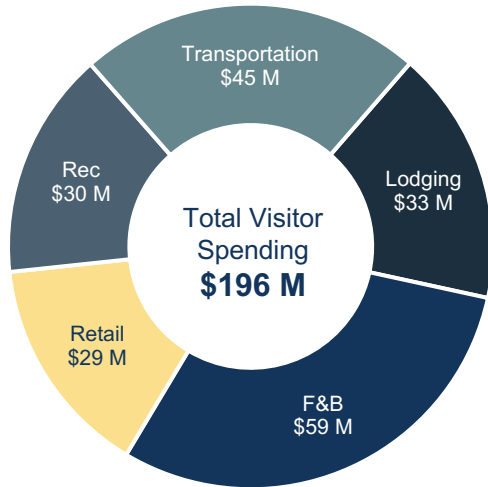


0 2.5 5 Miles
Source: Rockport Analytics

Chesapeake Bay Visitation by County:

Harford

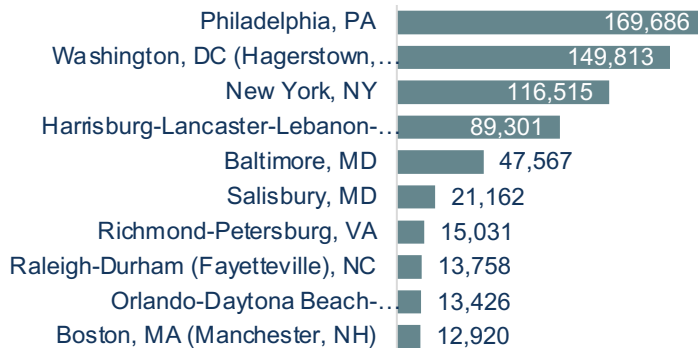
Harford CBR Visitor Spending



Note: category spending may not sum to the total due to rounding

Average Length of Stay = 1.8 days

Harford Top-10 Origin DMAs (Visitor Volume)

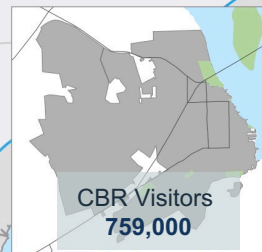


Harford welcomed **817,000** CBR visitors in 2021

Harford County POIs & Visitor Volume

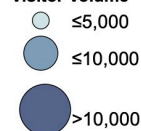
110: Susquehanna State Park, 38,984
 71: Millard Tydings Memorial Park, 21,589
 39: Frank J Hutchins Memorial Park, 9,596
 35: Flying Point Park, 6,519
 51: Havre de Grace Maritime Museum, 5,579
 2: Anita Leight Park and Estuary Center, 5,485
 98: Skipjack Martha Lewis, 4,557
 22: Concord Point Lighthouse, 3,348
 78: Otter Point Creek National Estuarine Research Reserve, 2,408
 50: Havre de Grace Decoy Museum, 2,185
 109: Susquehanna Museum of Havre de Grace, 1,503

Havre de Grace

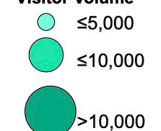


Chesapeake Bay Region

Chesapeake Bay Gateways and Watertrails Network Sites Visitor Volume



State and County Parks and Other Public Lands Visitor Volume

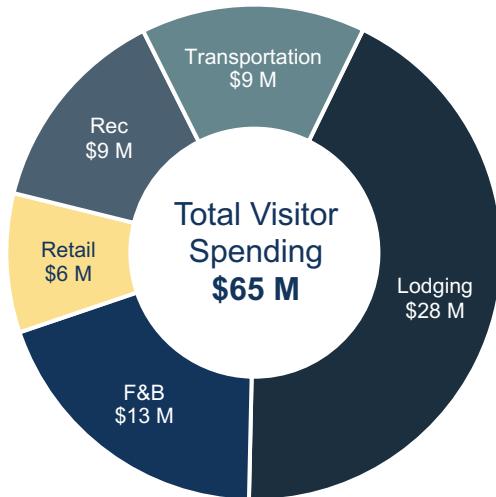


Chesapeake Bay Visitation by County:

Kent

Kent welcomed **197,000** CBR visitors in 2021

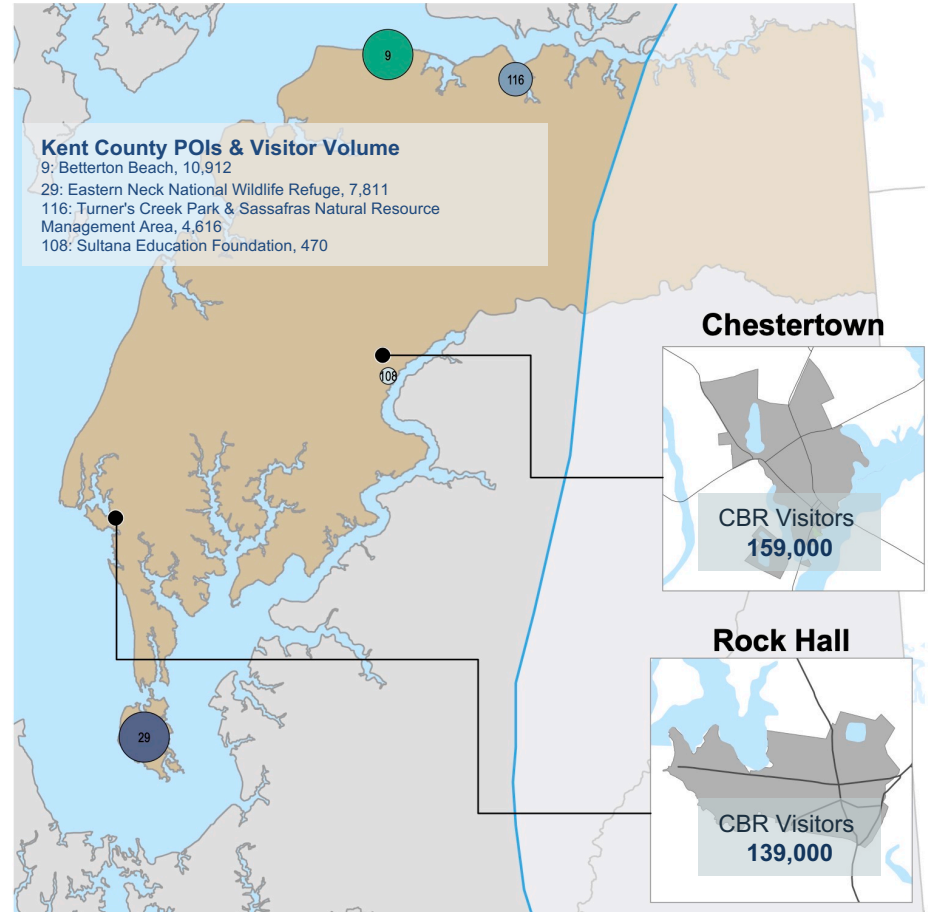
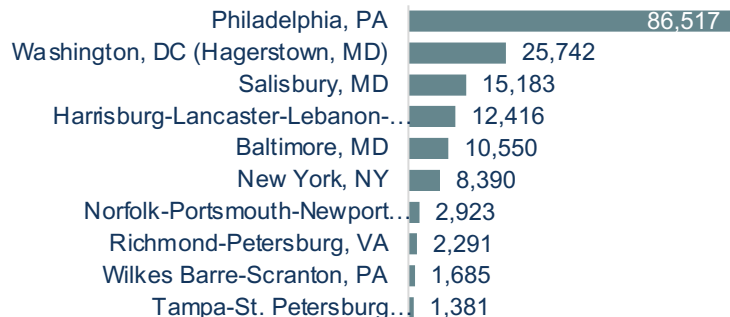
Kent CBR Visitor Spending



Note: category spending may not sum to the total due to rounding

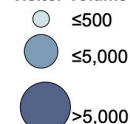
Average Length of Stay = 1.5 days

Kent Top-10 Origin DMAs (Visitor Volume)

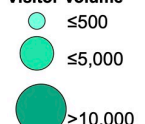


Chesapeake Bay Region

Chesapeake Bay Gateways and Watertrails Network Sites Visitor Volume



State and County Parks and Other Public Lands Visitor Volume

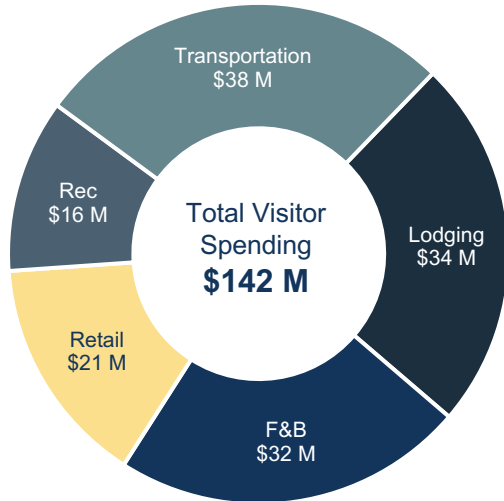


0 2.5 5 Miles
Source: Rockport Analytics

Chesapeake Bay Visitation by County:

Queen Anne's

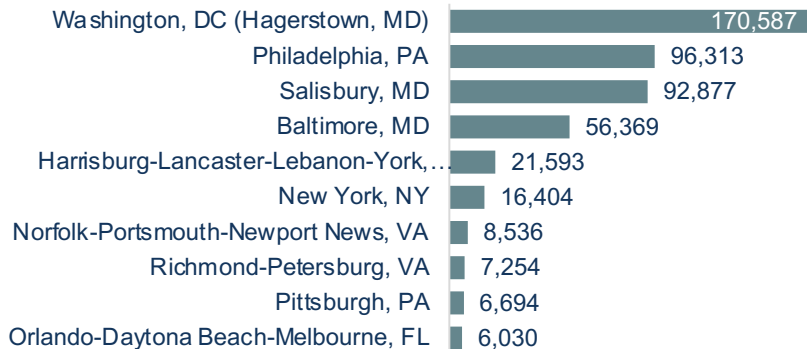
Queen Anne's CBR Visitor Spending



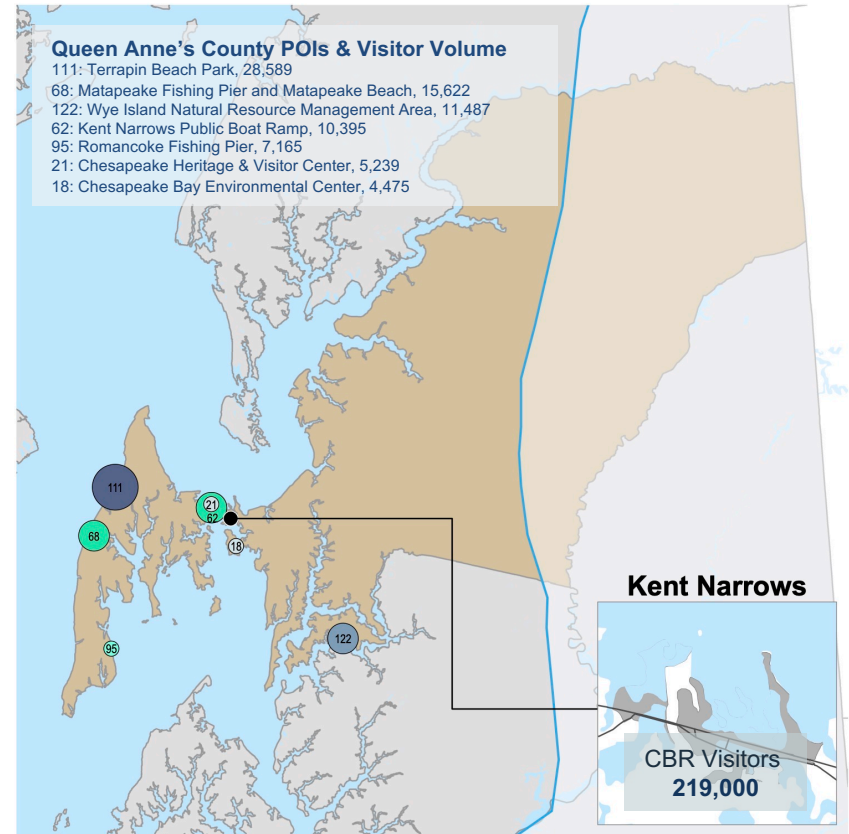
Note: category spending may not sum to the total due to rounding

Average Length of Stay = 1.3 days

Queen Anne's Top-10 Origin DMAs (Visitor Volume)

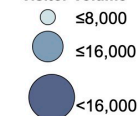


Queen Anne's welcomed **248,000** CBR visitors in 2021

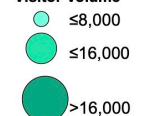


Chesapeake Bay Region

Chesapeake Bay Gateways and Watertrails Network Sites Visitor Volume

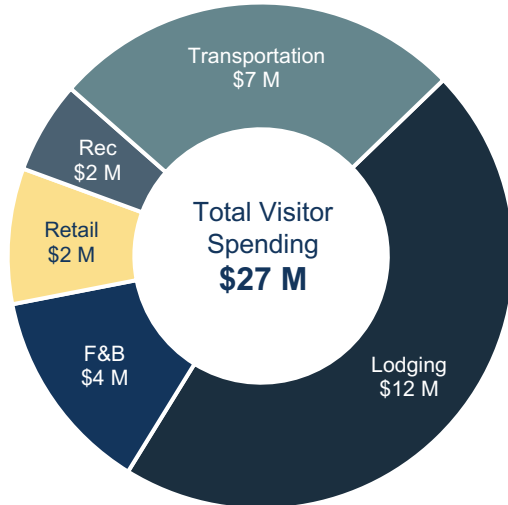


State and County Parks and Other Public Lands Visitor Volume



Chesapeake Bay Visitation by County: Somerset

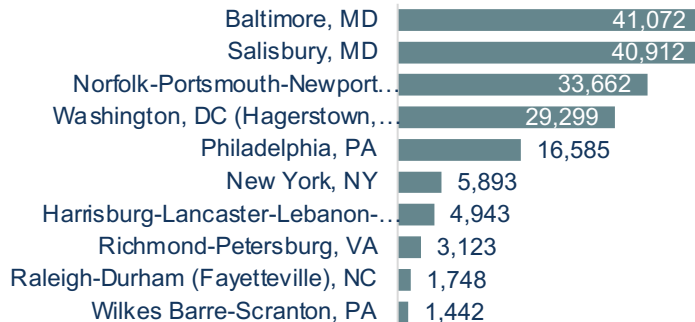
Somerset CBR Visitor Spending



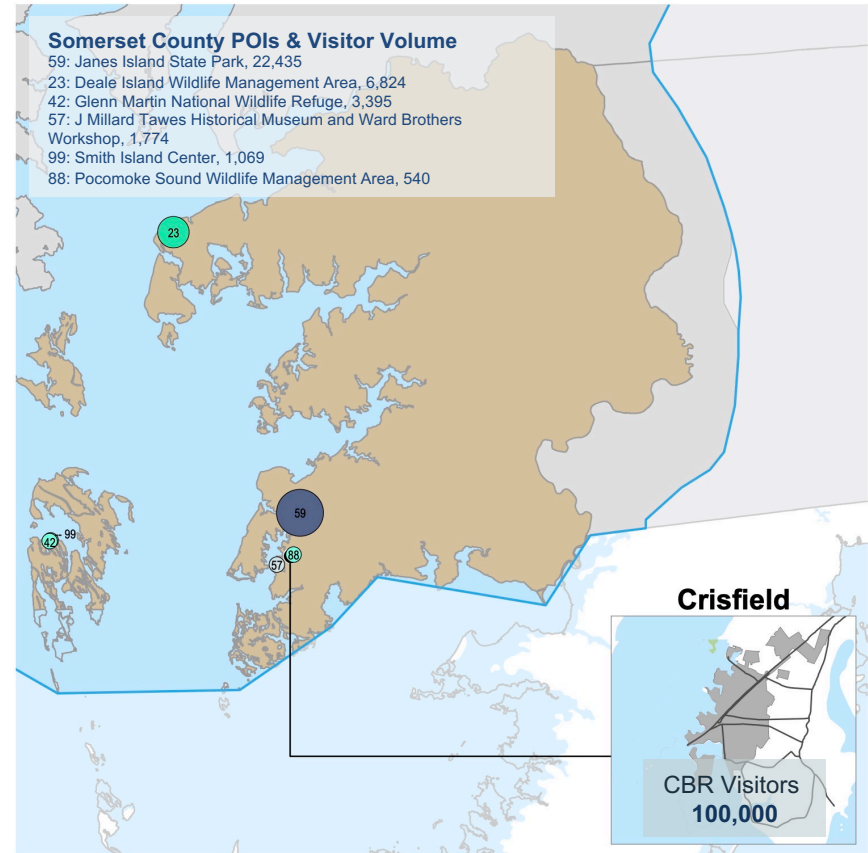
Note: category spending may not sum to the total due to rounding

Average Length of Stay = 1.7 days

Somerset Top-10 Origin DMAs
(Visitor Volume)

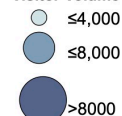


Somerset welcomed **118,000** CBR visitors in 2021

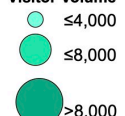


Chesapeake Bay Region

Chesapeake Bay Gateways
and Watertrails Network Sites
Visitor Volume



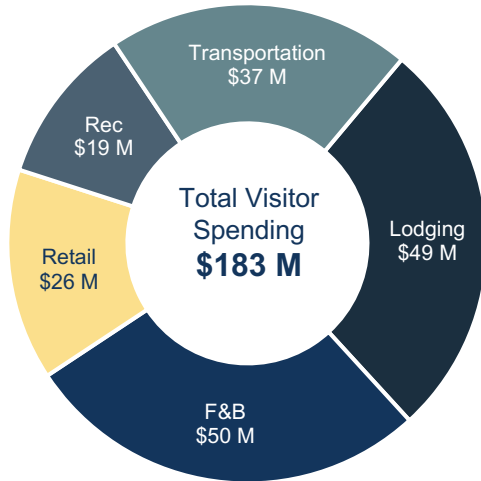
State and County Parks
and Other Public Lands
Visitor Volume



Chesapeake Bay Visitation by County:

St. Mary's

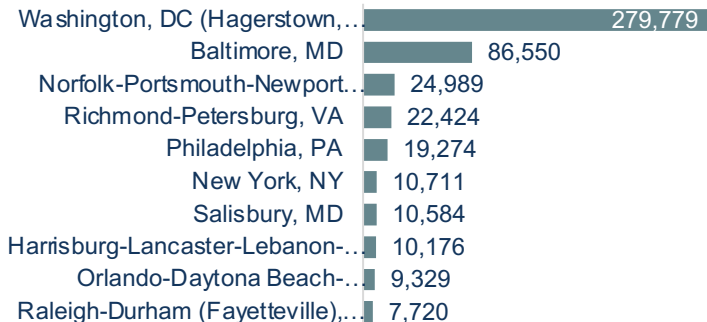
St. Mary's CBR Visitor Spending



Note: category spending may not sum to the total due to rounding

Average Length of Stay = 2.3 days

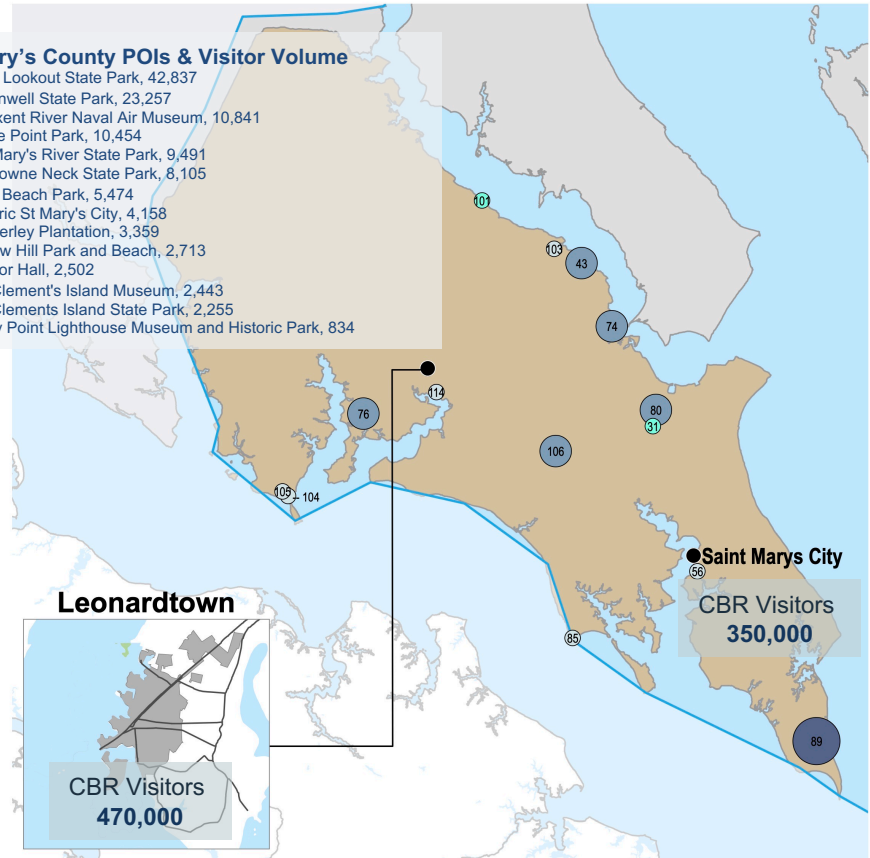
St. Mary's Top-10 Origin DMAs (Visitor Volume)



St. Mary's welcomed **594,000** CBR visitors in 2021

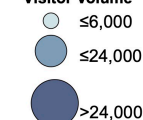
St. Mary's County POIs & Visitor Volume

89: Point Lookout State Park, 42,837
 43: Greenwell State Park, 23,257
 80: Patuxent River Naval Air Museum, 10,841
 74: Myrtle Point Park, 10,454
 106: St Mary's River State Park, 9,491
 76: Newtowne Neck State Park, 8,105
 31: Elms Beach Park, 5,474
 56: Historic St Mary's City, 4,158
 103: Sotterley Plantation, 3,359
 101: Snow Hill Park and Beach, 2,713
 114: Tudor Hall, 2,502
 104: St Clement's Island Museum, 2,443
 105: St Clements Island State Park, 2,255
 85: Piney Point Lighthouse Museum and Historic Park, 834

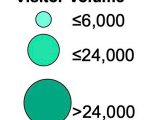


Chesapeake Bay Region

Chesapeake Bay Gateways and Watertrails Network Sites Visitor Volume



State and County Parks and Other Public Lands Visitor Volume

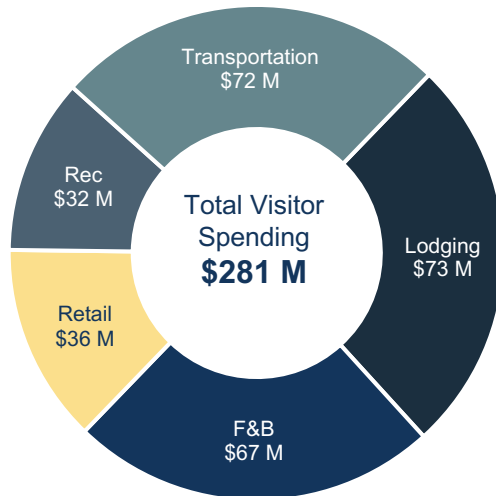


Chesapeake Bay Visitation by County:

Talbot

Talbot welcomed **516,000** CBR visitors in 2021

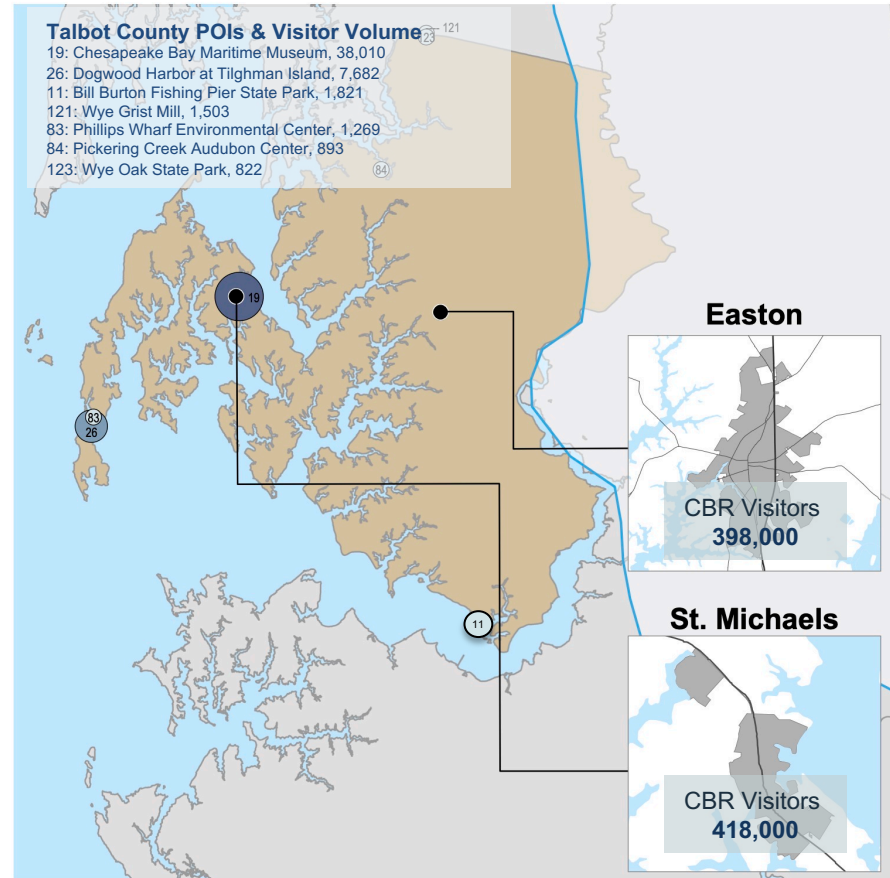
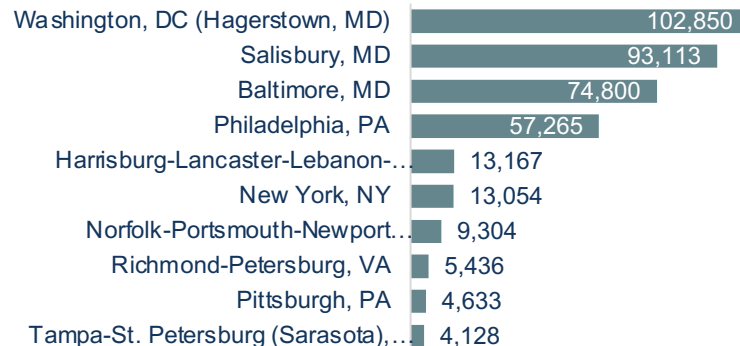
Talbot CBR Visitor Spending



Note: category spending may not sum to the total due to rounding

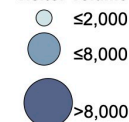
Average Length of Stay = 1.6 days

Talbot Top-10 Origin DMAs (Visitor Volume)

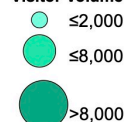


Chesapeake Bay Region

Chesapeake Bay Gateways and Watertrails Network Sites Visitor Volume



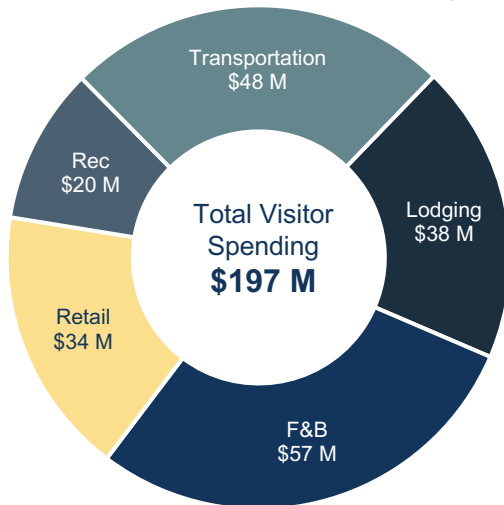
State and County Parks and Other Public Lands Visitor Volume



Chesapeake Bay Visitation by County:

Wicomico

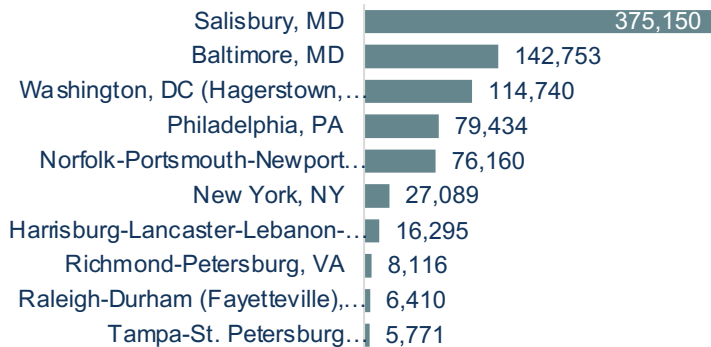
Wicomico CBR Visitor Spending



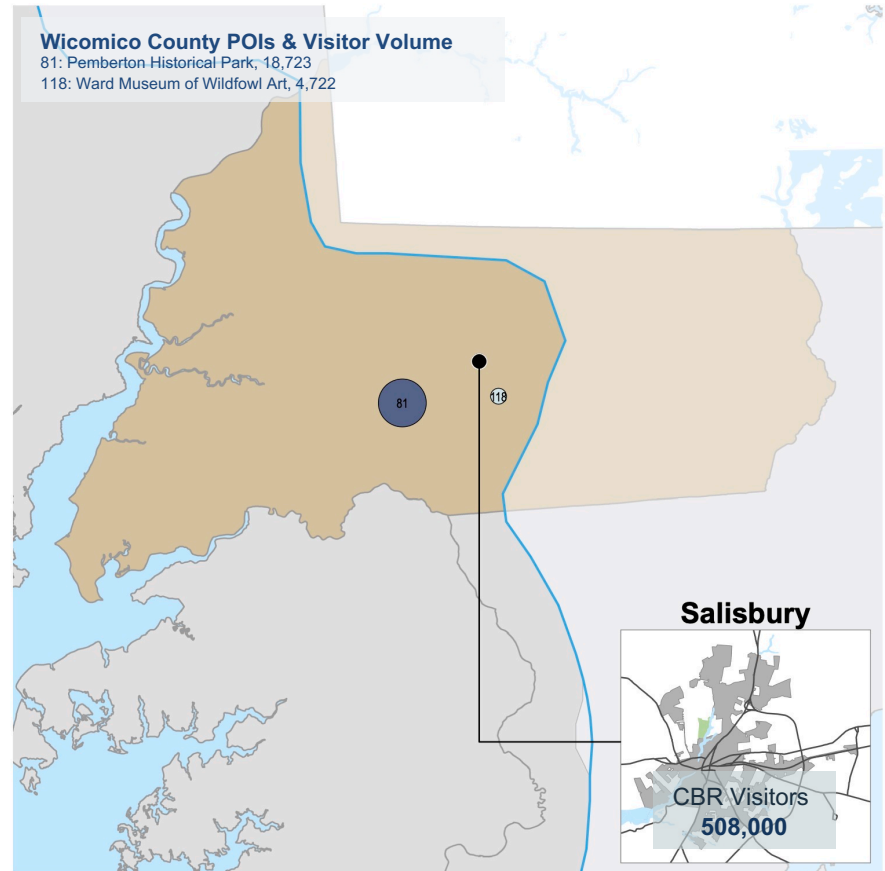
Note: category spending may not sum to the total due to rounding

Average Length of Stay = 1.7 days

Wicomico Top-10 Origin DMAs (Visitor Volume)



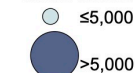
Wicomico welcomed **529,000** CBR visitors in 2021



Chesapeake Bay Region



Chesapeake Bay Gateways and Watertrails Network Sites Visitor Volume



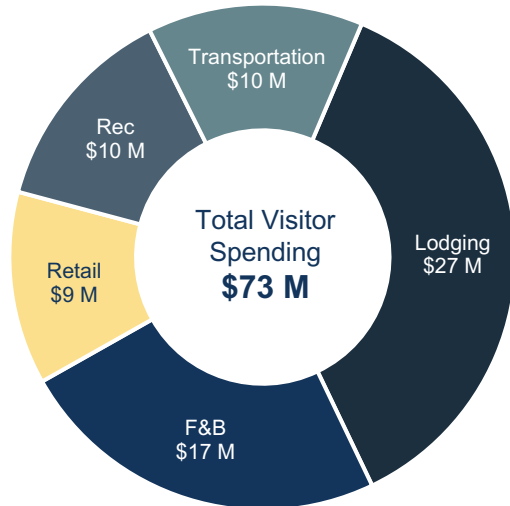
State and County Parks and Other Public Lands Visitor Volume



Chesapeake Bay Visitation by County:

Worcester

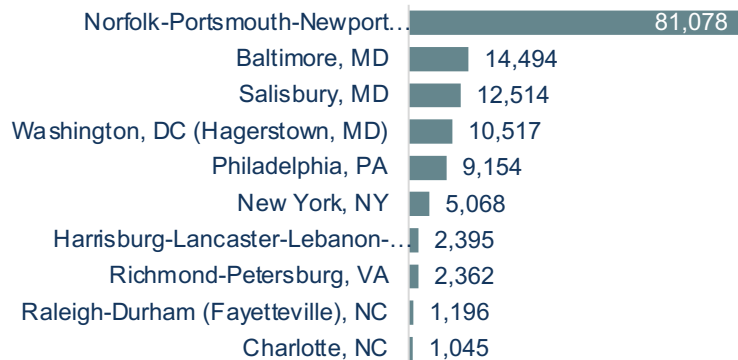
Worcester CBR Visitor Spending



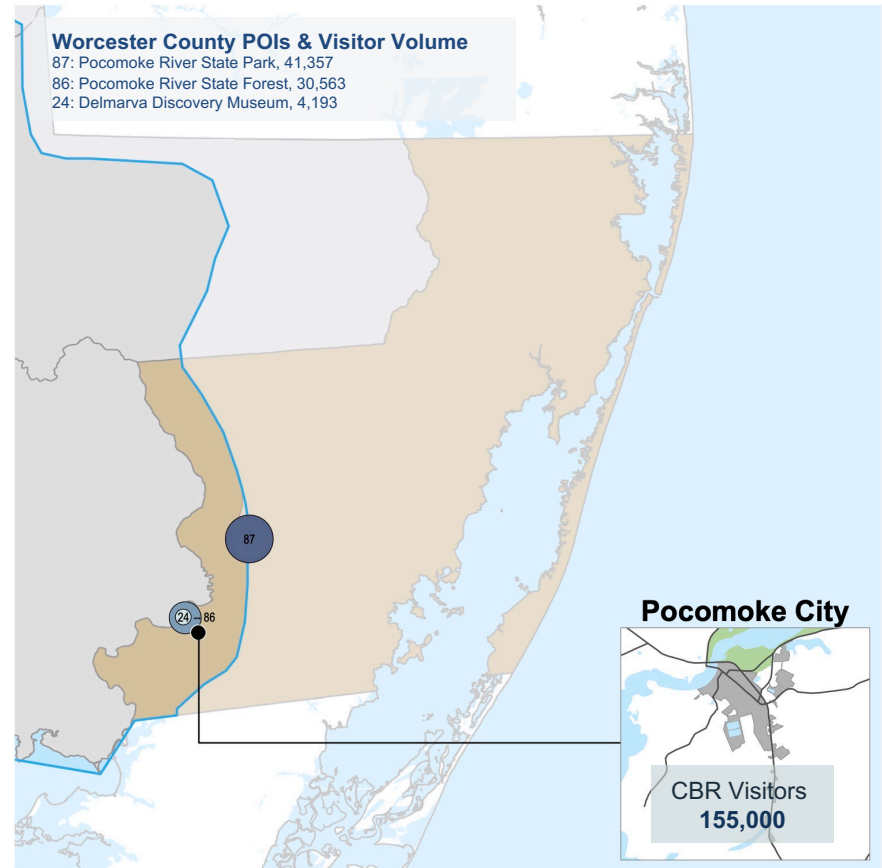
Note: category spending may not sum to the total due to rounding

Average Length of Stay = 2.0 days

Worcester Top-10 Origin DMAs (Visitor Volume)



Worcester welcomed **184,000** CBR visitors in 2021



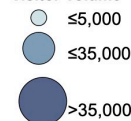
Chesapeake Bay Region



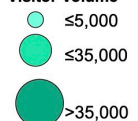
0 2.5 5 Miles

Source: Rockport Analytics

Chesapeake Bay Gateways and Watertrails Network Sites Visitor Volume



State and County Parks and Other Public Lands Visitor Volume



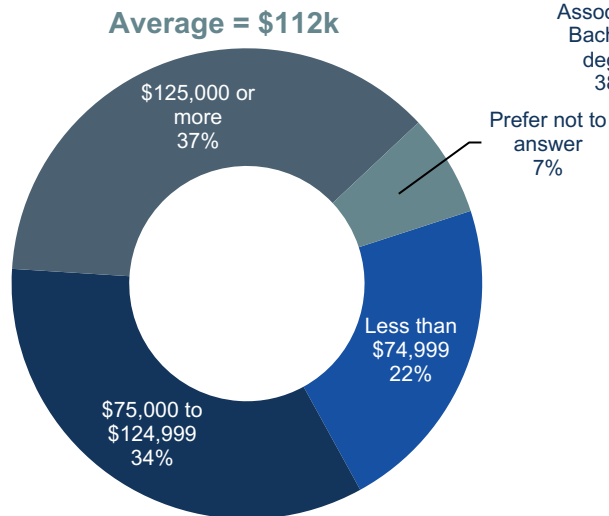


VISITATION TO MARYLAND'S CHESAPEAKE BAY REGION VISITOR PROFILE & ASSESSMENT

Chesapeake Bay Region Visitor Demographics

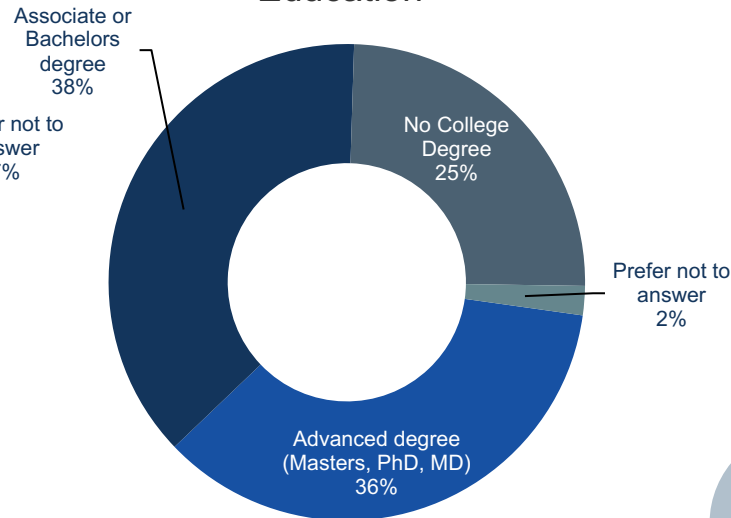
The household income of Chesapeake Bay visitors is well-distributed but skews well above the national average at \$112k. Travelers to the Chesapeake Bay Region are well educated with 38% having an associates or bachelors' degree and another 36% holding an advanced degree. Visitors to the region are more likely (59%) than the average US household (40%) to have children under the age of 18 at home. Two-thirds of visitors to the CBR are married, 13% are single and the remaining 20% are unmarried with partner, either cohabitating (7%), or living separately (4%), divorced (4%), widowed (2%), or preferred not to answer (1%). The age range of respondents was 18-72+¹, with an average age of 41.

Annual Household Income



Q: What is your household income? N=768

Education



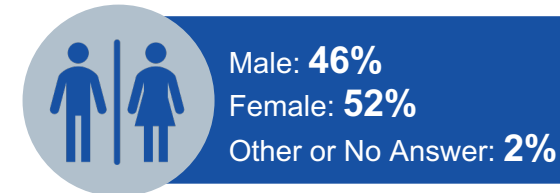
Q: What is your highest level of educational attainment? N=773



Q: Do you have children under the age of 18 at home? N=780



Q: What is your marital status? N=778

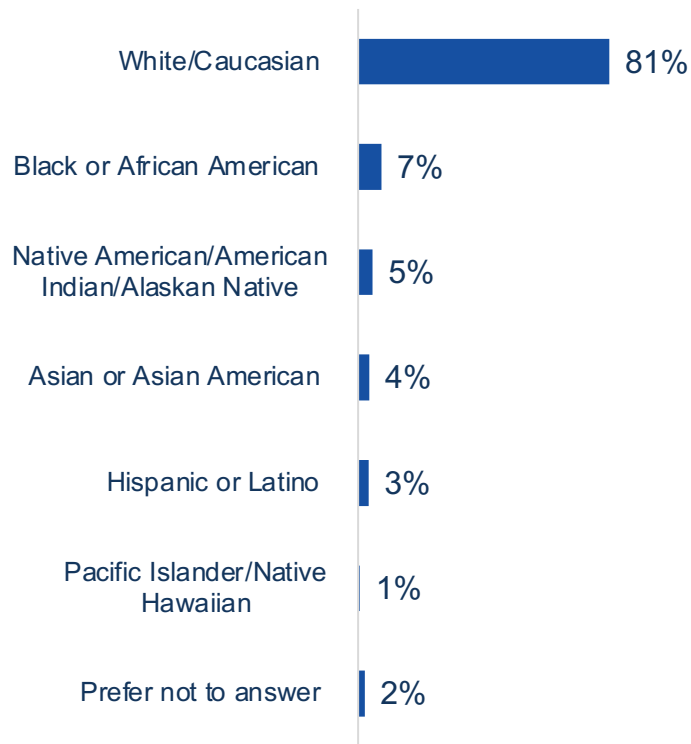


Q: Please indicate your gender. N=782

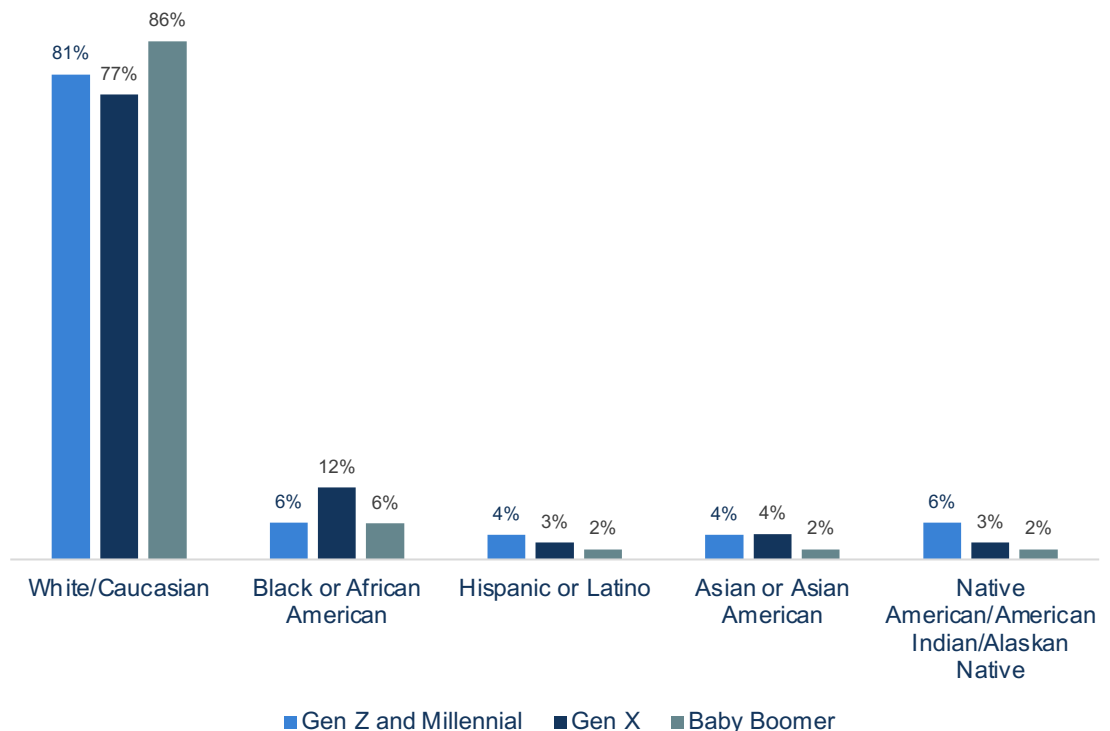
Chesapeake Bay Region Visitor Demographics

White/Caucasians comprised the majority (81%) of visitors to the Chesapeake Bay Region. Blacks represented 7% of visitors. Among those in Generation X (age 42-57), fewer were White (77%) and more were Black (12%) compared to both the Baby Boomer generation and Generation Z and Millennial generation.

Visitor Ethnicity



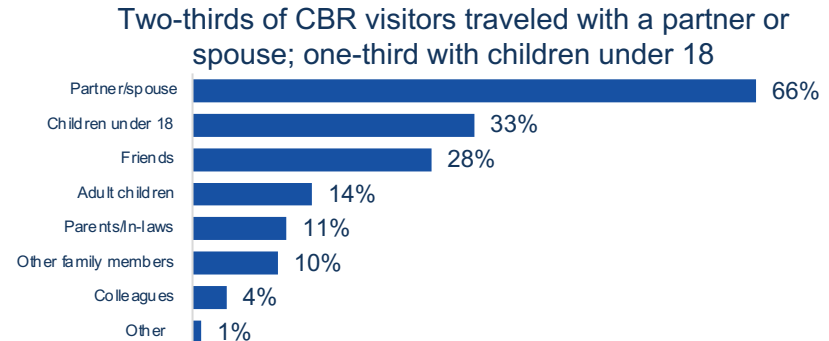
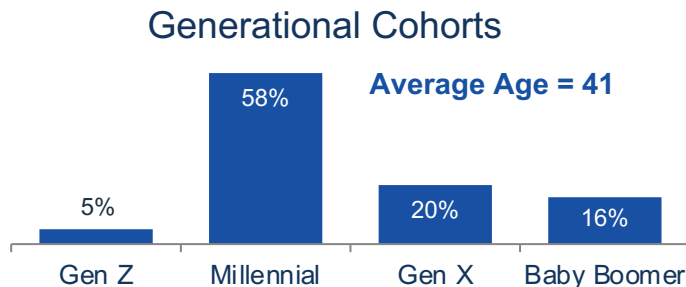
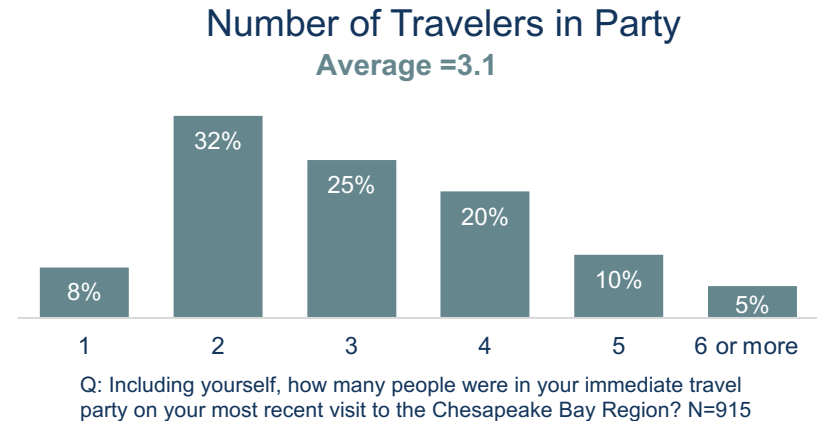
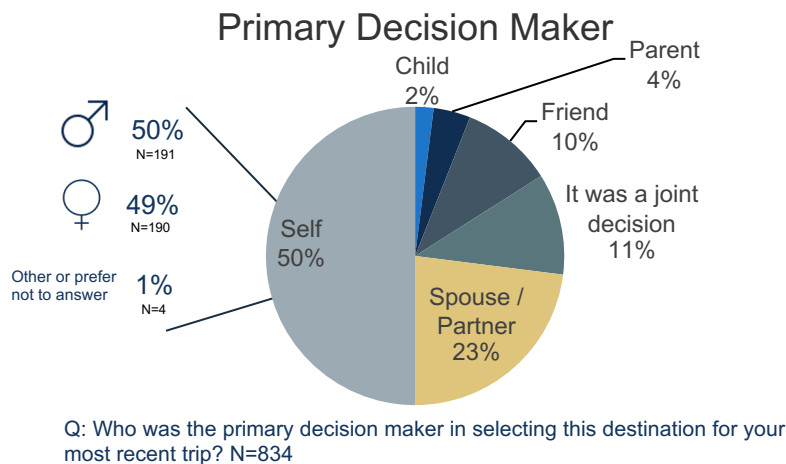
Visitor Ethnicity by Generation



Q: Which of the following best describes your ethnicity? (Select all that apply) N=796

Chesapeake Bay Region Visitor Demographics & Trip Characteristics

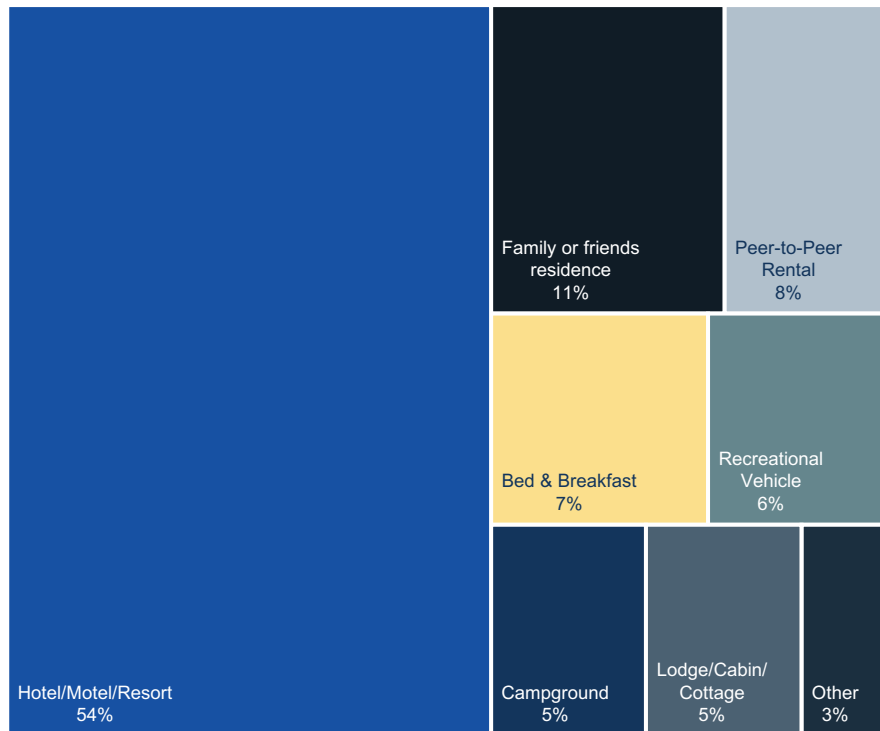
The average travel party size was 3.1 with nearly one-third (32%) traveling as a party of two and 15% traveling with parties of five or more. Half of all visitor responses came from primary decision-makers and 25% identified their spouse as the primary decision-maker when trip planning. Two-thirds of visitors to the CBR traveled with a partner or spouse and one-third traveled with children under 18. The majority of visitors to the region (58%) was comprised of millennials. The average age of all visitors was 41. Millennials (age 26-41) consisted of 58% of visitors. Generation Z (age 18-25), Generation X (age 42-57), and Baby Boomers (age 58+) comprised the remaining 41% of visitors.



Chesapeake Bay Region Visitor Trip Characteristics

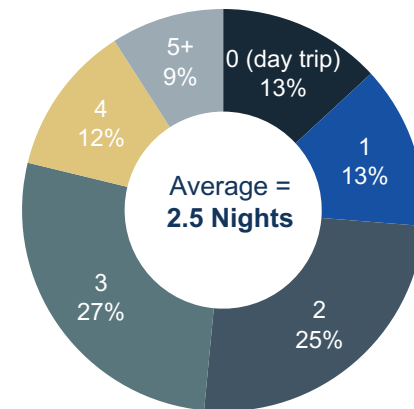
The average length of stay in the CBR was 2.5 days, with most visitors staying overnight (87%). More than half of overnight visitors **stayed in hotels, motels, or resorts** (54%), and 11% stayed with family or friends. **More than half used their personal automobile** as a mode of transportation (55%), and 18% rented a vehicle. Some of those were likely in conjunction with the 15% who traveled by air. Notably, 13% traveled by personal boat.

Primary Accommodations



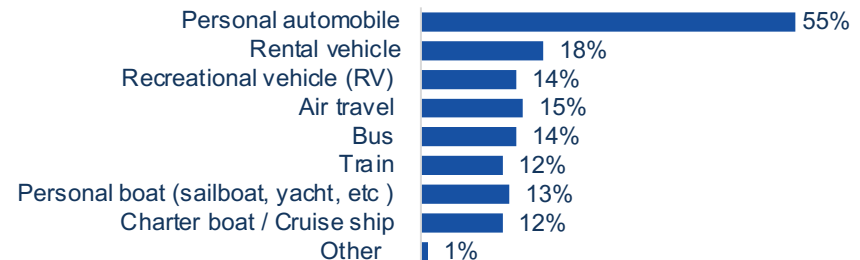
Q: Which of the following best describes your primary accommodations during your most recent overnight stay? N=734

Length of Stay: Nights in Region



Q: How many total nights did you stay in the Chesapeake Bay Region on your most recent visit? N=912

Modes of Transportation



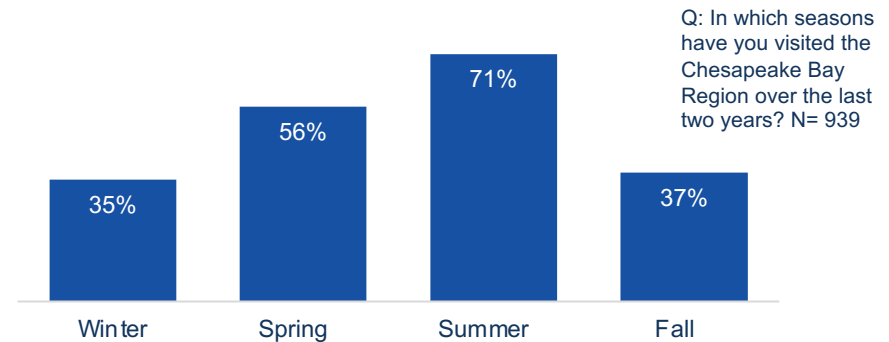
Q: Which modes of transportation did you use to get to the Chesapeake Bay Region on your most recent trip? N=871

Typical Visitation Patterns Among Chesapeake Bay Region Visitors

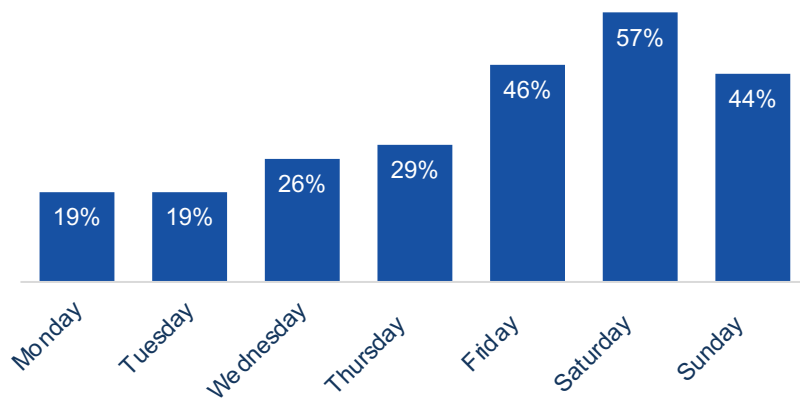
As would be expected, CBR **visitor volume increases on the weekends (Friday, Saturday, Sunday) and in the summer (71%)**. The spring shoulder season is also a popular time to visit with 56% of visitors coming to the CBR at least once in the spring over the last two years.

More than one-third of visitors (35%) have made 3-5 visits to the Chesapeake Bay Region in the past two years, and another one-third have made one to two trips in that time. **There were a significant number (11%) that have visited the Chesapeake Bay Region 10 or more times over the last two years.**

Percentage of Visits to the CBR By Season Over the Past Two Years

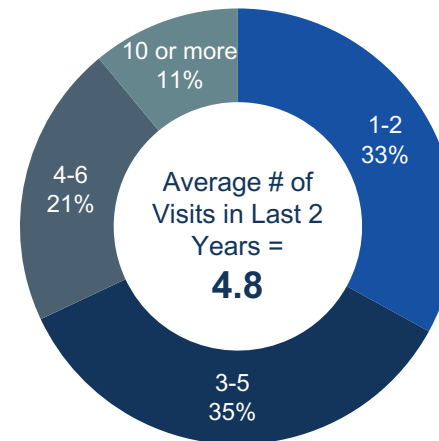


Weekend Visitation Drives Travel Volume to the CBR



Q: Which days of the week did you visit on your most recent visit? N= 920

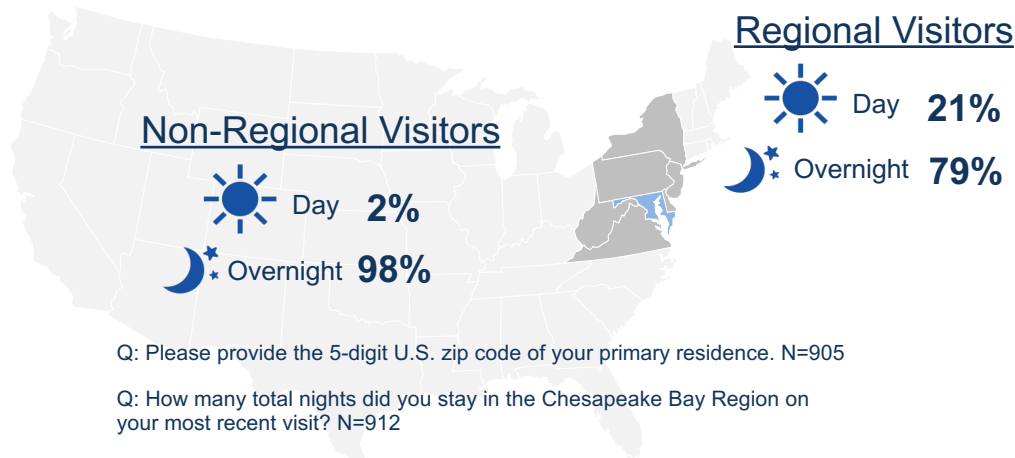
The CBR Draws a Large Proportion of Frequent Visitors



Q: How many times have you visited the Chesapeake Bay Region over the last 2 years? N=920

Regional Vs. Non-Regional Visitors

Regional origin markets make up a large share of the visitation to the Chesapeake Bay Region. These visitors are **more likely to be frequent visitors** (taken 3 or more trips to the region over the last two years) and are **more likely to visit the region on a day trip**. Regional visitors are also significantly **more likely than non-regional visitors to identify spending time with friends and family as the primary reason for their trip**.



	Regional Visitors	Non-Regional Visitors
Average length of stay (days)	3.3	4.2
Average spend per visitor	\$923	\$1,311
Average party size	3.1	3.2
% traveling with children	31%	36%
Average HH Income	\$111,000	\$115,000

Primary Trip Purpose (Number of Respondents)	All Visitors (N=786)	Regional Visitors (N=475)	Non-Regional Visitors (N=311)
To spend time with friends or family	25%	29%	19%
To escape from stress and the demands of daily life	13%	13%	13%
To experience the Chesapeake Bay's nature, ecology and/or wildlife	13%	13%	12%
To experience the Chesapeake Bay's food / culinary offerings	10%	10%	10%
To experience the Chesapeake Bays culture / history	9%	10%	8%
To participate in water-based activities	8%	7%	10%
To experience a part of the world I've never seen before	7%	6%	9%
For business travel	4%	4%	5%
To take an educational trip	3%	1%	6%
To fish or hunt on/near the Bay	3%	3%	4%
Other	1%	2%	1%

Regional visitors include those from MD, VA, DE, PA, NJ, NY, WV, DC

CBR Traveler Personas

In order to better understand key drivers of visitation to the Chesapeake Bay Region, Rockport developed traveler segments around key attitudes and traveler preferences. These segments were developed by conducting factor analysis on responses from both the in-market and out-of-market samples to better understand the underlying factors motivating travelers to visit the Chesapeake Bay Region. The factor analysis yielded seven distinct traveler segments. These segments have been profiled below and on the following page.

Experiencers

Experiencers made up 25% of travelers to the CBR in 2021, approximately 2.3 million visitors.

- Experiencers are most likely to choose a destination based on access to a large variety of activities from entertainment and nightlife to water-based outdoor activities.
- Experiencers are more likely to visit multiple different towns when visiting the Chesapeake Bay Region.
- Experiencers tend to travel more often and spend more per trip on average than any other persona group. They are more likely to choose luxury hotels.
- Experiencers more likely than most other travelers to take a storyteller tour.
- Experiencers are more likely to use multiple information sources when planning a trip including social media postings, trip review sites, travel guides/brochures.

Average Age: 36
Average HH Income: \$127,000
Children Under 18: 82%



Cultural Explorers

Cultural Explorers made up 17% of travelers to the CBR in 2021, approximately 1.5 million visitors.

- Cultural Explorers are most likely to choose a destination based on access to cultural activities, museums and heritage sites. They also seek out unique dining and culinary offerings and destinations off the beaten path. Cultural Explorers also travel to spend time with friends or family.
- Cultural Explorers are more likely to visit quintessential Chesapeake region towns such as Annapolis and St. Michaels. They have relatively high Net Promoter Scores and are interested in a large variety of Storyteller Tours, particularly those focused on the history of the CBR.
- Cultural Explorers are more likely than other visitors to use an internet search or knowledge from a prior visit when planning a trip.

Average Age: 45
Average HH Income: \$119,000
Children Under 18: 34%

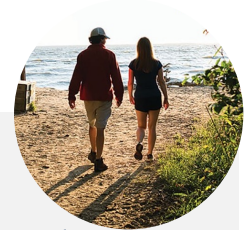


Outdoor Enthusiasts

Outdoor Enthusiasts made up 17% of travelers to the CBR in 2021, approximately 1.5 million visitors.

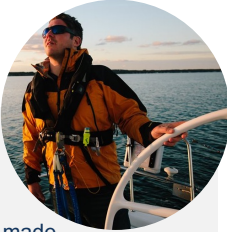
- Outdoor Enthusiasts are most likely to take a trip to 'get away from it all' or explore off the beaten track destinations. They are drawn to the Chesapeake Bay Region by walkable waterfront towns and a large variety of outdoor activities.
- Not surprisingly, these visitors are more likely than most visitors to participate in an outdoor activity or in watersports when visiting the CBR. They are also more likely to visit a town, take part in sightseeing or photography or visit and national, state or county park.
- Outdoor Enthusiasts are more likely than other visitors to visit towns like Rock Hall, Cambridge, Easton and Havre De Grace.

Average Age: 41
Average HH Income: \$114,000
Children Under 18: 43%



CBR Traveler Personas (Continued)

Footloose Escapists



Footloose Escapists made up 13% of travelers to the CBR in 2021, approximately 1.2 million visitors.

- Footloose Escapists are more likely than any other segment to travel independently and are looking to 'get away from it all'. The primary reason for their visit the Chesapeake Bay Region to escape the demands and stresses of daily life or to enjoy the Bay's nature, ecology, and wildlife.
- Footloose Escapists are more likely than other visitors to get information to plan their trip through newspaper/magazine ads, articles, stories or travel deal sites.
- In general, Footloose Escapists are less interested in taking part in commercial activities, but they are interested in Storyteller Tours that include Watermen's life tours, sailing tours and sightseeing cruises.

Average Age: 42

Average HH Income: \$117,000

Children Under 18: 61%

Family First



Family First travelers made up 11% of travelers to the CBR in 2021, approximately 945,000 visitors.

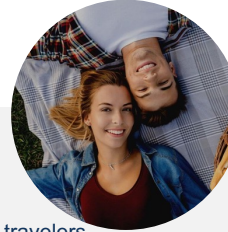
- Family First travelers primarily travel to the CBR to spend time with family. Travel allows them the opportunity to connect with family members and create new family traditions.
- Family First travelers are significantly more likely than most visitors to use recommendations from friends, family or colleagues when planning a trip to the CBR.
- Family First travelers spend less than average on a per-visitor basis, but higher than the average traveler on a per party basis.
- Family First travelers enjoying dining out, shopping and picnicking. Not surprisingly they are more likely to be in the region to visit friends and relatives (VFR).

Average Age: 42

Average HH Income: \$112,000

Children Under 18: 68%

Familiarity & Value



Familiarity & Value travelers made up 10% of travelers to the CBR in 2021, approximately 852,000 visitors.

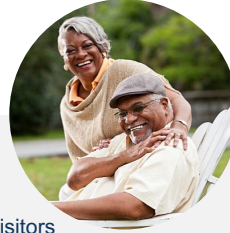
- Familiarity & Value travelers tend to look for deals when they travel. They prefer road trips and are more comfortable staying in budget hotels
- Familiarity & Value travelers are more likely to take part in activities like fishing, hunting and bird or wildlife viewing when visiting the CBR.
- Familiarity & Value travelers are more likely to use travel deal sites, travel guides and brochures, the Visit Maryland website or information from visitor centers when planning for their trip to the CBR.
- Familiarity & Value traveler are slightly more likely than other travelers to use more traditional channels like TV and radio ads when planning their trip to the CBR.

Average Age: 39

Average HH Income: \$110,000

Children Under 18: 69%

Rest & Relaxation



Rest & Relaxation visitors made up 7% of travelers to the CBR in 2021, approximately 666,000 visitors.

- Rest & Relaxation visitors are most likely to travel to relieve stress, escape everyday life, & spend time with family.
- Rest & Relaxation visitors are more likely than other visitors to dine out, shop, have a picnic, take part in sightseeing, photography or take a scenic drive.
- Rest & Relaxation visitors are typically looking for travel deals but tend to spend more than the average visitor based on longer average LOS.
- Rest & Relaxation visitors have the highest overall Net Promoter Scores (78) meaning they are more likely to recommend visitation to the CBR to friends and family, and their visit is most likely to generate future visits and economic impact.

Average Age: 49

Average HH Income: \$98,000

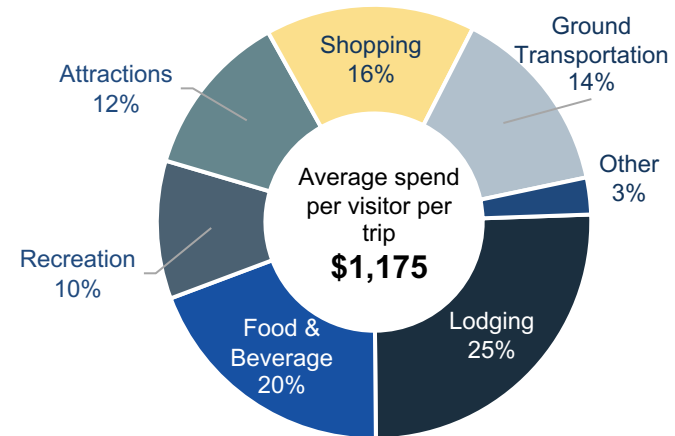
Children Under 18: 29%

Visitor Spending in the Chesapeake Bay Region

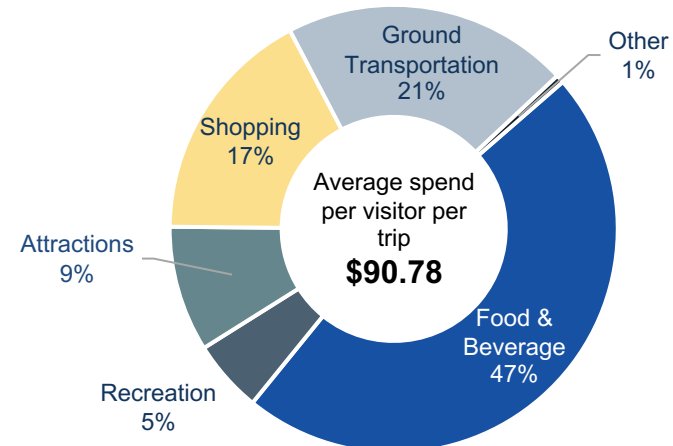
On average, visitors to the Chesapeake Bay Region over the last two years spent **\$1,056 per visitor per trip**. This includes \$285 per visitor spent on lodging, which makes up around a quarter of the average trip budget. Not surprisingly, day visitors spent significantly less per visitor (\$90.87) with nearly half of that budget spent on F&B.



Overnight Visitors



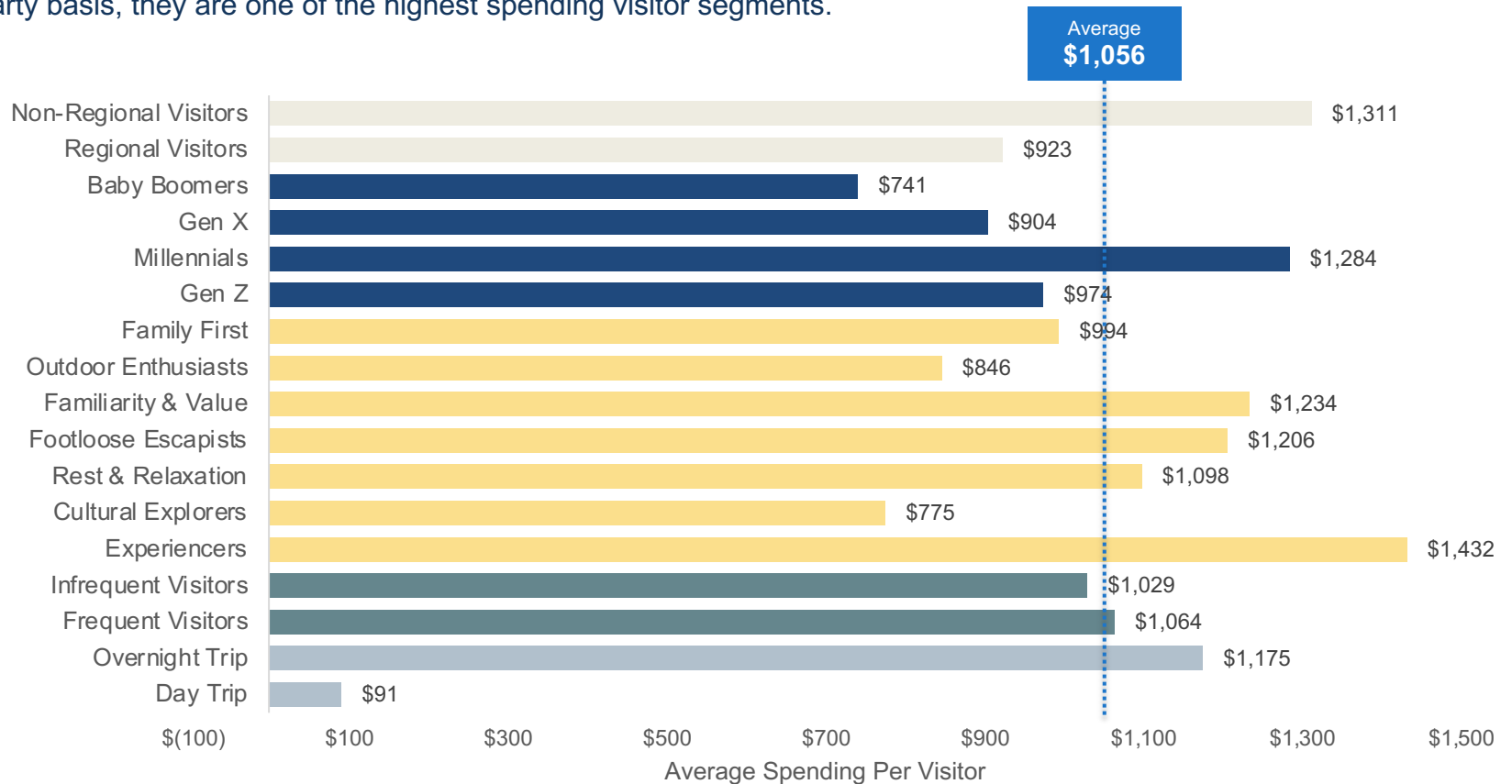
Day Visitors



Q: Thinking of your immediate travel party, please estimate how much your party spent per day in Maryland on the following items. (Round to the nearest dollar)
N=448 for lodging; N=617-660 for other spending categories

Average CBR Spending Per Visitor By Segment

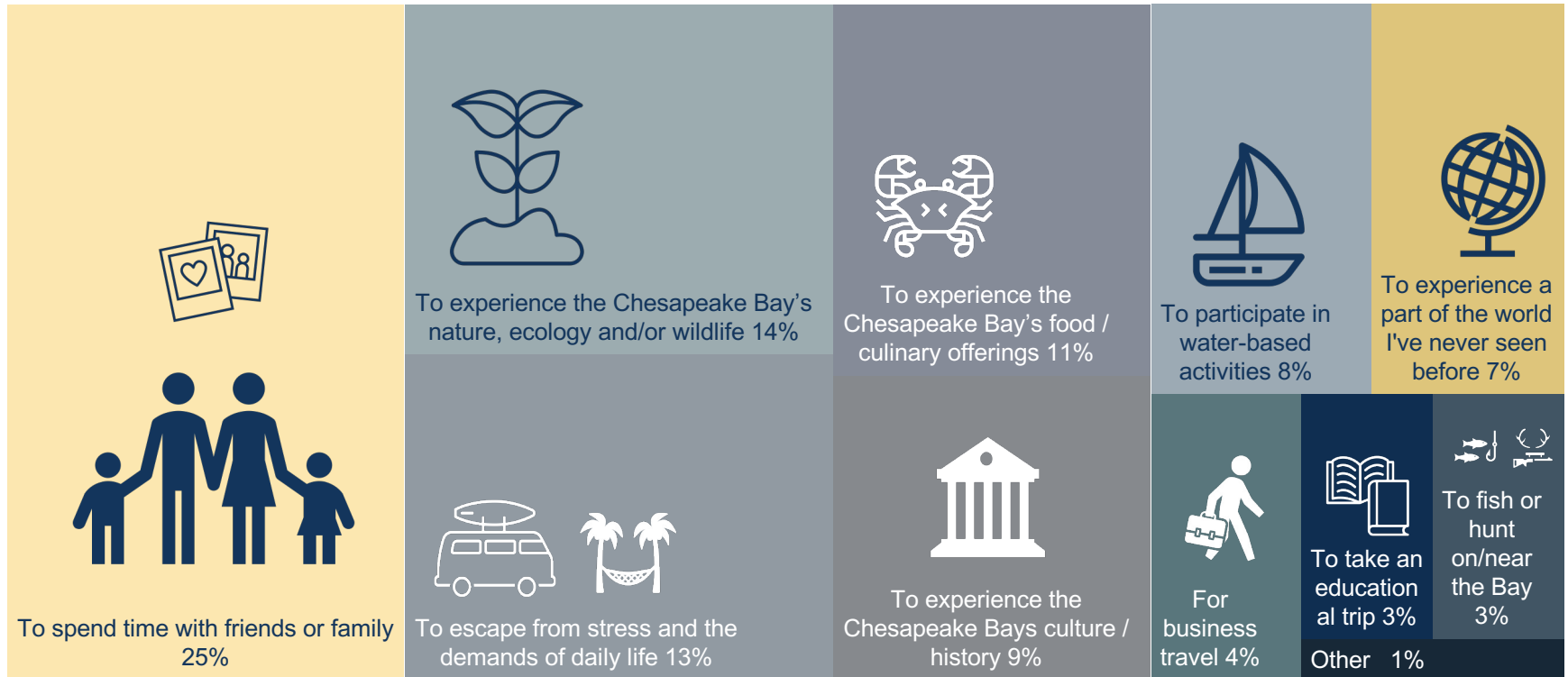
Not surprisingly, non-regional visitors spend more on average than regional visitors given their longer average length of stay (4.2 days vs 3.3 days). Millennials spent more than visitors in the other generational cohorts on average. Experiencers are the highest spending persona segment on average, followed by, surprisingly, those in the Familiarity and Value segment. Visitors from the Footloose Escapist and Rest & Relaxation segments also spent more than the average visitor. While those in Family First spent less per visitor, this spending is more likely to include that of children and on a per party basis, they are one of the highest spending visitor segments.



What Motivates Travelers to Visit the Chesapeake Bay Region?

One-quarter of respondents traveled to the Chesapeake Bay Region **to spend time with friends or family**. Other popular primary reasons for visiting the Chesapeake Bay Region include **experiencing the Bay's nature, ecology or wildlife (14%)**, **escaping the stress and demands of daily life (13%)**, and **experiencing the Bay's food/culinary offerings (11%)**.

Primary Reason for Visiting the Chesapeake Bay Region



Q: Which of these was your primary reason for visiting the Chesapeake Bay Region on your most recent visit? N=786

Primary Motivations For Travel to the CBR Differs Significantly By Persona Type

When analyzing the primary trip purpose through the lens of personas, it's clear that the Rest & Relaxation (43%) and Family First (46%) groups are significantly more likely than average (25%) to travel to the Chesapeake Bay Region to spend time with friends or family. Footloose Escapists are escaping stress and the demands of daily life while Experiencers appreciate the Bay's nature, ecology and/or wildlife. The Familiarity & Value group is almost three times more likely (11%) than average (4%) to be traveling to the region for business.

Primary Trip Purpose (Number of Respondents)	All Visitors (N=666)	Experiencers (N=168)	Cultural Explorers (N=116)	Rest & Relaxation (N=49)	Footloose Escapist (N=87)	Familiarity & Value (N=64)	Outdoor Enthusiasts (N=112)	Family First (N=70)
To spend time with friends or family ¹	25%	17%	30%	43%	16%	22%	18%	46%
To escape from stress and the demands of daily life	13%	12%	9%	14%	21%	9%	16%	11%
To experience the Chesapeake Bay's nature, ecology and/or wildlife	13%	17%	12%	6%	18%	9%	14%	4%
To experience the Chesapeake Bays culture / history	10%	10%	16%	12%	11%	9%	4%	4%
To experience the Chesapeake Bay's food / culinary offerings	10%	12%	9%	8%	6%	11%	11%	14%
To participate in water-based activities	8%	11%	6%	2%	3%	6%	12%	4%
To experience a part of the world I've never seen before	7%	9%	5%	10%	7%	8%	7%	3%
To take an educational trip	4%	5%	1%	0%	5%	9%	3%	4%
For business travel	4%	2%	3%	2%	7%	11%	4%	3%
To fish or hunt on/near the Bay	3%	4%	3%	2%	3%	2%	7%	0%
Other	1%	0%	4%	0%	0%	0%	0%	3%

Q: Which of these was your primary reason for visiting the Chesapeake Bay Region on your most recent visit? N=666

Regional Aspects Influencing the Most Recent Visit to the Chesapeake Bay Region

The beauty of the Chesapeake Bay and its tributaries drew 49% of visitors to the region; 48% were attracted by the opportunity to visit a waterfront Chesapeake Bay town. Other key drivers to the region include tasting and enjoying Chesapeake Bay culinary dishes (44%), participating in water and water-related activities (40%), and visiting Chesapeake Bay Gateways and Watertrails Network sites (40%).

Reasons for Current/Most-Recent Visit to Region



Q: Which of these were reasons for your most recent visit to the Chesapeake Bay Region? N=972

Chesapeake Bay Region Town & City Destinations of Interest

Which towns in the Chesapeake Bay Region are most appealing to travelers? It depends on who they are. **Many travelers (43%) include Annapolis** as a town they're interested in visiting in the future, **particularly the Rest & Relaxation** segment which has an index of 156 (100 is average). **Cultural Explorers index high for St. Michaels (187)** while the **Familiarity & Value group is more likely than any other segment to be interested in visiting Rock Hall (213).**

Towns of Future Interest (Indexed) (Number of Respondents)	All Visitors (N=670)	Experiencers (N=170)	Cultural Explorers (N=116)	Rest & Relaxation (N=50)	Footloose Escapist (N=87)	Familiarity & Value (N=64)	Outdoor Enthusiasts (N=112)	Family First (N=71)
Annapolis	43%	63	126	156	93	111	96	119
Baltimore	37%	107	97	110	100	107	69	110
Cambridge	30%	106	89	67	139	122	117	61
Chesapeake Beach	39%	163	53	100	97	122	56	84
Chesapeake City	31%	182	46	43	111	61	86	71
Chestertown	26%	133	53	67	120	153	93	53
Crisfield	17%	173	27	73	100	100	73	73
Easton	24%	92	75	117	133	75	117	58
Galesville	10%	189	22	22	89	178	78	44
Havre de Grace	19%	125	75	50	108	67	125	83
Kent Narrows	20%	117	100	83	67	117	100	92
Leonardtown	11%	129	114	0	100	200	57	14
North East	11%	157	57	29	100	86	129	43
Pocomoke City	14%	138	100	25	175	63	50	75
Rock Hall	15%	138	38	25	63	213	138	38
Salisbury	16%	78	89	133	100	133	122	89
Solomons Island	21%	89	56	67	122	156	100	111
St Mary's City	18%	144	89	44	89	89	67	78
St Michaels	28%	53	187	107	107	80	93	53

Q: Which of the following towns would you be interested in visiting on a trip to the Chesapeake Bay Region? N=863

Nearly Half the Visitors Enjoyed Local Seafood on Their Most Recent Trip

Participation in Activities on Current/Most Recent Trip to the Chesapeake Bay Region



Q: Please select the activities that members of your party participated in during your most recent visit to the Chesapeake Bay Region (Select all that apply); N=868

Activity Participation by Personas

Nearly three-quarters of the Rest & Relaxation segment enjoyed local seafood, and 56% in the segment visited a town on their most recent trip (highest proportion among all persona segments). Cultural Explorers, not surprisingly, were more likely to visit a historic site or take part in a cultural activity. Outdoor Enthusiasts were most likely to have participated in outdoor physical activities (49%) and watersports/water activities (43%). The Family First group was most likely to visit family and/or friends (35%). Footloose Escapists and Familiarity & Value visitors were less likely to participate in activities across the board when visiting the CBR.

Activities by Persona (Number of Respondents)	All Visitors (N=868)	Experiencers (N=170)	Cultural Explorers (N=116)	Rest & Relaxation (N=50)	Footloose Escapist (N=87)	Familiarity & Value (N=64)	Outdoor Enthusiasts (N=112)	Family First (N=71)
Dining, Shopping, and Experience								
Dined at a local establishment / Enjoyed local seafood	48%	36%	67%	74%	38%	28%	57%	61%
Shopping	38%	35%	47%	64%	39%	31%	38%	51%
Visited a local festival / Listened to live music	20%	33%	19%	16%	23%	14%	12%	18%
Picnic, cook-out	18%	22%	11%	28%	23%	17%	16%	28%
Visited a winery, brewery, distillery	17%	15%	22%	10%	17%	23%	17%	15%
Outdoor Active								
Outdoor physical activities	36%	39%	40%	40%	28%	17%	49%	32%
Watersports/water activities	32%	39%	22%	28%	22%	28%	43%	32%
Fishing / Hunting	15%	24%	9%	8%	16%	23%	11%	11%
History / Culture / Museum								
Historic site / Museum or attraction	30%	26%	53%	36%	21%	19%	30%	24%
Historic or cultural activity	23%	23%	38%	20%	18%	23%	21%	17%
Educational & Sightseeing								
Visited a town	37%	24%	53%	56%	40%	27%	42%	34%
Sightseeing / Photography	34%	29%	43%	46%	34%	22%	42%	38%
Pleasure driving	25%	24%	31%	44%	30%	17%	22%	35%
Visited a National, State, or County Park	25%	23%	34%	22%	23%	20%	37%	20%
Birding/wildlife viewing	19%	17%	25%	10%	14%	28%	29%	11%
Visited a National Wildlife Refuge	16%	17%	15%	6%	17%	20%	18%	11%
Took a guided tour	13%	20%	19%	2%	14%	11%	6%	11%
Interpretive programs/exhibits	12%	15%	21%	0%	10%	11%	12%	1%
VFR & Events								
Visited family and/or friends	23%	24%	16%	32%	23%	30%	23%	35%
Wedding / Reunion / Family event / Personal celebration	14%	19%	7%	12%	17%	27%	12%	11%

Q: Please select the activities that members of your party participated in during your most recent visit to the Chesapeake Bay Region (Select all that apply); N=868

Activities Participation by Generations

Top activities across all generational cohorts include dining, shopping and participating in outdoor activities. Baby Boomers and Gen Xers were more likely than their younger counterparts to visit towns, enjoy sightseeing or photography or take in historical or cultural activities. Gen Xers were more likely to visit a national, state, or county park than the other cohorts. Generation Z and Millennials were more likely to visit a local festival or participate in watersports/water activities.

Activities by Generation (Number of Respondents)	All Visitors (N=868)	Gen Z and Millennial (N=458)	Gen X (N=142)	Baby Boomer (N=117)
Dining, Shopping, and Experience				
Dined at a local establishment / Enjoyed local seafood	48%	41%	60%	66%
Shopping	38%	34%	49%	50%
Visited a local festival / Listened to live music	20%	25%	21%	12%
Picnic, cook-out	18%	20%	25%	10%
Visited a winery, brewery, distillery	17%	18%	20%	11%
Outdoor Active				
Outdoor physical activities	36%	33%	42%	42%
Watersports/water activities	32%	35%	27%	20%
Fishing / Hunting	15%	18%	17%	5%
History / Culture / Museum				
Historic site / Museum or attraction	30%	28%	39%	38%
Historic or cultural activity	23%	22%	33%	21%
Educational & Sightseeing				
Visited a town	37%	31%	48%	52%
Sightseeing / Photography	34%	27%	46%	44%
Visited a National, State, or County Park	25%	26%	34%	21%
Pleasure driving	25%	22%	32%	33%
Birding/wildlife viewing	19%	18%	21%	20%
Visited a National Wildlife Refuge	16%	17%	18%	11%
Took a guided tour	13%	15%	13%	7%
Interpretive programs/exhibits	12%	12%	13%	10%
VFR & Events				
Visited family and/or friends	23%	22%	27%	28%
Wedding / Reunion / Family event / Personal celebration	14%	14%	13%	10%

Q: Please select the activities that members of your party participated in during your most recent visit to the Chesapeake Bay Region (Select all that apply); N=868.
Gen Z had a small sample size (N=39) and was combined with Millennial.

Activity Participation Among Visitor Types

Day trip visitors were more likely than overnight visitors to visit a town and enjoy sightseeing or photography, but they were much less likely to go on a picnic, fish or hunt, take a guided tour, or attend a personal family event. Frequent visitors were more likely than infrequent visitors to participate in outdoor activities and watersports/water activities, while infrequent visitors were more likely to visit a historical site, museum or attraction.

Activities (Number of Respondents)	All Visitors (N=868)	Day Trip (N=117)	Overnight Trip (N=751)	Infrequent Visitor (1-2 Trips) (N=284)	Frequent Visitor (3 or more trips) (N=565)
Dining, Shopping, and Experience					
Dined at a local establishment / Enjoyed local seafood	48%	56%	46%	49%	48%
Shopping	38%	36%	39%	46%	35%
Visited a local festival / Listened to live music	20%	10%	22%	16%	23%
Picnic, cook-out	18%	6%	20%	19%	19%
Visited a winery, brewery, distillery	17%	12%	17%	17%	17%
Outdoor Active					
Outdoor physical activities	36%	38%	36%	32%	39%
Watersports/water activities	32%	15%	33%	23%	35%
Fishing / Hunting	15%	6%	16%	13%	16%
History / Culture / Museum					
Historic site / Museum or attraction	30%	36%	29%	36%	28%
Historic or cultural activity	23%	22%	23%	24%	24%
Educational & Sightseeing					
Visited a town	37%	46%	35%	43%	34%
Sightseeing / Photography	34%	44%	32%	40%	32%
Visited a National, State, or County Park	25%	22%	26%	24%	27%
Pleasure driving	25%	30%	24%	29%	24%
Birding/wildlife viewing	19%	20%	18%	13%	22%
Visited a National Wildlife Refuge	16%	12%	16%	12%	18%
Took a guided tour	13%	6%	14%	13%	13%
Interpretive programs/exhibits	12%	10%	12%	10%	13%
VFR & Events					
Visited family and/or friends	23%	15%	25%	24%	23%
Wedding / Reunion / Family event / Personal celebration	14%	4%	15%	10%	16%

Q: Please select the activities that members of your party participated in during your most recent visit to the Chesapeake Bay Region (Select all that apply) N=868

Sources of Information for Planning Trip to the Chesapeake Bay Region

Information Sources Used to Plan Trip to the Chesapeake Bay Region



Q: What information sources did you use to plan your visit to the Chesapeake Bay Region? N=867

Information Sources Used For CBR Trip Planning by Personas

Conducting an internet search is the number one trip planning resource among visitors. This is particularly true for Cultural Explorers and those in the Rest & Relaxation segment. Footloose Escapists are the least likely to utilize an Internet search and rely on recommendations from family, friends, or colleagues. Recommendations are also an important planning tool for Rest & Relaxation, Family First and Outdoor Enthusiast visitors. Familiarity & Value visitors are more likely than the average visitors to utilize travel guides, MOTD's website, welcome center recommendations, and travel deal sites. Experiencers are more likely than the average visitor to tap into a variety of planning tools/sources.

Information Sources by Persona (Number of Respondents)	All Visitors (N=867)	Experiencers (N=170)	Cultural Explorers (N=116)	Rest & Relaxation (N=50)	Footloose Escapist (N=87)	Familiarity & Value (N=64)	Outdoor Enthusiasts (N=112)	Family First (N=71)
Internet search	37%	36%	51%	52%	26%	30%	40%	38%
Recommendations from family, friends, colleagues	33%	36%	27%	42%	36%	30%	37%	42%
Previous visit / Prior knowledge	28%	15%	45%	54%	24%	14%	38%	30%
Travel guides/brochures	24%	36%	15%	10%	20%	31%	16%	30%
Social media posting, ads, articles	23%	36%	20%	22%	22%	27%	17%	24%
Trip review sites	23%	29%	27%	22%	21%	23%	20%	24%
Official Tourism Office Website for the State of Maryland	22%	37%	19%	16%	21%	27%	21%	15%
Travel deal sites	19%	32%	12%	12%	25%	27%	13%	11%
Recommendation from staff at a Welcome Center Staff	17%	34%	6%	2%	17%	23%	15%	7%
Website of the National Park Service	15%	21%	12%	8%	15%	20%	21%	10%
Television ads, show	12%	22%	4%	4%	17%	16%	5%	6%
Newspaper/Magazine ads, articles, stories	11%	19%	8%	4%	17%	9%	9%	10%
Travel agency	10%	23%	7%	2%	8%	14%	5%	4%
Conference/Meeting/Office/Event provided	9%	13%	4%	0%	8%	17%	9%	3%
Radio ads, articles	8%	15%	1%	6%	10%	14%	4%	3%
None of these	2%	1%	3%	4%	3%	3%	1%	7%
Other	2%	0%	2%	6%	2%	3%	2%	3%

Q: What information sources did you use to plan your visit to the Chesapeake Bay Region? N=867

Information Sources by Generations

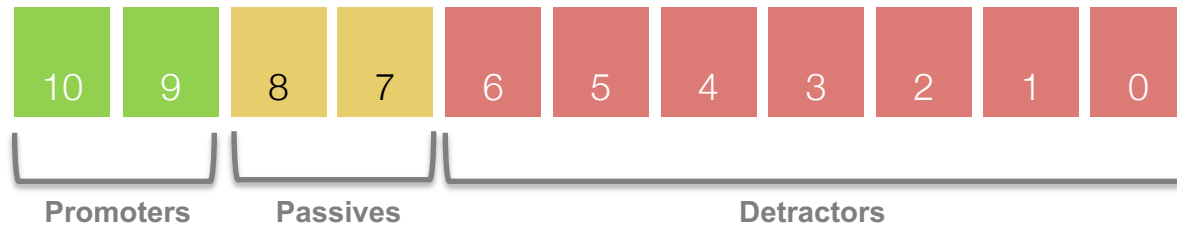
There are significant differences in trip planning resources used across generational cohorts. Baby Boomers were significantly more likely to rely on a previous visit or prior knowledge when planning a trip. Gen Z and Millennials were more likely than other cohorts to use sources like trip review sites, social media, travel guides, MOTD's website and Gen X was more likely than other cohorts to rely on internet searches and the National Park Service's website.

Information Sources by Generation (Number of Respondents)	All Visitors (N=867)	Gen Z and Millennial (N=458)	Gen X (N=142)	Baby Boomer (N=117)
Internet search	37%	34%	45%	42%
Recommendations from family, friends, colleagues	35%	37%	33%	31%
Previous visit / Prior knowledge	28%	19%	35%	53%
Travel guides/brochures	24%	29%	15%	13%
Trip review sites	23%	26%	24%	20%
Social media posting, ads, articles	23%	28%	23%	8%
Official Tourism Office Website for the State of Maryland	22%	28%	19%	10%
Travel deal sites	19%	26%	12%	10%
Recommendation from Welcome Center/Visitor Center in Maryland	17%	23%	12%	6%
Website of the National Park Service	15%	16%	20%	7%
Television ads, show	12%	15%	8%	2%
Newspaper/Magazine ads, articles, stories	11%	14%	9%	2%
Travel agency	10%	13%	8%	0%
Conference/Meeting/Office/Event provided	9%	12%	6%	1%
Radio ads, articles	8%	11%	6%	0%

Q: What information sources did you use to plan your visit to the Chesapeake Bay Region? N=867

Net Promoter Score : A Key Metric in Driving Visitation

Net Promoter Score is frequently used as a headline measure of customer loyalty. **Years of research have pointed to net promoter scores as being the single-most correlated satisfaction metric with profitability¹.** The Net Promoter system divides respondents into three categories: Promoters, Passives or Detractors.



The percentage of Detractors is subtracted from the percentage of Promoters to obtain the score, and higher scores are better than lower scores.

$$\begin{array}{ccccccc} \text{Promoters} & & \text{Detractors} & & & & \text{Net Promoter Score} \\ 64\% & - & 7\% & = & 57\% & \rightarrow & 57 \end{array}$$

As it applies to travel destinations, net promoter score is very important in determining who is likely to visit again, who is likely to promote your destination to others. While it is certainly not the only visitor loyalty or satisfaction measure for a destination to consider, it is an important measure to track and to work on improving over time if a destination is looking to improve offerings to visitors, increase visitor activity and economic impact.

¹Fred Reichheld, The Ultimate Question: Driving Good Profits and True Growth (Harvard Business Press, 2006)

Net Promoter Scores and Benchmarks

For our study we measured Net Promoter Scores for the Chesapeake Bay Region (CBR) as a whole, the Chesapeake Bay Storyteller Tours and the Chesapeake Bay Gateway Watertrails Network sites. The CBR, overall, scored significantly higher than either the Storyteller Tours or the CBGWNS. **The CBR's score of 57, ranks above the Travel & Tourism's industry average of 51.** As highlighted in the table below, there were more 'passives' when considering those likely to recommend CB Storyteller Tours or the CBGWNS than there were for the Chesapeake Region as a whole.

	Chesapeake Bay Region	CB Storytellers Tours	CB Gateways Watertrails & Network Sites
Promoters	64	47	49
Passives	30	41	40
Detractors	7	13	10
Net Promoter Score	57	34	39

CBR (57) →

CB Gateways (39) →

ST Tours (34) →

2022 Industry Benchmarks	Net Promoter Score
Department and Specialty Stores	62
Travel & Tourism	51
Smartphones	49
Brokerage/Investments	45
Computer and Tablets	42
Credit Cards	42
Online Shopping	41
Grocery/Supermarkets	40
Online Entertainment	39
Auto Insurance	37
Cell Phone Service	35
Drug Stores/Pharmacies	32
Banking	31
Home/Contents Insurance	31
Life Insurance	28
Shipping Services	27
Health Insurance	26
Hotels	26
Airlines	22
Rideshare & Food Delivery	22
Travel Websites	22
Software & Apps	18
Internet Service	6
Cable & Satellite TV Service	5

Based on your most recent visit, how likely is it that you would recommend a trip to the Chesapeake Bay Region to a friend, family member or colleague?
[0=Extremely unlikely, 10 =Extremely likely]; N=667

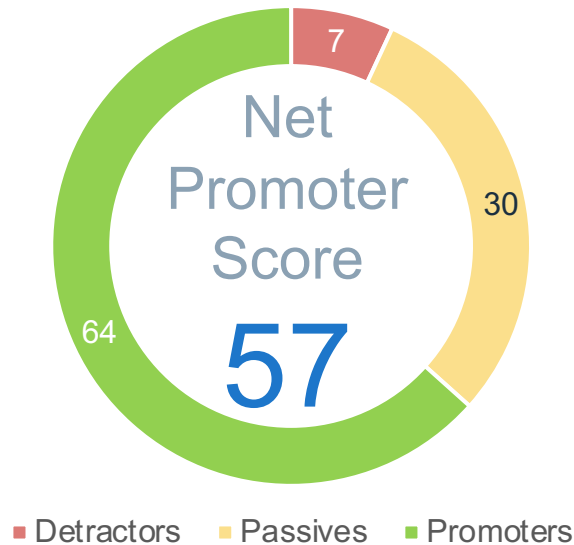
The table to the right offers some industry benchmarks for net promoter scores. Travel and tourism businesses/destinations average an NPS score of 51. This helps to illustrate the quality of the scores measured in our study, particularly the net promoter score for the region overall. These scores can be an extremely useful tools if tracked over time along with goals to increase visitor satisfaction and likelihood to recommend.

Sources: Rockport Analytics, satmetrix.com, cumstomerguru.com

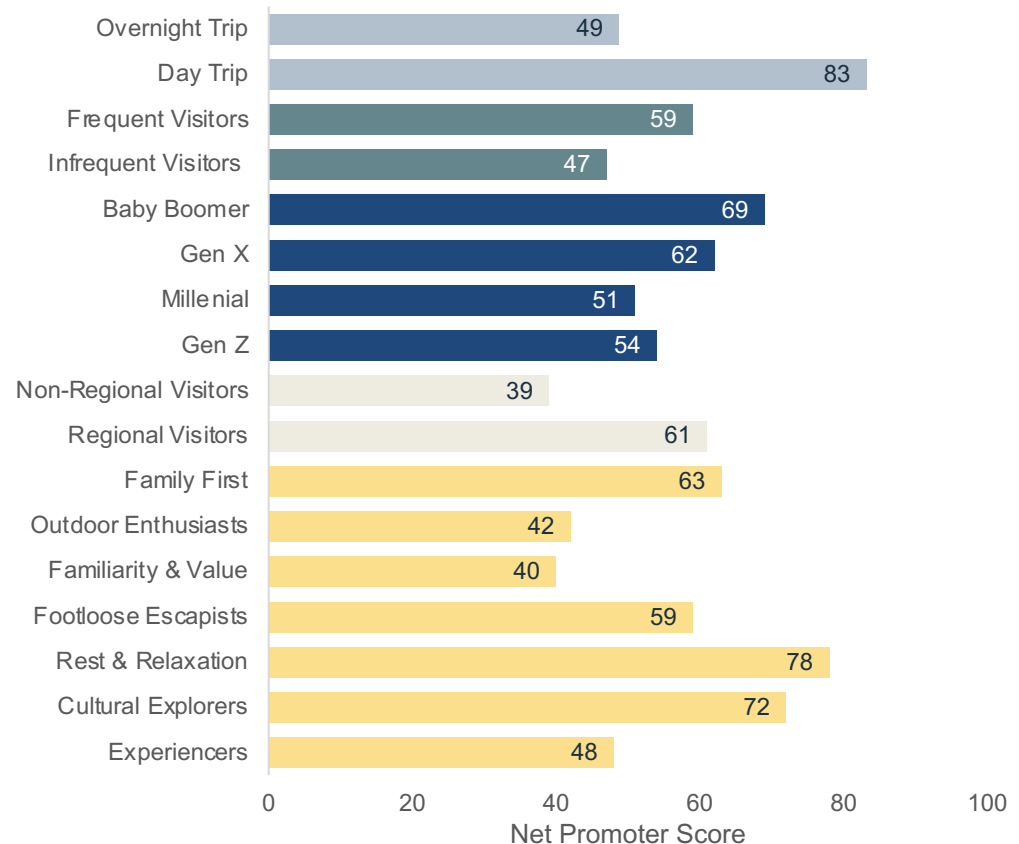
Chesapeake Bay Region Net Promoter Scores by Segment

Cultural Explorers and Rest & Relaxation segments rank highest in net promoter scores among the visitor personas for the Chesapeake Bay Region. Notably, day trippers have significantly higher net promoter scores compared to visitors staying overnight. There also appears to be a correlation between net promoter score and age with Baby Boomers scoring the highest followed by Gen Xers and both Gen Z and Millennials scoring on the low 50s. Non-regional visitors, clocked the lowest net promoter scores among all visitor segments.

Chesapeake Bay Region: All Visitors

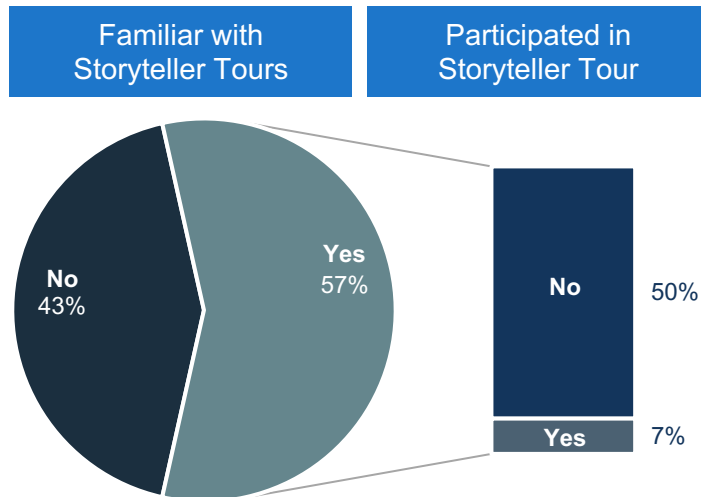


Based on your most recent visit, how likely is it that you would recommend a trip to the Chesapeake Bay Region to a friend, family member or colleague? [0=Extremely unlikely, 10 =Extremely likely]; N=667



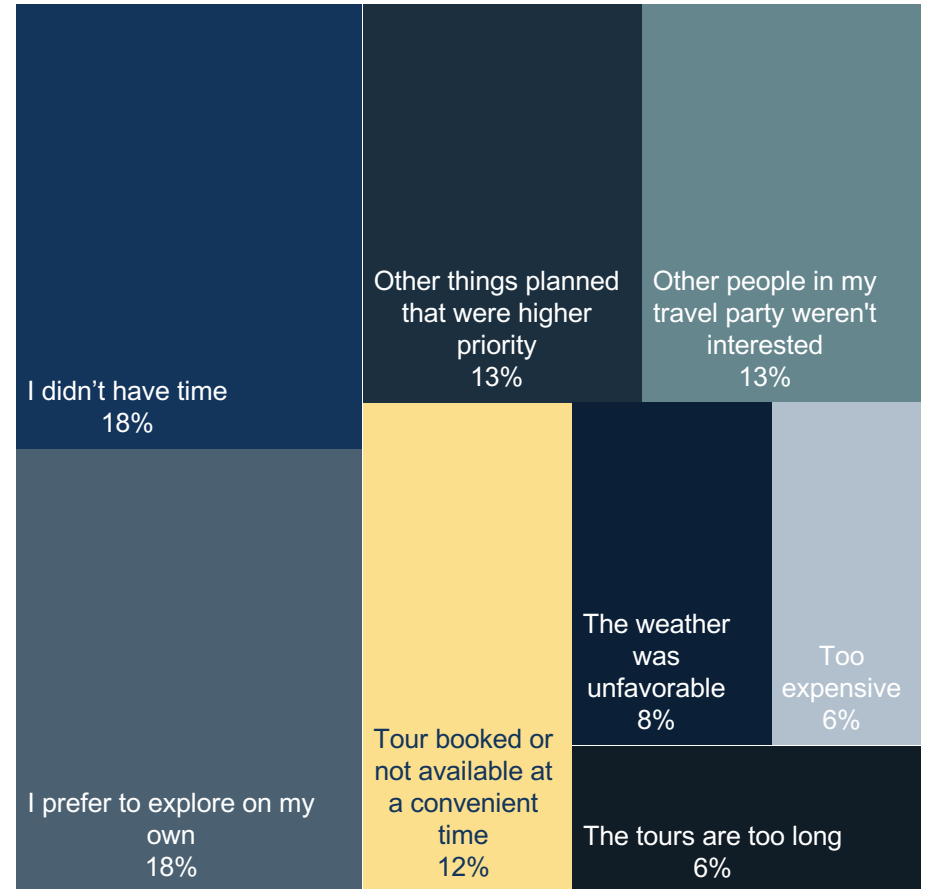
Chesapeake Bay Storytellers Tours: Visitor Awareness & Participation

While awareness of Storyteller Tours was relatively strong with 57% of respondents being familiar, participation was relatively low at only 7% of visitors. The top deterrents of taking a tour included not having the time (18%), visitors preferring to explore on their own (18%), having other things planned that were higher priority (13%), or other people in their travel party not being interested in taking a tour (13%).



Q: Are you familiar with the Chesapeake Bay Storyteller Tours? N=812
Q: Have you taken a Chesapeake Bay Storyteller Tour on any of your trips to the region? N= 461

Reasons For Not Taking a Storyteller Tour



Q: What kept you from taking a Chesapeake Bay Storyteller Tour? (Select all that apply) N=100

Chesapeake Bay Storytellers Tours: Participation and Interest

The types of tours taken by visitors were well distributed with history tours having the highest participation at 34%. Interest in storyteller tour types is highly varied by persona type. Experiencers and Cultural Explorer are interested in a variety of tour types while Rest & Relaxation visitors much more interested in a sightseeing cruise than a paddling tour or a guided hike.



Q: Which type(s) of Chesapeake Bay Storyteller Tour(s) did you take? (Select all that apply) N=440

Interest								
How likely would you be to take one of these Chesapeake Bay Storyteller Tours?	All Visitors (N=670)	Experiencers (N=170)	Cultural Explorers (N=116)	Rest & Relaxation (N=50)	Footloose Escapist (N=87)	Familiarity & Value (N=64)	Outdoor Enthusiasts (N=112)	Family First (N=71)
Water-based Tours								
Lighthouse Tour	70%	72%	79%	74%	67%	72%	61%	66%
Natural History Tour	68%	74%	81%	67%	61%	56%	61%	66%
Sightseeing Cruise	68%	73%	72%	83%	70%	67%	52%	66%
Hook and Cook/Culinary Tasting Tour	62%	73%	58%	59%	62%	66%	50%	59%
History Tour	67%	74%	82%	67%	63%	56%	51%	66%
Sailing Tour	59%	71%	62%	50%	65%	53%	51%	46%
Charter Fishing/Crabbing Tour	58%	76%	51%	54%	60%	55%	44%	54%
Paddling Tour	58%	76%	54%	30%	59%	59%	54%	47%
Watermen's Life Tour (Crabbing and Fishing)	60%	77%	53%	42%	71%	57%	44%	53%
Land-Based Tours								
Culinary Experience	64%	70%	71%	63%	68%	60%	54%	59%
History Tour	62%	69%	79%	57%	55%	52%	48%	60%
Sightseeing Tour	62%	76%	67%	63%	57%	67%	39%	60%
Fossil Tour	56%	68%	62%	37%	60%	49%	47%	49%
Guided Hike	54%	72%	56%	22%	59%	55%	40%	46%
Education Program	53%	63%	65%	37%	52%	56%	37%	43%

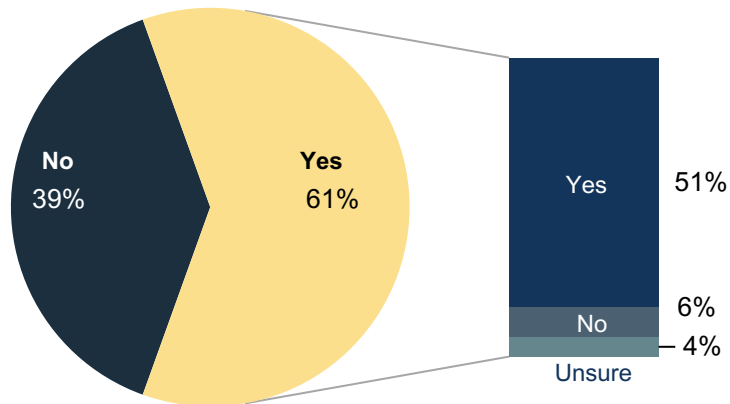
Q: How likely would you be to take one of these Chesapeake Bay Storyteller Tours? N=659

Chesapeake Bay Gateway Network Sites: Visitor Awareness & Participation

Most visitors were aware of Chesapeake Bay Gateways & Watertrails Network Sites (61%) and just over half visited one of these sites on their trip to the region. Top reasons for those that didn't visit a site included them not having the time (26%), coming to the region to do other things (22%), unfavorable weather (22%) or not knowing what is available to do or see at the sites (21%).

Familiar with CBGWN Sites

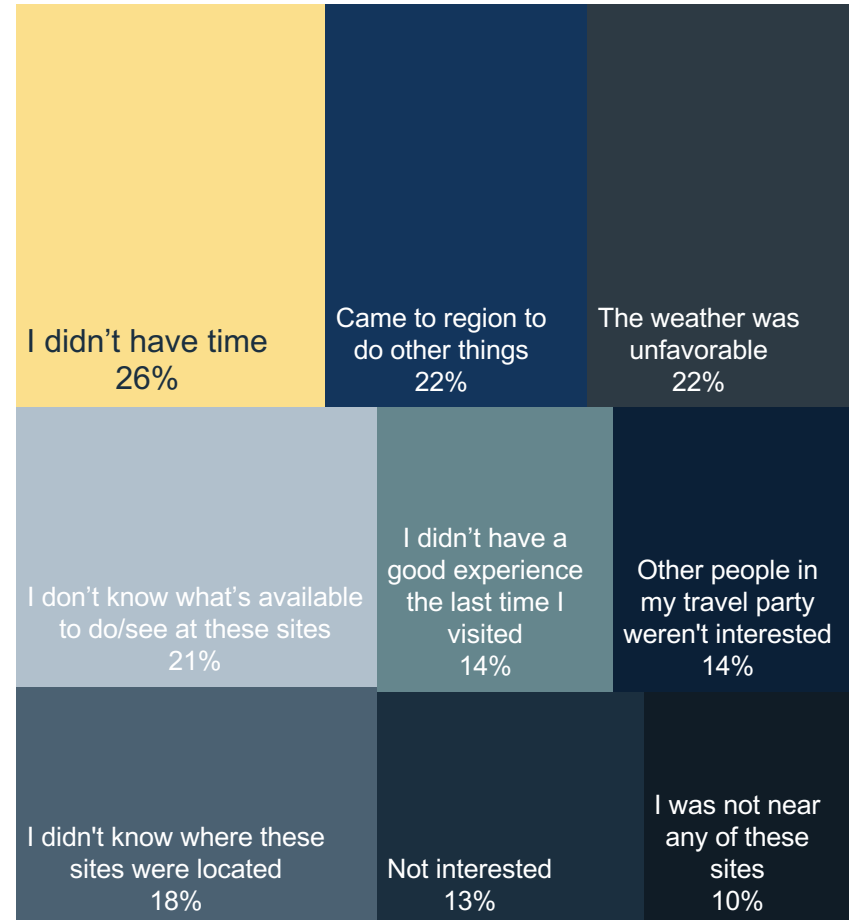
Visited CBGWN Site



Q: Are you familiar with the Chesapeake Bay Gateways and Watertrails Network sites? N=801

Q: Have you visited a Chesapeake Bay Gateways and Watertrails Network site on any of your visits to the region? N=487

Reasons For Not Visiting a CBGWN Site

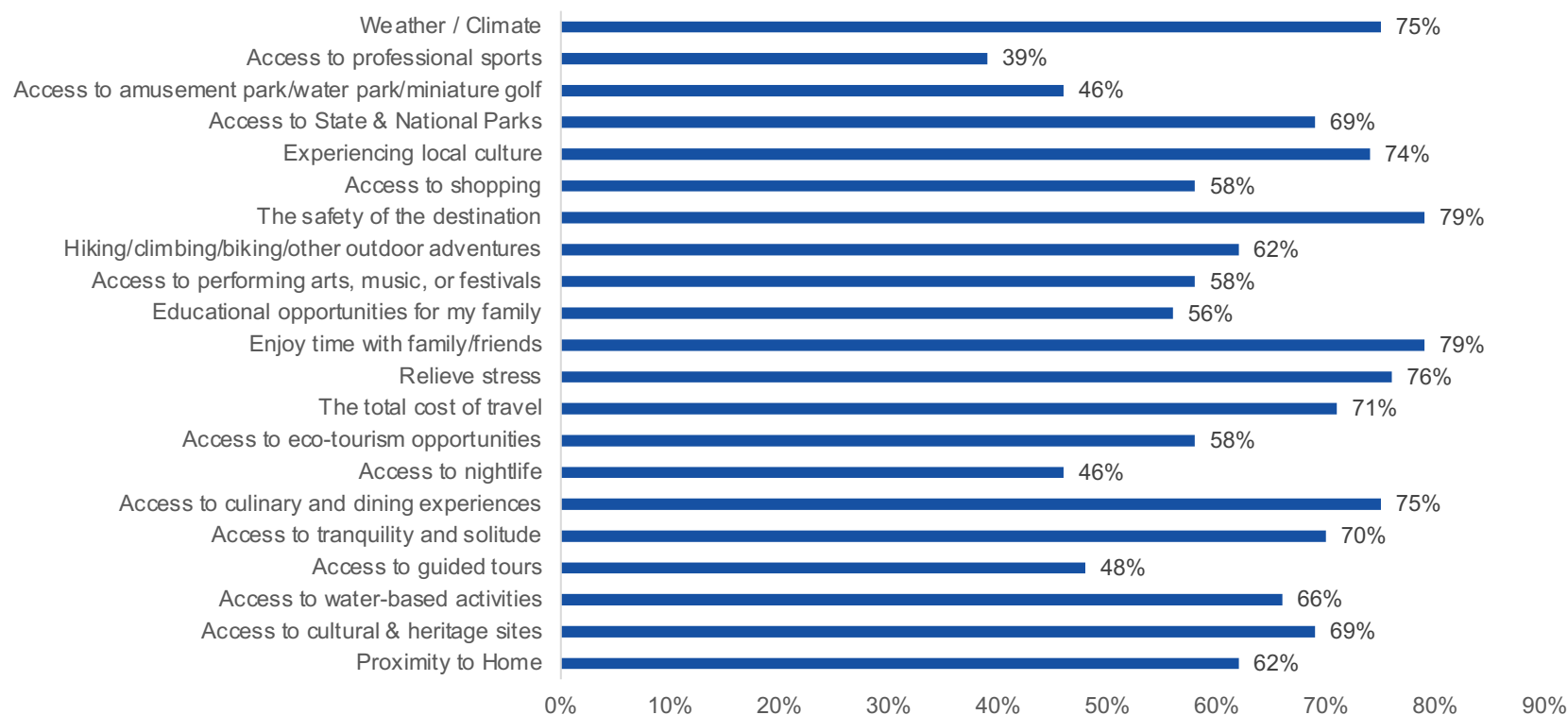


Q: What kept you from visiting a Chesapeake Bay Gateways and Watertrails Network site? (Select all that apply) N=78

Importance of Various Aspects When Choosing to Visit the Chesapeake Bay Region

The most important aspects for visitors when visiting the Chesapeake Bay Region are safety of the destination, spending time with friends and family, stress relief, access to culinary and dining experiences, weather and the ability to experience local culture. Not surprisingly, access to nightlife, professional sports and amusement parks weren't high on the list of importance for most visitors to the CBR.

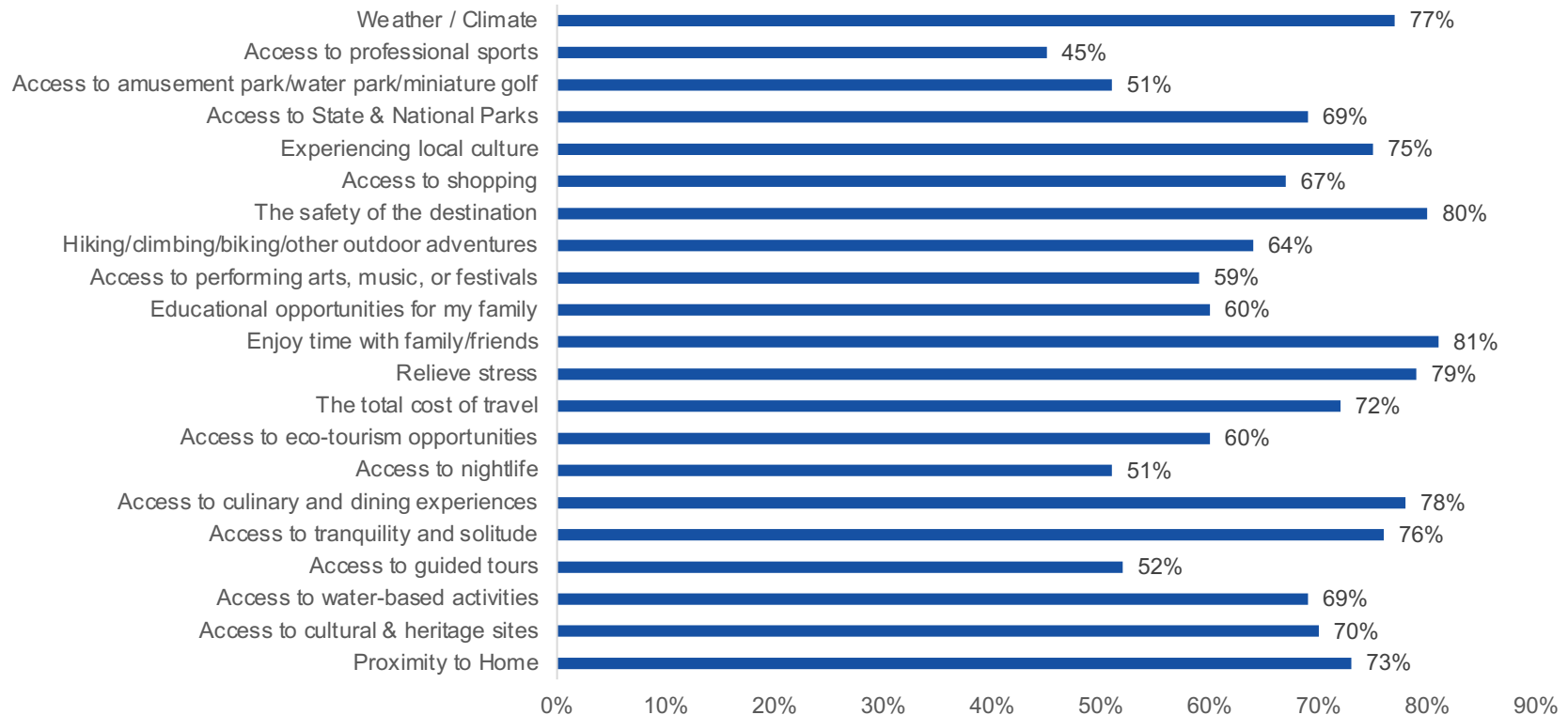
Percentage of Visitors Rating Various Aspects of Trip to the CBR as 'Moderately' or 'Very' Important



Satisfaction With Various Aspects of Trip to the Chesapeake Bay Region

Satisfaction ratings among visitors across most aspects of the Chesapeake Bay Region were high, particularly those attributes that drive visitors to the region like safety, enjoying time with friends and family, stress relief and access to dining and culinary offerings.

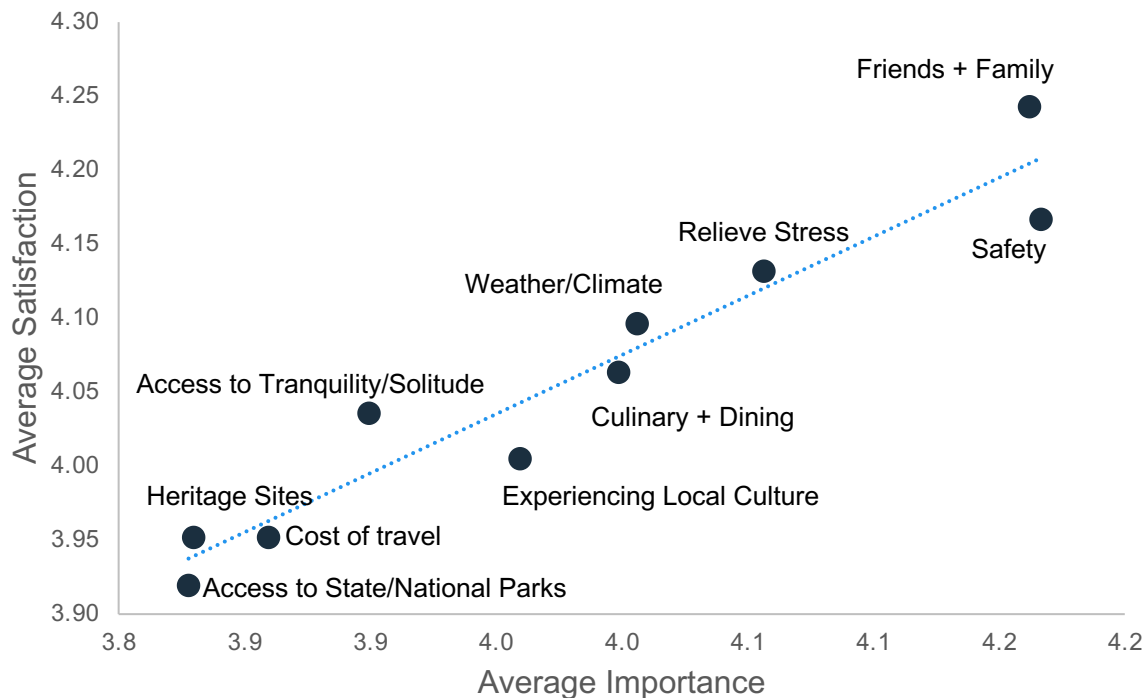
Percentage of Visitors 'Mostly' or 'Somewhat' Satisfied with Various Aspects of Trip to the CBR



Gap Analysis: Where Can the Visitor Experience Be Improved?

It is important for destination marketers to look at gaps that exist between what visitors are looking for in a travel destination with the satisfaction of those attributes when visiting the area. Importantly, when looking at the most important factors driving visitors to the CBR, the average satisfaction ratings exceed the average importance ratings, as highlighted in the table at bottom right. In this case there are no major areas of improvement but those with the smallest gaps between satisfaction (i.e., those below the trendline in the scatterplot), should be prioritized. These include safety, culinary and dining, and the ability for visitors to experience local culture.

Top Importance Attributes' Correlation With Satisfaction

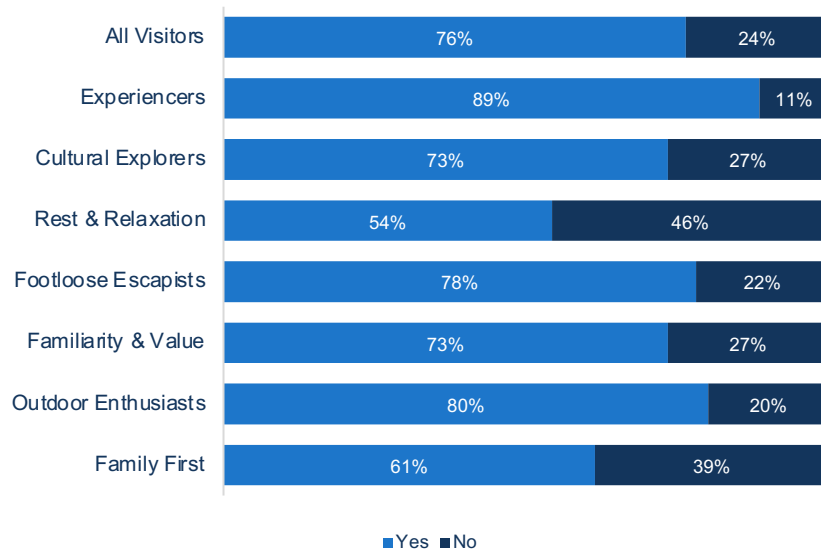


	Imp	Sat	Diff
Safety	4.2	4.2	0.00
Friend + Family	4.2	4.2	0.08
Relieve Stress	4.1	4.1	0.07
Weather/Climate	4.0	4.1	0.09
Culinary + Dining	4.0	4.1	0.06
Local Culture	4.0	4.0	0.05
Tranquility	3.9	4.0	0.14
Cost	3.9	4.0	0.09
Heritage Sites	3.8	4.0	0.12
State/National Parks	3.8	3.9	0.09

Interest in Chesapeake Bay Stewardship and Voluntourism

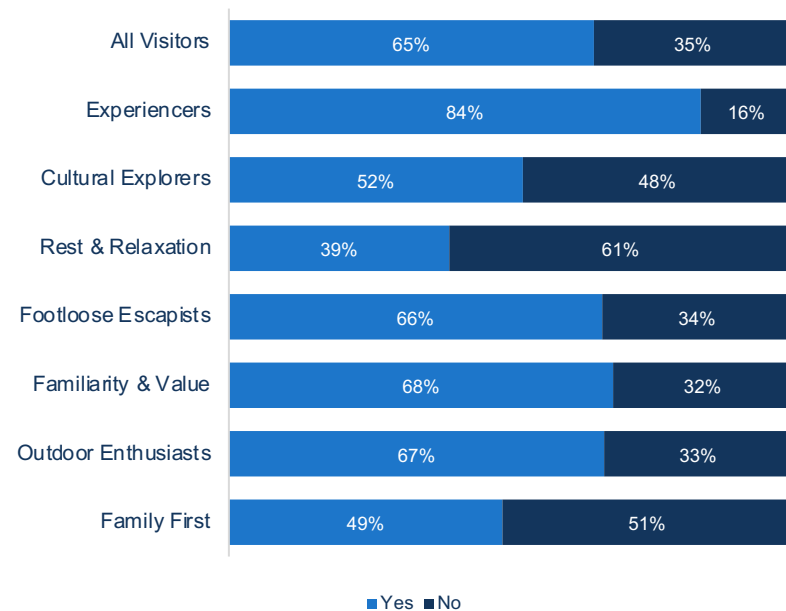
More than three-quarters of visitors are interested in learning about ways to help the Chesapeake Bay's ecology and or Bay Stewardship. Nearly two-thirds of visitors are interested in voluntourism. Experiencers are most interested in learning about ways to help the Bay ecology and/or Bay stewardship (89%) and helping through volunteer activities (voluntourism) (84%). Those in the Rest & Relaxation and Family First segments are the least likely to be interested in learning about ways to help the Bay ecology or voluntourism.

Are you interested in learning about ways to help the Bay ecology and/or Bay stewardship?



Q: Are you interested in learning about ways to help the Bay ecology and/or Bay stewardship? N=658

Are you interested in voluntourism?



Q: Are you interested in voluntourism (trips to help the Bay through volunteer activities)? N=656



VISITATION TO MARYLAND'S CHESAPEAKE BAY REGION CBR TRAVEL INTENT (OUT-OF-MARKET TRAVELERS)

Nearly Half of Travelers Surveyed Have Considered Travel to the Chesapeake Bay Region

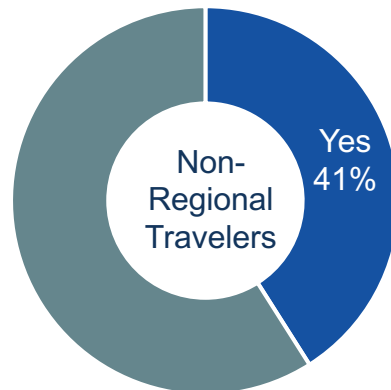
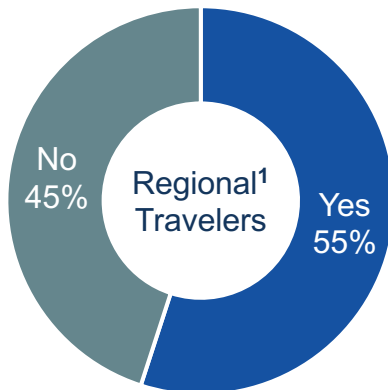
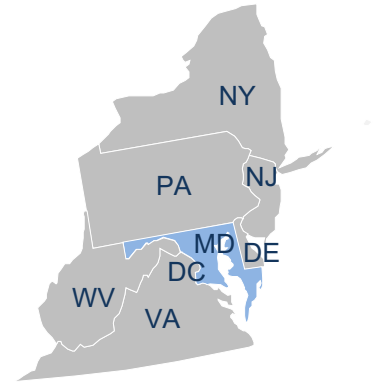
Nearly half (45%) of all travelers have considered travel to Maryland's Chesapeake Bay Region. Not surprisingly, **the proportion of regional travelers who have considered a trip to the CBR (55%) is significantly higher than the proportion of non-regional travelers considering a trip (41%)**. Of those who have considered travel, 60% might plan to visit the region over the next year, 24% over the next six months and another 36% within 6 months to a year.

Have You Considered Travel to Maryland's Chesapeake Bay Region?



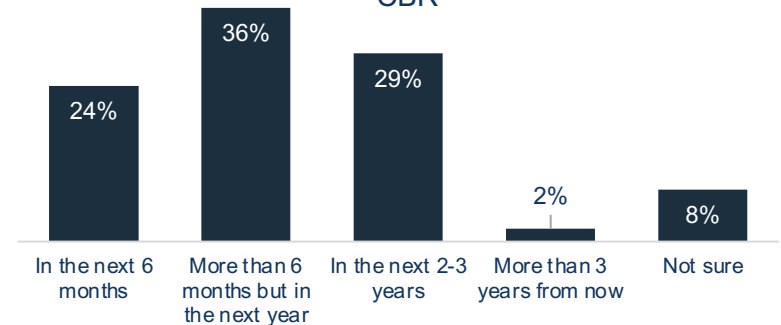
Regional travelers

include those from Maryland, Virginia, Delaware, Pennsylvania, New Jersey, New York, West Virginia, and the District of Columbia.



Q: Have you considered a trip to the Maryland Chesapeake Bay Region? N=1180

Expected Timeframe for Travel to Maryland's CBR



Q: When might you plan to visit the Maryland Chesapeake Bay Region? N=526

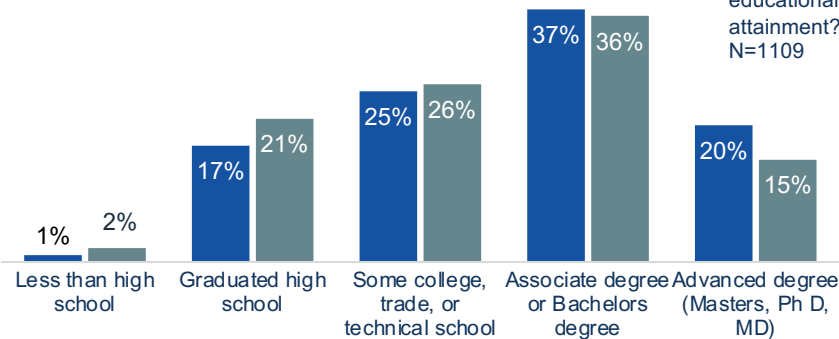
¹Regional travelers include those from MD, VA, DE, PA, NJ, NY, WV, DC. State sample sizes were insufficient to provide detailed breakouts.

Traveler Demographics

There are some noticeable demographic differences between travelers who have considered a trip to Maryland's Chesapeake Bay Region and those who haven't: Those considering CBR travel tend to be more educated (57% with some sort of college degree vs. 51%), have higher average household incomes, skew younger (particularly over-represented by Millennials) and are more likely to be married (67% vs 62%).

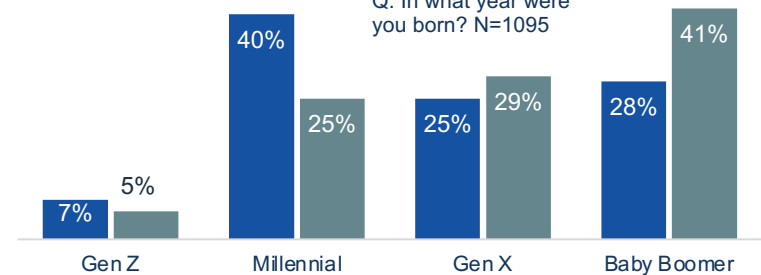
Educational Level

Q: What is your highest level of educational attainment?
N=1109



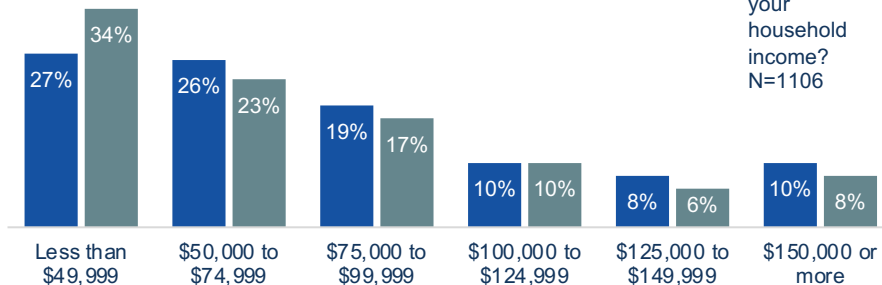
Generational Cohort

Q: In what year were you born?
N=1095



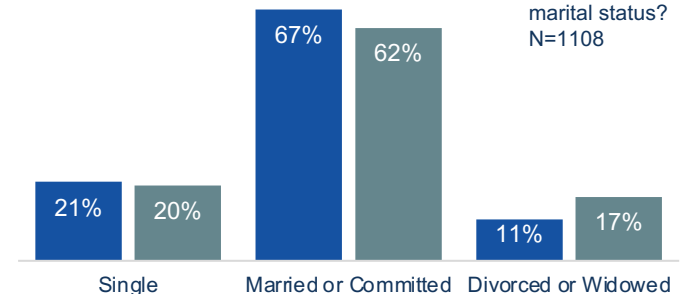
Household Income

Q: What is your household income?
N=1106



Marital Status

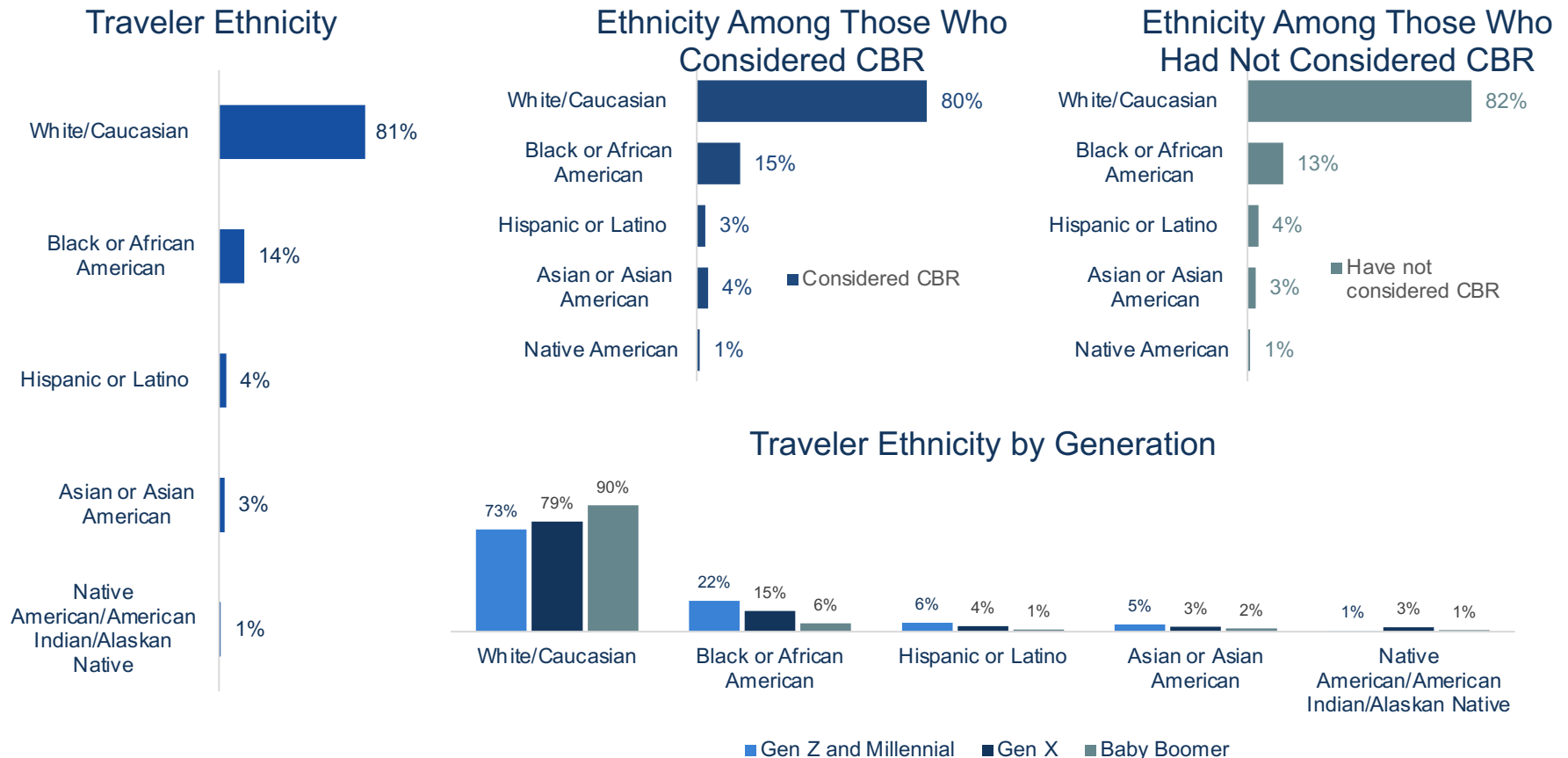
Q: What is your marital status?
N=1108



■ Considered CBR ■ Have not considered CBR

Traveler Demographics

White/Caucasians comprised the majority (81%) of out-of-market respondents. Blacks represented 14% of survey respondents who had not visited the CBR. There were only slight differences in ethnicity between those who had considered visiting the CBR vs. those who hadn't considered visiting the CBR. Among Generation Z & Millennials (age 26-41), fewer were White (73%) and more were Black (22%) compared to both the Generation X (79% White, 15% Black) and Baby Boomer (90% White, 6% Black) generations.

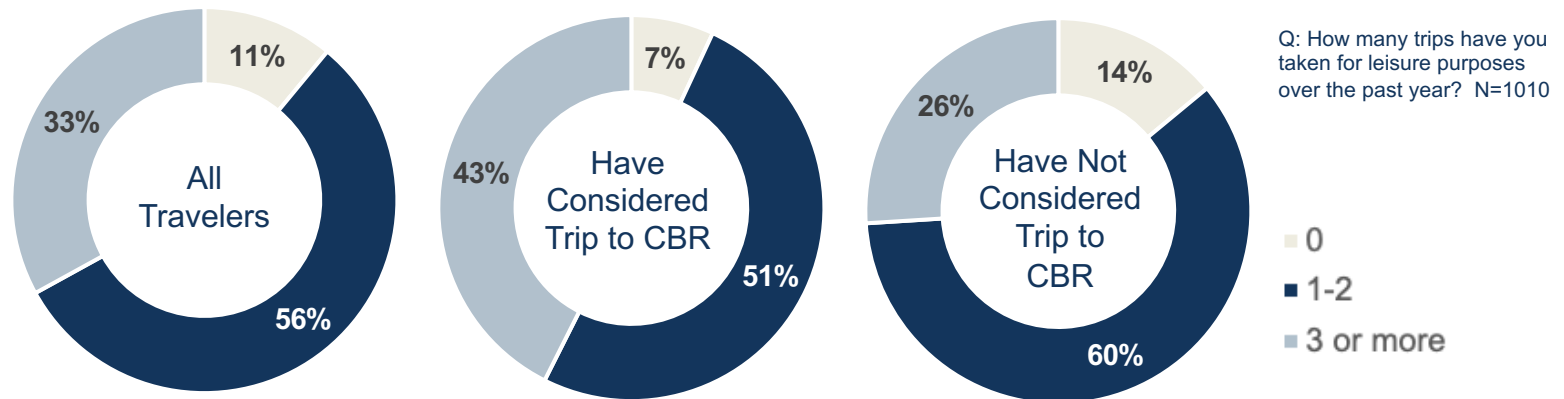


Q: Which of the following best describes your ethnicity? (Select all that apply) N=1109

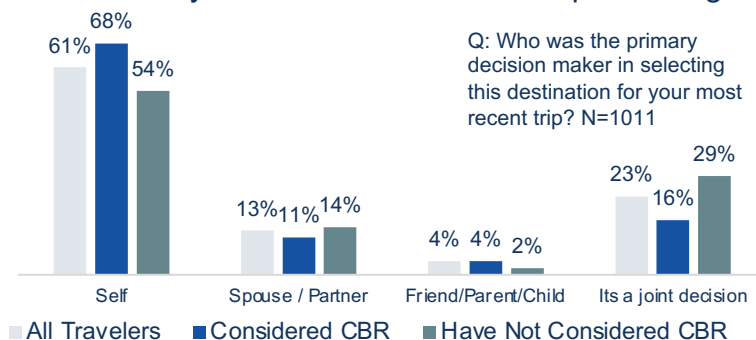
Those Who Have Considered Travel to MD's CBR Vs. Those Who Haven't

Not surprising, those who have considered a trip to Maryland's Chesapeake Bay Region are **more likely to be frequent travelers** (having taken at least three trips in the last year). These travelers are also **more likely to be the primary decision makers** when planning leisure travel and they are **more likely to have children under 18 at home**.

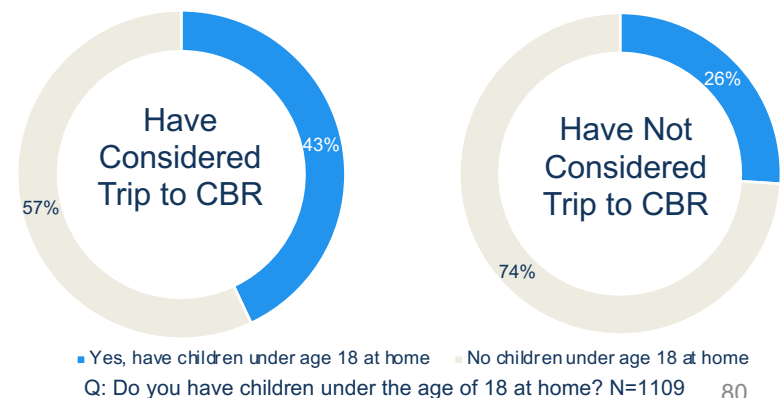
Number of Leisure Trips Taken in the Past Year



Primary Decision Maker When Trip Planning



Proportion of Travelers With Children Under 18



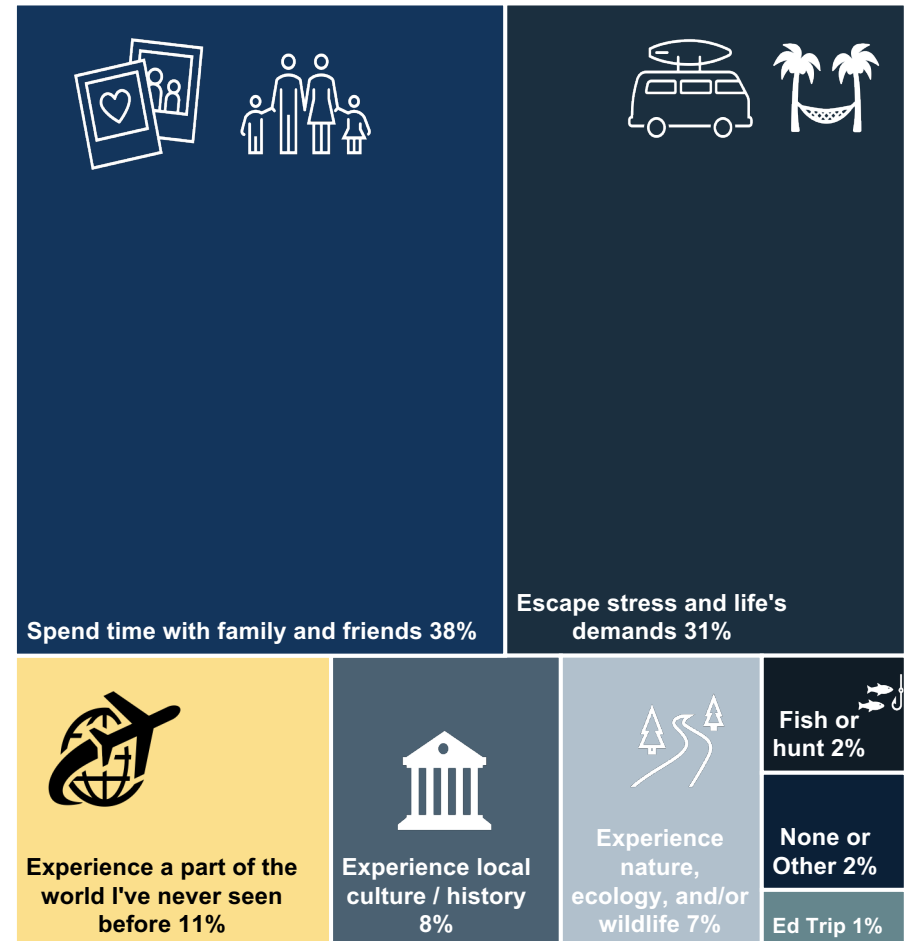
Primary Reason That Travelers Take a Leisure Trip

Most travelers selected one of two primary reasons that they typically take a leisure trip: to either **spend time with family and friends (38%)** or to **escape the stress of daily life (31%)**. These two reasons also dominated among those who have considered a trip to the CBR, although the incidence rate was slightly lower for both reasons compared to those those who hadn't considered a trip to the region.

There are a significantly higher proportion of travelers among those who have considered travel to the CBR that take a trip primarily to **experience part of the world they have never seen before, experience local culture/history, or to experience nature, ecology and wildlife.**

	All Travelers	Considered CBR	Have not considered CBR
To spend time with friends or family	38%	32%	44%
To escape from stress and the demands of daily life	31%	30%	32%
To experience a part of the world I've never seen before	11%	13%	9%
To experience local culture / history	8%	12%	5%
To experience nature, ecology, and/or wildlife	7%	9%	5%
To fish or hunt	2%	2%	2%
None of the these	2%	0%	2%
To take an educational trip	1%	2%	1%

Q: Have you considered a trip to the Maryland Chesapeake Bay Region? N=1180



Most Important Factors For Travelers When Choosing A Travel Destination



Key Factors When Selecting a Destination for a Leisure Trip

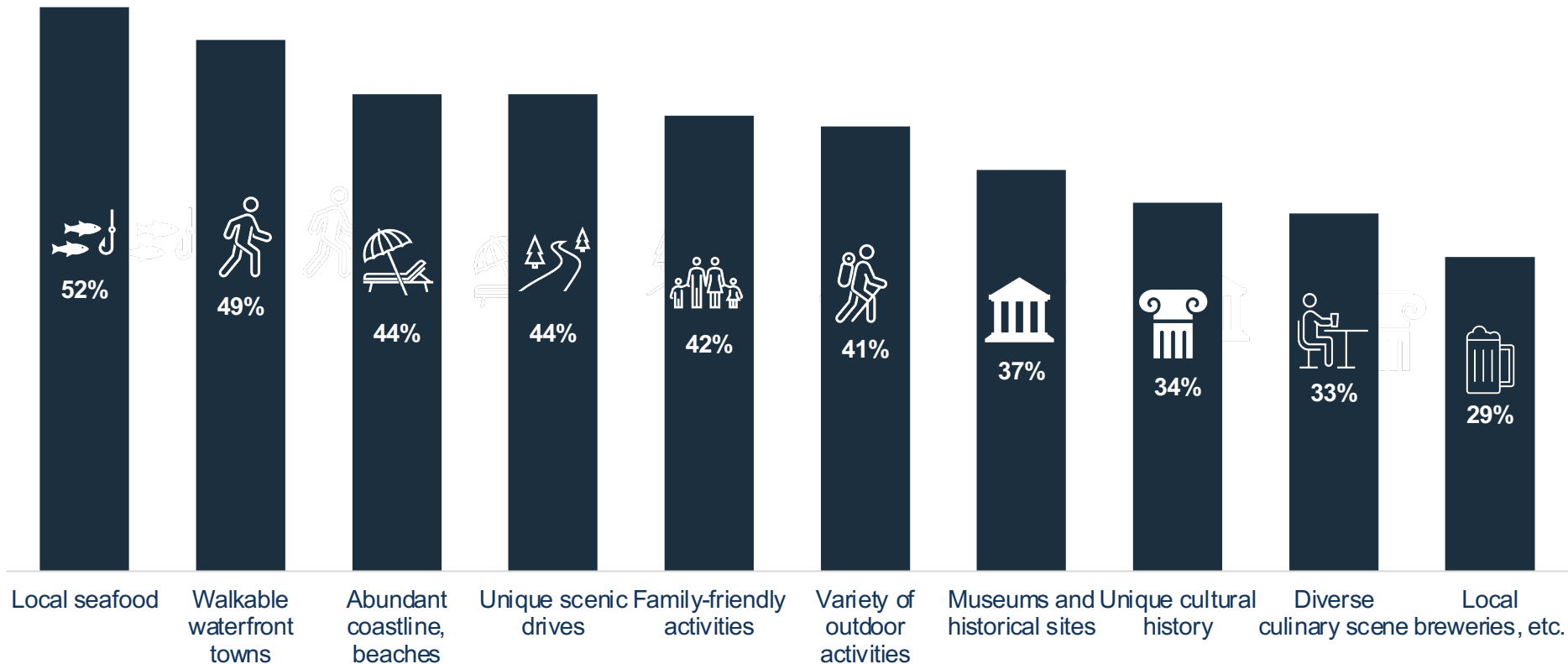
The top factors that the travelers consider when they select a leisure travel destination include, "good travel deals", "to get away from it all", and "learn about history and culture". The heat map table below highlights **key differences in the factors that drive the various personas** to select a leisure travel destination.

Destination Selection Factors by Persona (Number of Respondents)	All Travelers (N=1013)	Experiencers (N=149)	Cultural Explorers (N=111)	Rest & Relaxation (N=171)	Footloose Escapists (N=120)	Familiarity & Value (N=165)	Outdoor Enthusiasts (N=115)	Family First (N=182)
Get away from it all	75%	60%	67%	88%	88%	62%	77%	85%
Good travel deals	75%	62%	74%	88%	74%	78%	57%	82%
Learn about history & culture	71%	68%	99%	71%	69%	61%	61%	71%
Provide family time to connect	69%	68%	70%	73%	61%	58%	58%	95%
Family traditions created	66%	69%	69%	65%	58%	55%	58%	91%
Off the beaten track	63%	53%	91%	53%	73%	58%	65%	59%
Learn about natural history and wildlife	62%	64%	92%	54%	54%	62%	55%	60%
New experiences are important	58%	61%	88%	44%	63%	42%	53%	70%
Road trips	57%	46%	46%	53%	68%	70%	57%	53%
Challenges in new perspectives	56%	65%	83%	42%	56%	40%	52%	65%
Travel independently	54%	46%	54%	54%	94%	56%	53%	31%
No set itinerary	52%	50%	38%	50%	82%	39%	49%	61%
Experiences > cost	49%	67%	74%	34%	68%	21%	36%	56%
Travel sustainably	46%	65%	65%	37%	40%	41%	38%	40%
Prefer to be active	43%	56%	58%	16%	47%	45%	38%	49%
Prefer luxury hotels	40%	72%	39%	39%	59%	17%	19%	38%
Familiarity in day to day	39%	55%	20%	41%	55%	52%	18%	31%
Comfortable in budget hotels	39%	41%	37%	24%	38%	68%	37%	31%
Visit places again	35%	56%	23%	25%	56%	44%	17%	26%
Tours and not exploring alone	34%	58%	30%	22%	36%	32%	16%	33%
Book travel last minute	29%	48%	14%	10%	50%	28%	32%	26%

Q: Please indicate the level of importance of each of these factors/attributes when selecting a destination to take a leisure trip? The percentages above indicate the percentage of respondents in these cohorts who answered "Agree" or "Strongly Agree". N=1013

Top 10 Motivations for Visiting the Chesapeake Bay Region

There were a diversity of factors identified that would draw potential visitors to Maryland's Chesapeake Bay Region. The top reasons that travelers mentioned that they may be motivated to visit the Chesapeake Bay Region were local seafood, walkable waterfront towns, abundant coastline and beaches, and unique scenic drives.



Q: Which of these aspects of the Chesapeake Bay might motivate you to visit the area? (Select all that apply). These are the top 10 answers. N=1170

Motivations for Visiting the Chesapeake Bay Region By Generational Cohort

There is a clear delineation in motivations for visiting the CBR when segmenting by generational cohorts. Baby Boomers are motivated by the opportunity to visit walkable waterfront towns, explore the coastlines, and take scenic drives. Boomers are also more likely to be drawn to museums and historical sites. Gen Xers are motivated by many of the same factors as Boomers although to a lesser degree. Xers are also significantly more interested in family-friendly activities and a variety of outdoor activities, as are the Millennials. Millennials are significantly more likely to name visitation motivators outside of the top 6 or 7 on the list, including, local breweries, theme parks, Gateway & Watertrail Network sites and access to personal watersports.

Motivations by Generational Cohort (Number of Respondents)	All Travelers (N=1056)	Gen Z (N=65)	Millennial (N=333)	Gen X (N=291)	Baby Boomer (N=367)
Local seafood	52%	37%	43%	52%	61%
Walkable waterfront towns	49%	31%	42%	49%	59%
Abundant coastline, beaches	45%	37%	38%	50%	48%
Unique scenic drives	44%	28%	42%	43%	49%
Variety of outdoor activities	42%	35%	46%	48%	34%
Family-friendly activities	42%	34%	51%	49%	31%
Museums and historical sites	37%	20%	34%	37%	43%
Unique cultural history	34%	26%	34%	35%	34%
Diverse culinary scene	33%	31%	33%	33%	34%
Local breweries, etc.	30%	20%	34%	32%	26%
Fun theme parks	30%	35%	42%	32%	16%
Chesapeake Bay Gateway and Watertrails Network sites	28%	20%	32%	29%	26%
Music festivals	28%	25%	31%	31%	23%
One-of-a-kind shopping experiences	27%	25%	31%	25%	24%
Access to personal watersports	18%	15%	26%	21%	10%
Access to sailing or powerboating	14%	11%	21%	15%	8%

Q: Which of these aspects of the Chesapeake Bay might motivate you to visit the area? (Select all that apply)
N size depends on the cohort – Overall N=1056

Motivations for Visiting the Chesapeake Bay Region By Traveler Personas

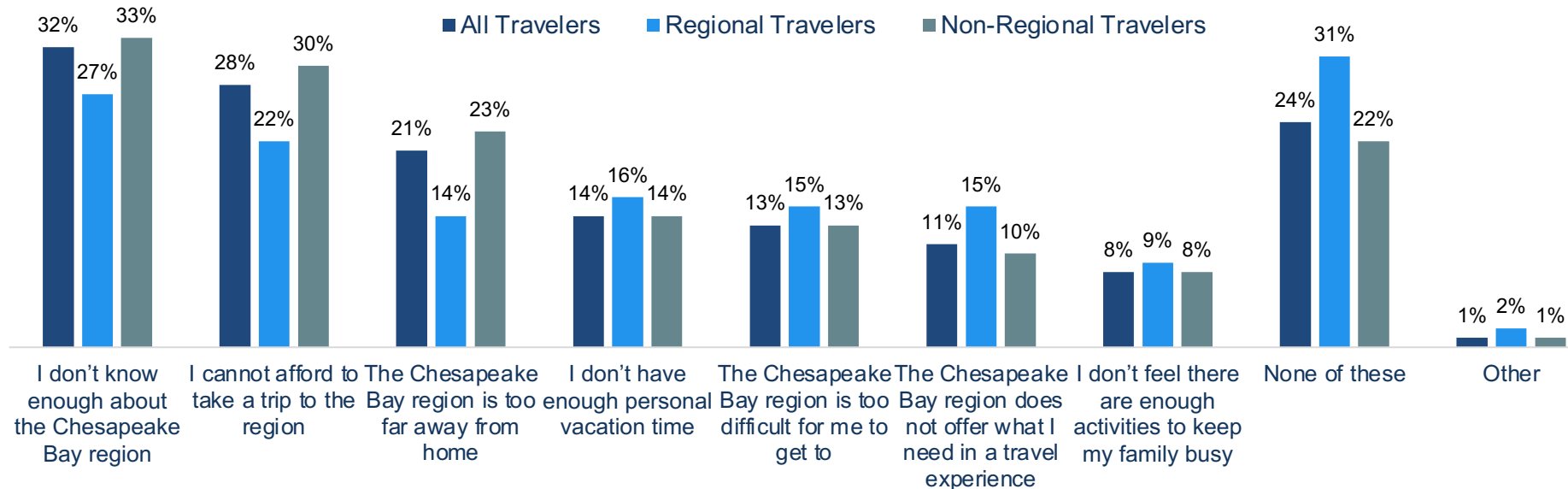
Potential motivations to visit the Chesapeake Bay Region also differ significantly across the traveler personas. While local seafood and walkable waterfront towns are relatively important for most segments, other motivations further down the list tend to pop up in various segments and highlight the need to target persona segments based on specific regional offerings & attractions. For example, Cultural Explorers, not surprisingly, are motivated by unique cultural history and Family First travelers are motivated by family-friendly activities.

Motivations by Persona (Number of Respondents)	All Travelers (N=1013)	Experiencers (N=149)	Cultural Explorers (N=111)	Rest & Relaxation (N=171)	Footloose Escapists (N=120)	Familiarity & Value (N=165)	Outdoor Enthusiasts (N=115)	Family First (N=182)
Local seafood	52%	41%	64%	62%	58%	42%	51%	47%
Walkable waterfront towns	50%	31%	71%	53%	38%	48%	57%	53%
Abundant coastline, beaches	45%	26%	58%	48%	46%	43%	45%	52%
Unique scenic drives	44%	37%	57%	46%	43%	39%	44%	47%
Family-friendly activities	43%	40%	30%	46%	28%	41%	41%	63%
Variety of outdoor activities	42%	40%	46%	35%	31%	41%	63%	45%
Museums and historical sites	37%	28%	59%	32%	32%	39%	39%	36%
Unique cultural history	35%	32%	65%	29%	31%	33%	28%	34%
Diverse culinary scene	34%	28%	55%	41%	38%	24%	29%	27%
Fun theme parks	30%	42%	8%	26%	24%	31%	25%	42%
Local breweries, distilleries, and/or wineries	29%	22%	41%	26%	29%	20%	38%	32%
Chesapeake Bay Gateway and Watertrails Network sites	28%	32%	43%	19%	22%	21%	34%	30%
Music festivals	28%	37%	26%	29%	22%	22%	32%	25%
One-of-a-kind shopping experiences	27%	29%	26%	32%	30%	21%	17%	29%
Access to personal watersports such as kayaking and paddleboarding	19%	23%	19%	6%	22%	14%	32%	20%
Access to sailing or powerboating	14%	19%	17%	9%	16%	10%	13%	15%

Q: Which of these aspects of the Chesapeake Bay might motivate you to visit the area? (Select all that apply)
N size depends on the cohort – Overall N=1066

Deterrents For Not Visiting the CBR Differ Between Regional & Non-Regional Travelers

The top deterrent for considering a trip to the CBR is not knowing enough about the area. This is particularly true for non-regional travelers with over one-third citing this as a deterrent. Non-regional travelers, not surprisingly, are also more likely to be deterred by the distance to, and cost of, traveling to the CBR. Regional travelers are less likely to list deterrents as non-regional travelers but there are still many who feel they don't know enough about the area (27%). A higher proportion of regional travelers don't feel the CBR offers what they need in a travel experience (15%) or that there are not enough activities to keep their families busy (9%). This question was asked of all survey respondents, and "none of these" likely means they were not deterred from visiting the Chesapeake Bay Region.



Q: Which of these would deter you from considering a Chesapeake Bay overnight leisure trip? (Select all that apply) N=1172

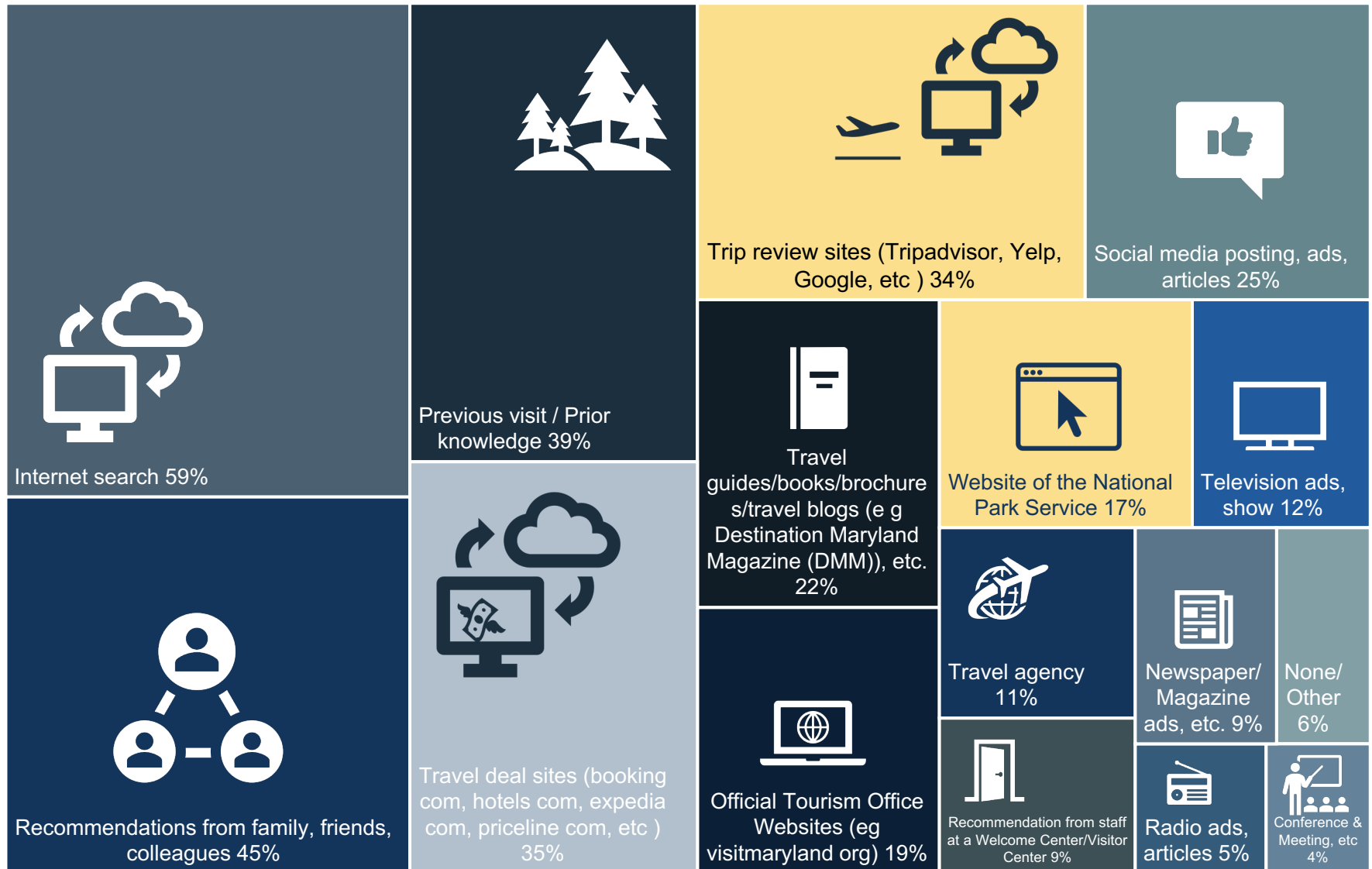
Which CBR Towns & Cities Are Travelers Interested in Visiting?

There are also some interesting differences in towns of interest when segmenting by persona segments. Not surprisingly, **Cultural Explorers, who are motivated by walkable waterfront towns, have more interest in visiting towns across the board**, while the opposite is true for other segments like the Footloose Escapist who are less likely to want to visit towns across the region.

Towns by Persona (Number of Respondents)	All Travelers (N=1013)	Experiencers (N=149)	Cultural Explorers (N=111)	Rest & Relaxation (N=171)	Footloose Escapists (N=120)	Familiarity & Value (N=165)	Outdoor Enthusiasts (N=115)	Family First (N=182)
Chesapeake Beach	52%	52%	67%	48%	48%	42%	55%	68%
Baltimore	40%	38%	46%	43%	32%	38%	38%	44%
Chesapeake City	31%	42%	31%	25%	34%	24%	31%	38%
Annapolis	29%	22%	44%	30%	25%	28%	26%	29%
Solomons Island	20%	13%	39%	13%	15%	19%	20%	25%
Cambridge	18%	20%	29%	15%	15%	13%	22%	20%
St Michaels	13%	13%	15%	14%	0.09	10%	13%	15%
Salisbury	11%	13%	18%	4%	10%	13%	13%	9%
St Mary's City	11%	15%	15%	9%	10%	10%	10%	12%
Chestertown	10%	13%	9%	5%	14%	11%	12%	11%
Havre de Grace	9%	7%	14%	8%	9%	7%	10%	8%
Pocomoke City	9%	13%	14%	4%	9%	10%	10%	10%
Rock Hall	8%	9%	10%	4%	8%	5%	10%	12%
North East	7%	15%	10%	1%	8%	5%	4%	7%
Easton	6%	12%	10%	3%	3%	4%	7%	6%
Galesville	6%	11%	8%	4%	6%	5%	5%	3%
Crisfield	5%	9%	5%	1%	8%	5%	3%	2%
Kent Narrows	5%	7%	9%	1%	7%	4%	8%	3%
Leonardtown	3%	5%	6%	2%	3%	4%	2%	2%
None of the above	2%	1%	1%	2%	3%	3%	2%	1%

Q: Which of the following towns would you be interested in visiting on a trip to the Chesapeake Bay Region? (Select all that apply) N=1056

Trip Planning & Information Sources



Trip Planning & Information Sources By Personas

Internet searches, recommendations from family and friends and prior visits to a destination are travelers key information sources used when planning a trip. The ranking of these planning sources generally doesn't differ through the top 5 sources except in a few cases. Cultural Explorers are more likely to over-index across planning sources while the Footloose Escapist tend to use fewer sources across the board. Cultural Explorers are the most likely to use an internet search.

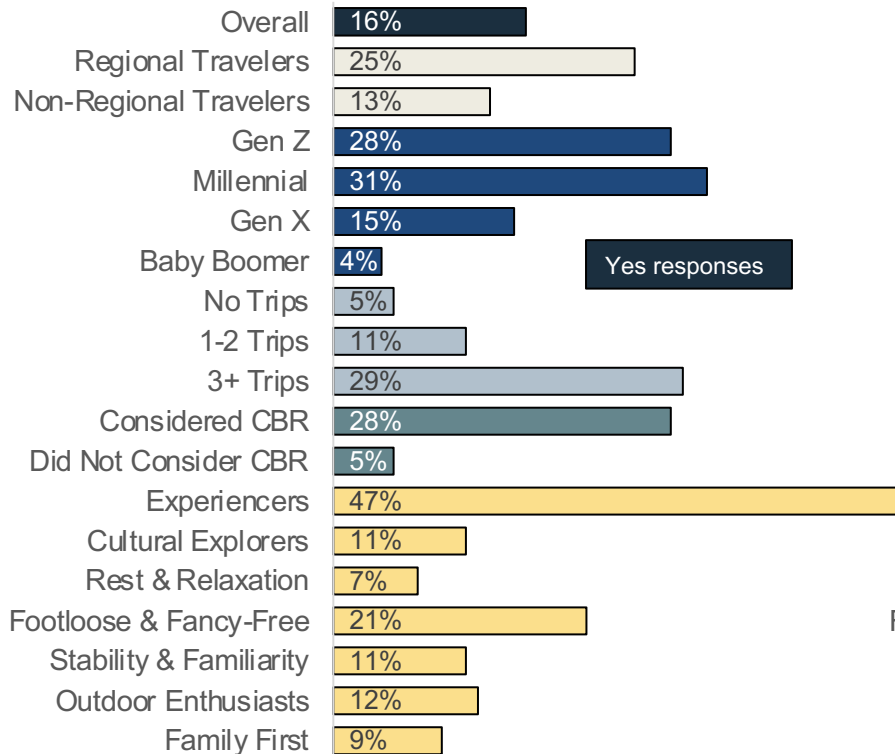
Information Sources by Persona (Number of Respondents)	All Travelers (N=1013)	Experiencers (N=149)	Cultural Explorers (N = 111)	Rest & Relaxation (N=171)	Footloose Escapists (N=120)	Familiarity & Value (N=165)	Outdoor Enthusiasts (N=115)	Family First (N=182)
Internet search	59%	51%	82%	59%	54%	48%	58%	65%
Recommendations from family/friends	46%	38%	50%	48%	38%	45%	50%	52%
Previous visit / Prior knowledge	39%	23%	53%	41%	35%	41%	37%	42%
Travel deal sites -booking com, etc.	36%	37%	46%	37%	22%	29%	37%	40%
Trip review sites - TripAdvisor, etc.	35%	39%	45%	39%	29%	25%	32%	37%
Social media	26%	36%	28%	19%	22%	19%	26%	32%
Travel guides/books, etc.	23%	27%	37%	16%	22%	22%	23%	20%
Official Tourism Office Websites	19%	22%	32%	17%	24%	17%	14%	14%
Website of the National Park Service	18%	18%	32%	10%	16%	18%	25%	14%
Travel agency	12%	28%	12%	8%	12%	8%	7%	9%
TV ads, show	12%	15%	16%	9%	14%	10%	7%	13%
Recommendation from Welcome Center staff	9%	13%	16%	4%	8%	8%	5%	12%
Newspaper/Magazine ads, etc.	9%	13%	18%	8%	8%	9%	5%	7%
Radio ads, articles	5%	12%	5%	2%	6%	7%	0%	3%
Conference & Meetings, etc.	4%	12%	2%	1%	8%	2%	2%	2%

Chesapeake Bay Storytellers Tours

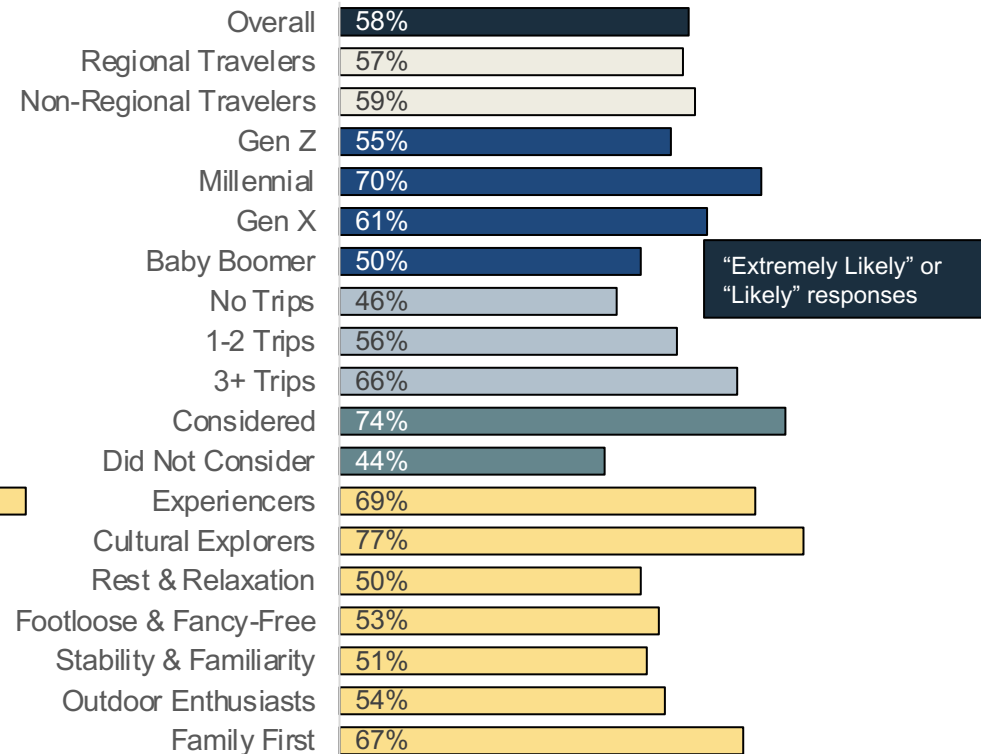
Overall, Chesapeake Bay Storyteller Tours awareness is relatively low (16%). Regional travelers, younger travelers (Gen Z, Millennial), frequent travelers (those who have taken 3+ trips), Experiencers, and those who have considered a trip to Chesapeake Bay Region were more aware of the tours than their counterparts. **The likelihood to take a tour was relatively high (58%) which implies that increasing awareness would significantly raise tour participation.**

Millennials, those considering a visit to the CBR, and Cultural Explorers, Experiencers and Family First are most likely to take a tour.

Storyteller Tour Awareness



Likelihood to Take a Storyteller Tour



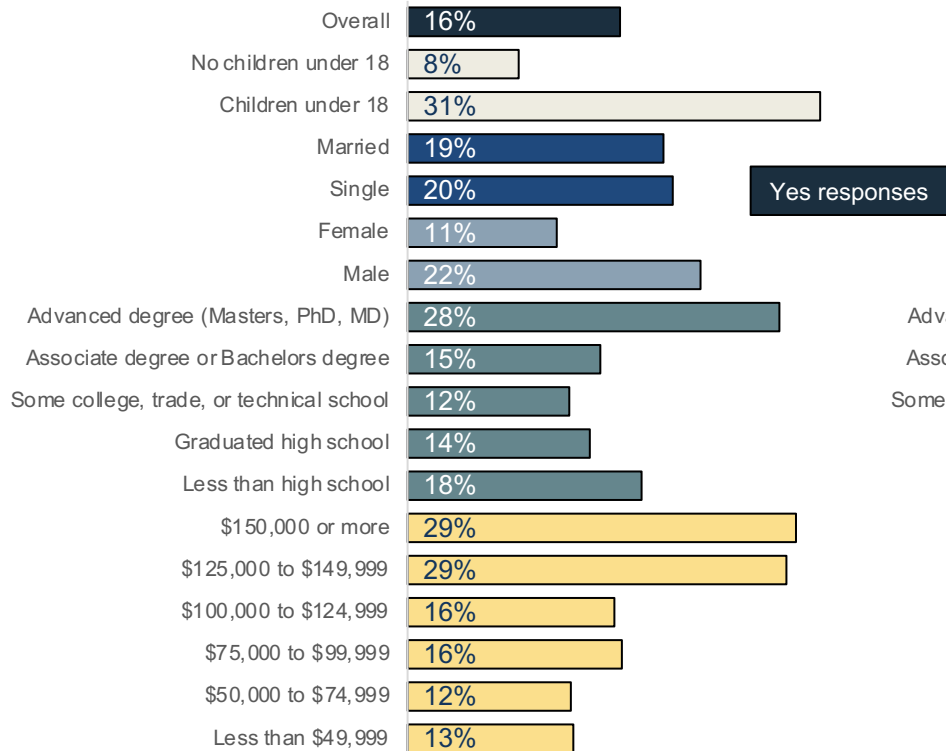
Q: Are you familiar with the Chesapeake Bay Storyteller Tours?
N size depends on the cohort. Overall N=1162

Q: How likely would you be to take a Chesapeake Bay Storyteller Tour?
N size depends on the cohort. Overall N=1149

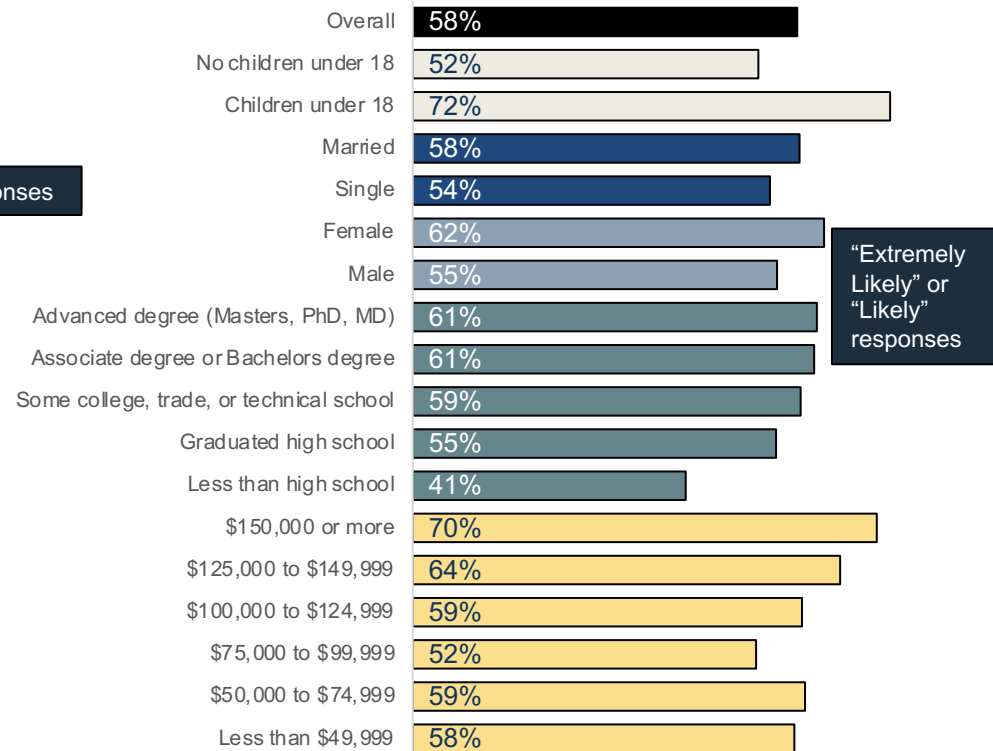
Chesapeake Bay Storytellers Tours

Chesapeake Bay Storyteller Tour awareness by demographics indicates that those with children under age 18 at home are most likely to be aware of Storyteller Tours (31%). Those with incomes of \$125k and above (29%) plus people with advanced degrees (28%) are also more likely to be aware of the tours. Males are twice as likely (22%) as females (11%) to indicate that they're aware of the tours, and single people (20%) are slightly more likely than married people (19%) to be aware. The most likely demographic to take a tour are those with children under the age of 18 at home, followed closely by those in the income bracket of \$150k and above (70%).

Storyteller Tour Awareness



Likelihood to Take a Storyteller Tour



Q: Are you familiar with the Chesapeake Bay Storyteller Tours?
N size depends on the cohort. Overall N=1162

Q: How likely would you be to take a Chesapeake Bay Storyteller Tour?
N size depends on the cohort. N=1149

Interest in Chesapeake Bay Storytellers Tours Based on Tour Type

The top water-based tours that travelers would be likely to take include **sightseeing cruises, lighthouse tours and history/natural history tours**. Land-based tours that top the list include **sightseeing tours, history tours and culinary experiences**. Millennials are significantly more likely than Baby Boomers to be interested in different types of tours across the board, with the only exception being land-based history tours. Those who have considered a trip to the region are also significantly more likely to take a variety of tours relative to those who haven't considered a trip to the CBR.

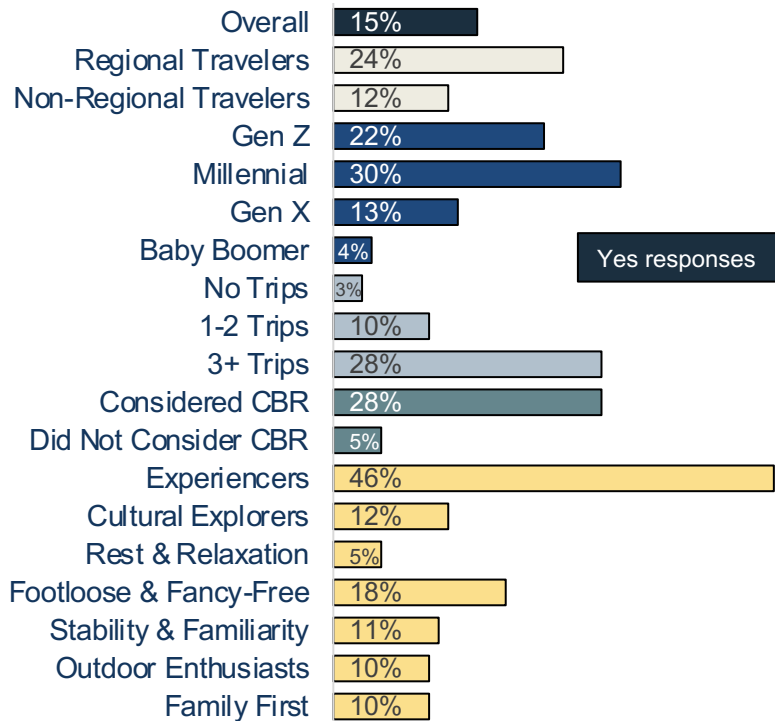
Interest in CBST (Number of Respondents)	Overall (N=1050-1154)	Regional Travelers (N=308-311)	Non- Regional Travelers (N=836-843)	Gen Z (N=64-65)	Millennial (N=332-334)	Gen X (N=290-291)	Baby Boomer (N=361-367)	Considered CBR (N=515-519)	Have Not Considered CBR (N=630-636)
Water Experiences									
Sightseeing Cruise	73%	73%	73%	75%	75%	74%	72%	82%	67%
Lighthouse Tour	72%	72%	71%	70%	78%	73%	68%	85%	59%
History Tour	66%	66%	66%	56%	74%	72%	60%	84%	59%
Natural History Tour	65%	63%	66%	66%	75%	69%	57%	79%	56%
Hook and CookTour	58%	59%	58%	66%	73%	62%	46%	75%	54%
Charter Fishing/Crabbing Tour	50%	49%	50%	52%	66%	55%	36%	68%	36%
Sailing Tour	49%	51%	48%	57%	63%	53%	34%	67%	38%
Watermen's Life Tour	43%	42%	44%	46%	55%	53%	27%	63%	33%
Paddling Tour	41%	41%	40%	54%	58%	45%	22%	59%	30%
Land Experiences									
Sightseeing Tour	71%	70%	72%	65%	76%	71%	70%	78%	66%
History Tour	66%	65%	67%	58%	67%	69%	66%	77%	60%
Culinary Experience	64%	63%	65%	66%	71%	64%	61%	36%	21%
Fossil Tour	52%	54%	51%	58%	63%	53%	40%	67%	42%
Guided Hike	45%	49%	43%	58%	60%	47%	29%	62%	32%
Education Program	39%	41%	39%	48%	51%	39%	30%	56%	30%

Likely or
Extremely
Likely

Chesapeake Bay Gateway Network Sites

Awareness of the CB Gateway Watertrails & Network sites tracks that of the Storyteller Tours with only 15% of potential travelers having familiarity. Those most likely to be aware include regional travelers (24%), Millennials (30%), frequent travelers (28%), those who have considered a trip to the CBR (28%) and Experiencers (46%). There are several potential programs that would help to drive CBGWNS visitation led by culinary experiences (65%), historic boat tours (64%), history tours (62%) and wildlife programs (56%).

Familiarity with CBGWNS



Likelihood to Visit Various CBGNWS Based on Programming



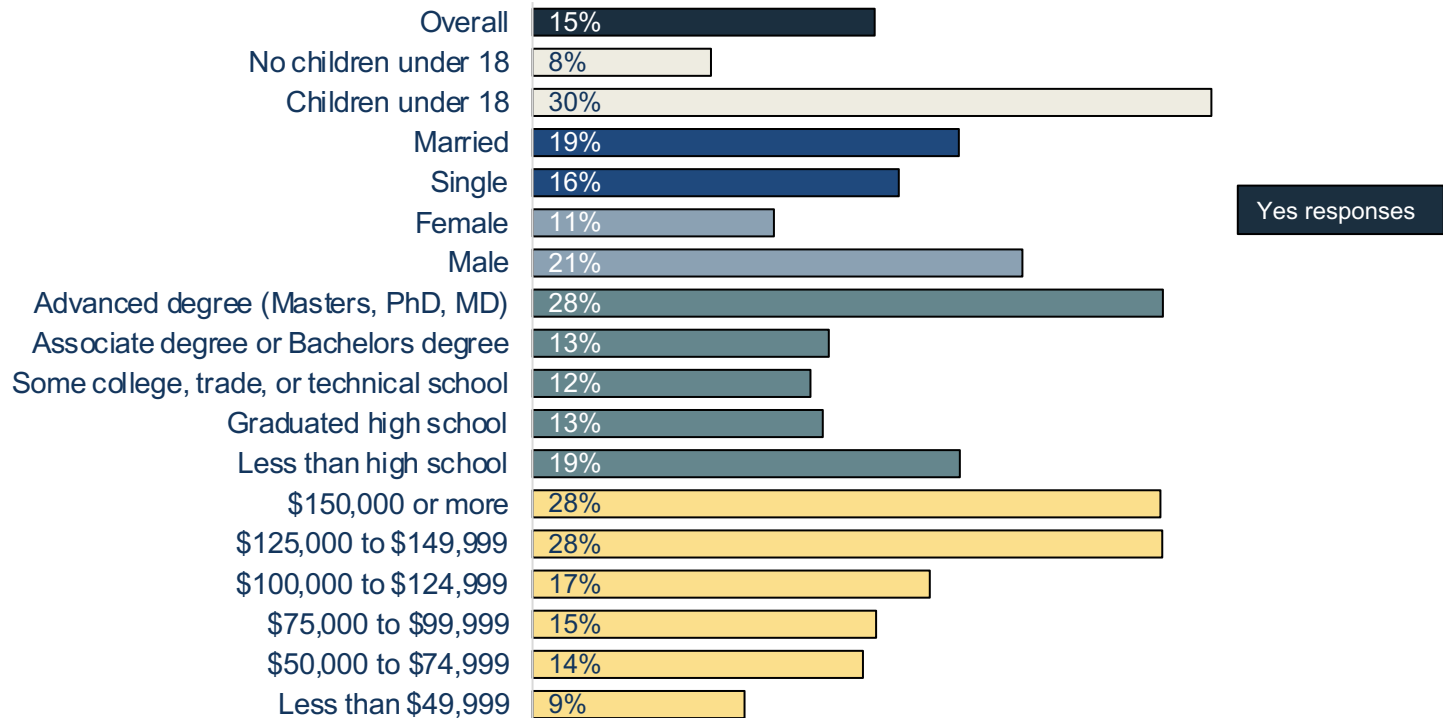
Q: Are you familiar with the Chesapeake Bay Gateway and Watertrails Network sites?
N size depends on the cohort. Overall N=1134

Q: How likely would you be to visit one of the Chesapeake Bay Gateways and Watertrails Network sites if they offered these programs?
These include the percentage of respondents who answered they were "Likely" or "Extremely likely" Overall N=1051

Chesapeake Bay Gateway Network Sites

From a demographic perspective, awareness of the Chesapeake Bay Gateway Watertrails & Network sites is highest among those who have children under the age of 18 at home (30%). Those with advanced degrees (28%) and incomes of \$125k and above (28%) are more likely to be aware of the Gateway Network Sites. Males are more likely (21%) to say they're aware of the sites than females (11%), and those who are married (19%) are more likely than those who are single (16%).

Familiarity with CBGWNS



Q: Are you familiar with the Chesapeake Bay Gateway and Watertrails Network sites?
N size depends on the cohort. Overall N=1134

Chesapeake Bay Gateway Network Sites: Program Offerings

The top three programs that would attract visitors to the CBGWNS are Culinary Experience, Historic Boat Tour, and History Tour. Like the Storyteller tours, Millennials and those who have considered a trip to the Chesapeake Bay Region are much more likely to be drawn to programs across the board. History tours are the only offered program that would attract Baby Boomers at the same rate as Millennials.

Interest in CBGWN (Number of Respondents)	Overall (N=1048-1137)	Regional Travelers (N=303-307)	Non- Regional Travelers (N=822-831)	Gen Z (N=64-65)	Millennial (N=332-334)	Gen X (N=288-291)	Baby Boomer (N=361-367)	Considered CBR (N=508-511)	Have Not Considered CBR (N=620-626)
Ranger Program	41%	44%	39%	36%	52%	44%	31%	63%	31%
History Tour	62%	62%	62%	51%	64%	62%	64%	75%	55%
Education Program	40%	41%	40%	45%	50%	41%	33%	58%	28%
Guided Hike	46%	50%	44%	54%	59%	50%	31%	63%	39%
Culinary Experience	65%	65%	65%	65%	73%	67%	59%	76%	58%
Bird ID Hike	40%	43%	39%	42%	53%	43%	30%	62%	33%
Plant ID Hike	39%	43%	38%	49%	53%	41%	27%	57%	27%
Paddling Tour	40%	39%	40%	55%	56%	44%	21%	61%	34%
Bike Tour	38%	42%	37%	50%	57%	45%	16%	57%	31%
Wildlife Program	56%	55%	57%	63%	66%	60%	45%	68%	48%
Historic Boat Tour	64%	62%	65%	49%	69%	69%	61%	80%	57%

**“Extremely
Likely” or
“Likely”**

Q: How likely would you be to visit one of the Chesapeake Bay Gateways and Watertrails Network sites if they offered these programs?
N size depends on the questions answered & the cohort. N varies between 1048-1137



VISITATION TO MARYLAND'S CHESAPEAKE BAY REGION

INSIGHT & RECOMMENDATIONS

Additional Insight & Recommendations

- **Gap analysis points to high satisfaction scores amongst visitors** across various attributes when comparing the importance scores of those same attributes. When looking at the most important drivers of visitation, areas of focus should include the development (or better positioning of) **regional dining and culinary options, ways for visitors to experience local culture and the safety of the region.**
- **Regional visitors should be the primary visitor target for MOTD, but non-regional visitors can be viable marketing targets as well** with only 23% of non-regional visitors reporting the distance away from their home as a deterrent for travel to the Chesapeake Bay Region. The maritime culture of the region gives travelers from many regions a different and unique travel experience while providing a familiar thread to visitors from other coastal origins with its offerings like boating, sport fishing and maritime history.
- **The top deterrent for potential visitors not visiting the CBR was not knowing enough about the area (32%).** This was particularly true for non-regional visitors (33%) but even a large proportion (27%) of regional visitors claimed to not know enough about the CBR. **This is an opportunity for MOTD and its partners to market to this segment and inform these potential visitors of the attributes that the CBR has to offer as a travel destination.** Those in the Rest & Relaxation and Footloose Escapists segments were most likely to claim they “didn’t know enough about the area.”
- **Recent visitors’ desire for an opportunity to experience Chesapeake Bay culture indicates a clear demand for Storyteller Tours.** Potential visitors have very low levels of tour awareness but high levels of interest in participation in various types of tours. Top water-based tours of interest include sightseeing cruises, lighthouse tours, and history tours and top land-based tours of interest include sightseeing tours, history tours, and culinary experiences. Further research would be needed to test their price sensitivity to paying for tours of different types but clearly an opportunity exists for businesses marketing ST tours.

Additional Insight & Recommendations (continued)

- **Improving Net Promoter Scores is a proven way to generate more champions for a destination and drive visitor volume.** The Chesapeake Bay Region does not have many detractors (those who are extremely unlikely to recommend the destination to family or friends) but there are a fair number of Passives (those that are neither likely nor unlikely to recommend). **Converting these Passives into Promoters should be a key priority for stakeholders to help grow visitor volume, overnight stays and economic impact.**
- **There are several ways that MOTD can boost visitor NPS scores. The first is focusing on the segmentations outlined in this study, particularly those with lower NPS scores, and seek opportunities for development of destination assets (or more targeted promotion of existing assets) that align with visitor preferences.** For example, Familiarity & Value travelers are looking for affordable storyteller tours focused on sightseeing. Experiencers are looking for more nightlife and dining opportunities and outdoor enthusiasts a larger variety of outdoor activities, particularly water-based activities.
- Also, **analyzing the satisfaction of destination attributes influence on overall NPS scores, can give MOTD guidance as to the most important measures to improve in order to drive higher NPS.** When conducting regression analysis across various attributes, those with the most influence on NPS include satisfaction with their ability to enjoy time with friends and family, satisfaction with the safety of the destination, satisfaction with experiencing local culture and satisfaction with access to dining and culinary options. Focusing on continual improvement of these factors will drive improvement in visitor NPS.
- **Cultural Explorers** are a natural visitor target for MOTD. They represent 1.5 million annual visitors, they are highly interested in the history and culture of the region and taking part in these types of activities, including taking storyteller tours (77% of potential CE visitors are likely to take a tour); they are also interested in unique dining opportunities and visiting quintessential Chesapeake Bay Region towns. Cultural Explorers who have not visited the region make up 11% of potential visitors and 50% of these potential travelers have considered a trip to the region. Search marketing would be a prime channel to reach Cultural Explorers, and they are significantly more likely to use an internet search when planning a trip.

Additional Insight & Recommendations (continued)

- **Experiencers** are interested in activities that might not be thought of as traditional CBR offerings like sporting activities or nightlife. Experiencers have longer than average lengths of stay (most often in hotels), spend more per trip than average and drive economic impact and visitor yield. They have the youngest average age (36) among the persona segments and the highest average incomes (\$127k). They are also most likely to have children under 18 (82%). True to their name, Experiencers like to experience everything. Of potential visitors to the CBR, Experiencers are more likely to take a variety of storyteller tours and participate in a variety of activities. Experiencers are also more likely to use a variety of information sources when planning their trip to the CBR, and the most common tool for trip planning among Experiencers is the Visit Maryland Website.
- **Rest & Relaxation** visitors tend to be older and are significantly less likely to have children under 18 than any other segment. They also have the lowest annual household incomes of any persona segment, although at an average household income of \$98,000 they are still well above the US average. They are a fruitful target for MOTD for several reasons: R&R visitors are more likely to be retired and have the longest average lengths of stay, which drives higher-than-average visitor spend (\$1,098). R&R visitors tend to have much higher satisfaction levels across various CBR attributes and they have the highest Net Promotor Score (78) of any of the seven persona segments.
- **Footloose Escapists** primarily travel to escape the demands and stresses of daily life or to enjoy nature, ecology, and wildlife. There were a total of 1.2 million Footloose Escapist that traveled to the CBR in 2021. Footloose Escapists are more likely than most other visitors to take water-based Storyteller Tours including Paddling Tours, Watermen's Life Tours and Sailing Tours. They may be one of the toughest segments to reach as they are the least likely to seek out multiple information sources and primarily rely on recommendations from friends, family and colleagues when planning a trip.
- **Familiarity & Value** travelers are looking for travel experiences that are affordable and familiar- they would much rather stay in budget accommodations than luxury hotels. Familiarity & Value travelers are most likely to respond to traditional marketing channels like TV and radio. This segment is the 2nd most likely to have children under age 18 at home (69%) and would be receptive to marketing around family-oriented activities. Their budget conscious nature makes them responsive to travel deals and discounts.

Additional Insight & Recommendations (continued)

- **Outdoor Enthusiasts** are significantly more likely than other visitors to travel to the region to fish, hunt, participate in water-based activities and escape the stresses of daily life. Not surprisingly their activities in the region include sightseeing, visiting a park, or participating in outdoor water-based activities, but they are also extremely likely to seek out culinary and dining opportunities. They are less likely than other segments to participate in storyteller tours and they tend to rely on internet searches and information from friends and family when trip planning. They are also significantly more likely to use the National Park Service's website when planning a trip.
- **Family First** travelers totaled 945,000 in 2021. While they spent less than average on their trip to the CBR on a per-visitor basis, they spent more than average in the region on a per-party basis. Lower than average trip spend is driven by the higher incidence of children as well as a higher incidence of VFR travel. Marketing the Chesapeake Bay Region as a place to connect with friends and family and build family traditions will be a compelling offer for these visitors. Outside of internet searches and recommendations from family and friends, travel guides/brochures, social media postings and trip review sites are the primary information sources for Family First visitors when planning a trip.



VISITATION TO MARYLAND'S CHESAPEAKE BAY REGION

APPENDIX TABLES

Appendix Table I: Point of Interest Visitor Volume

Point of Interest	Visitor Volume	Point of Interest	Visitor Volume	Point of Interest	Visitor Volume	Point of Interest	Visitor Volume	Point of Interest	Visitor Volume
American Chestnut Land Trust - South Side	2,866	Dogwood Harbor at Tilghman Island	7,682	Havre de Grace Maritime Museum	5,579	Newtowne Neck State Park	8,105	Snow Hill Park and Beach	2,713
Anita Leight Park and Estuary Center	5,485	Dorchester County Visitor Center	3,829	Helen Avalynne Tawes Garden	1,116	North Point State Park	37,035	Solomons Visitor Information Center	8,974
Annapolis and Anne Arundel County Visitor Information Center	8,281	Downs Park	38,198	Historic Elk Landing	282	Otter Point Creek National Estuarine Research Reserve	2,408	Sotterley Plantation	3,359
Annapolis City Dock	227,118	Eastern Neck National Wildlife Refuge	7,811	Historic Hancock's Resolution	2,056	Parkers Creek Watershed Nature Preserve	50,860	St Clement's Island Museum	2,443
Annapolis Maritime Museum	6,249	Elk Neck State Park	44,247	Historic London Town and Gardens	3,359	Patuxent River Naval Air Museum	10,841	St Clements Island State Park	2,255
Armel-Leftwich Visitor Center	14,400	Elms Beach Park	5,474	Historic St Mary's City	4,158	Pemberton Historical Park	18,723	St Mary's River State Park	9,491
Battle Creek Cypress Swamp	2,878	Emperor's Landing Park	1,527	J Millard Tawes Historical Museum and Ward Brothers Workshop	1,774	Perryville Community Park	14,318	Sue Creek Park	834
Bayside History Museum	341	Federal Hill Park	35,978	Jack Creek Park	670	Phillips Wharf Environmental Center	1,269	Sultana Education Foundation	470
Betterton Beach	10,912	Flag Ponds Nature Park	9,737	Janes Island State Park	22,435	Pickering Creek Audubon Center	893	Susquehanna Museum of Havre de Grace	1,503
Beverly Triton Nature Park	19,757	Flying Point Park	6,519	Jefferson Patterson Park and Museum	13,132	Piney Point Lighthouse Museum and Historic Park	834	Susquehanna State Park	38,984
Bill Burton Fishing Pier State Park	1,821	Fort Howard Park	8,516	Jug Bay Wetlands Sanctuary	3,559	Pocomoke River State Forest	30,563	Terrapin Beach Park	28,589
Blackwater National Wildlife Refuge	8,668	Fort McHenry National Monument and Historic Shrine	47,254	Kent Narrows Public Boat Ramp	10,395	Pocomoke River State Park	41,357	Thomas Point Park	3,442
Bohemia River State Park	26,628	Fort Smallwood Park	17,325	King's Landing Park	4,769	Pocomoke Sound Wildlife Management Area	540	Tome Visitor Center and Turtle Habitat	2,020
Breezy Point Beach and Campground	16,327	Frank J Hutchins Memorial Park	9,596	Lightship Chesapeake & Seven Foot Knoll Lighthouse	11,464	Point Lookout State Park	42,837	Tudor Hall	2,502
Calvert Cliffs State Park	30,340	Franklin Point State Park	364	Long Wharf Park	9,596	Pride of Baltimore II	1,680	Turkey Point Park	1,327
Calvert Marine Museum	12,415	Galesville Heritage Museum	59	Marshy Point Nature Center	7,470	Quiet Waters Park	39,807	Turner's Creek Park & Sassafras Natural Resource Management Area	4,616
Captain Avery Museum	164	Glenn Martin National Wildlife Refuge	3,395	Marshy Point Park	8,398	Richardson Maritime Museum	5,133	USS Constellation Museum	15,411
Chesapeake Bay Environmental Center	4,475	Greenwell State Park	23,257	Matapeake Fishing Pier and Matapeake Beach	15,622	Robinson Neck Preserve	23,915	Ward Museum of Wildfowl Art	4,722
Chesapeake Bay Maritime Museum	38,010	Gunpowder Falls State Park	25,207	Mayo Beach Park	3,395	Rocky Point Beach and Park	10,724	White Crystal Beach	2,114
Chesapeake Beach Railway Museum	3,171	Hallowing Point Park	34,615	Miami Beach Park and Bowleys Marina	4,158	Romancoke Fishing Pier	7,165	William Paca House & Garden	10,419
Chesapeake Heritage & Visitor Center	5,239	Handsell Historic Site	399	Millard Tydings Memorial Park	21,589	Sailwinds Park	21,307	Wye Grist Mill	1,503
Concord Point Lighthouse	3,348	Harriet Tubman Museum and Educational Center	1,950	Mount Harmon Plantation	2,009	Sandy Point State Park	115,274	Wye Island Natural Resource Management Area	11,487
Deale Island Wildlife Management Area	6,824	Harriet Tubman Underground Railroad National Historic Park and State Park	10,583	Museum of Historic Annapolis	3,712	Skipjack Martha Lewis	4,557	Wye Oak State Park	822
Delmarva Discovery Museum	4,193	Hart-Miller Island State Park	3,406	Myrtle Point Park	10,454	Smith Island Center	1,069		
Discovery Village	1,609	Havre de Grace Decoy Museum	2,185	Nathan of Dorchester	52,974	Smithsonian Environmental Research Center	2,103		

Appendix Table II: 2021 Visitation to CBR Gateways & Watertrails Network Sites

Point of Interest by County	Visitor Volume	Point of Interest	Visitor Volume	Point of Interest	Visitor Volume	Point of Interest	Visitor Volume	Point of Interest	Visitor Volume
Anne Arundel		Baltimore County		Dorchester		Queen Anne's		Talbot	
Annapolis City Dock	227,118	North Point State Park	37,035	Nathan of Dorchester	52,974	Terrapin Beach Park	28,589	Chesapeake Bay Maritime Museum	38,010
Sandy Point State Park	115,274	Gunpowder Falls State Park ¹	25,207	Robinson Neck Preserve	23,915	Wye Island Natural Resource Management Area	11,487	Dogwood Harbor at Tilghman Island	7,682
Quiet Waters Park	39,807	Rocky Point Beach and Park	10,724	Harriet Tubman Underground Railroad National Historic Park and State Park	10,583	Chesapeake Heritage & Visitor Center	5,239	Bill Burton Fishing Pier State Park	1,821
Fort Smallwood Park	17,325	Fort Howard Park	8,516	Blackwater National Wildlife Refuge	8,668	Chesapeake Bay Environmental Center	4,475	Wye Grist Mill	1,503
Armel-Leftwich Visitor Center	14,400	Marshy Point Park	8,398	Richardson Maritime Museum	5,133	Somerset		Phillips Wharf Environmental Center	1,269
William Paca House & Garden	10,419	Hart-Miller Island State Park	3,406	Dorchester County Visitor Center	3,829	Janes Island State Park	22,435	Pickering Creek Audubon Center	893
Annapolis and Anne Arundel County Visitor Information Center	8,281	Calvert		Harriet Tubman Museum and Educational Center	1,950	J Millard Tawes Historical Museum and Ward Brothers Workshop	1,774	Wye Oak State Park	822
Annapolis Maritime Museum	6,249	Parkers Creek Watershed Nature Preserve	50,860	Emperor's Landing Park	1,527	Smith Island Center	1,069	Wicomico	
Museum of Historic Annapolis	3,712	Calvert Cliffs State Park	30,340	Handsell Historic Site	399	St. Mary's County		Pemberton Historical Park	18,723
Jug Bay Wetlands Sanctuary	3,559	Jefferson Patterson Park and Museum	13,132	Harford		Point Lookout State Park	42,837	Ward Museum of Wildfowl Art	4,722
Historic London Town and Gardens	3,359	Calvert Marine Museum	12,415	Susquehanna State Park		Greenwell State Park	23,257	Worcester	
Smithsonian Environmental Research Center	2,103	Flag Ponds Nature Park	9,737	Gunpowder Falls State Park ¹		Patuxent River Naval Air Museum	10,841	Pocomoke River State Park	41,357
Historic Hancock's Resolution	2,056	Solomons Visitor Information Center	8,974	Havre de Grace Maritime Museum		Myrtle Point Park	10,454	Pocomoke River State Forest	30,563
Helen Avalynne Tawes Garden	1,116	King's Landing Park	4,769	Anita Leight Park and Estuary Center		St Mary's River State Park	9,491	Delmarva Discovery Museum	4,193
Franklin Point State Park	364	Chesapeake Beach Railway Museum	3,171	Skipjack Martha Lewis		Newtowne Neck State Park	8,105		
Captain Avery Museum	164	Battle Creek Cypress Swamp	2,878	Concord Point Lighthouse		Historic St Mary's City	4,158		
Galesville Heritage Museum	59	Bayside History Museum	341	Havre de Grace Decoy Museum		Sotterley Plantation	3,359		
Baltimore City		Cecil		Susquehanna Museum of Havre de Grace		Tudor Hall	2,502		
Fort McHenry National Monument and Historic Shrine	47,254	Elk Neck State Park	44,247	Kent		St Clement's Island Museum	2,443		
Federal Hill Park	35,978	Tome Visitor Center and Turtle Habitat	2,020	Eastern Neck National Wildlife Refuge		St Clements Island State Park	2,255	¹ Gunpowder Falls State Park is in both Baltimore County and Harford County	
USS Constellation Museum	15,411	Mount Harmon Plantation	2,009	Turner's Creek Park & Sassafras Natural Resource Management Area		Piney Point Lighthouse Museum and Historic Park	834		
Lightship Chesapeake & Seven Foot Knoll Lighthouse	11,464	Historic Elk Landing	282	Sultana Education Foundation					
Pride of Baltimore II	1,680								

Appendix Table III: Town Visitor Volume For Top 50 DMAs of Origin (1 – 25)

Destination=> Origin ▾	Annapolis	Baltimore	Cambridge	Chesapeake Beach	Chesapeake City	Chestertown	Crisfield	Easton	Galesville	Havre de Grace	Kent Narrows	Leonardtown	North East	Pocomoke City	Rock Hall	Salisbury	Solomons	St. Mary's City	St. Michaels
Washington, DC (Hagerstown, MD)	545,503	489,390	63,525	99,047	13,837	23,976	32,891	77,045	122,868	118,138	153,863	183,969	37,728	9,324	13,019	99,697	122,436	137,420	102,233
Salisbury, MD	73,429	53,219	54,450	7,491	28,252	15,432	30,266	74,683	13,053	25,328	47,500	10,518	12,576	9,771	6,026	425,550	7,727	7,639	41,982
Philadelphia, PA	149,480	198,070	28,773	11,024	605,495	59,866	13,834	41,879	11,138	168,867	82,083	11,576	168,385	8,887	75,081	75,945	15,044	9,785	68,331
Baltimore, MD	99,236	64,165	72,030	26,825	36,738	11,664	41,220	68,765	29,412	92,537	41,210	61,441	37,948	13,554	3,942	127,950	54,141	108,322	56,105
New York, NY	109,194	161,311	12,010	6,190	18,851	7,683	5,985	8,709	8,180	59,827	19,880	9,909	41,626	4,586	7,523	25,165	7,157	5,150	21,079
Harrisburg-Lancaster-Lebanon-York, PA	53,961	161,154	7,045	5,738	33,797	6,360	4,291	9,753	13,227	85,801	19,751	4,265	35,541	2,360	12,280	13,556	7,851	10,043	12,928
Norfolk-Portsmouth-Newport News, VA	40,070	37,417	7,775	5,964	4,484	2,629	23,603	7,786	3,481	7,457	7,118	19,978	4,373	84,873	1,004	73,648	11,199	7,897	8,959
Richmond-Petersburg, VA	33,046	42,604	2,950	5,597	1,928	3,055	2,513	3,528	10,268	10,066	8,672	11,159	7,118	2,583	360	7,171	8,955	5,408	5,867
Pittsburgh, PA	27,763	28,986	2,679	4,127	2,411	1,481	1,016	3,678	6,439	6,885	8,723	5,900	5,373	498	777	4,182	4,843	1,803	4,427
Atlanta, GA	29,192	30,072	1,657	3,194	1,495	648	565	1,584	3,481	5,443	2,407	3,592	8,305	446	341	3,101	2,261	1,288	3,056
Orlando-Daytona Beach-Melbourne, FL	28,292	21,442	1,562	5,851	4,869	1,083	875	2,634	9,572	8,799	7,843	10,101	9,000	731	1,004	4,486	7,709	2,661	1,897
Raleigh-Durham (Fayetteville), NC	23,850	25,225	1,862	2,855	1,061	713	762	2,350	1,566	5,518	3,443	7,985	6,051	1,092	379	5,524	4,700	1,717	2,213
Tampa-St. Petersburg (Sarasota), FL	31,070	18,117	1,884	5,540	8,148	1,601	1,101	2,582	5,569	10,464	6,238	4,008	8,000	513	1,061	4,991	6,124	1,288	3,548
Wilkes Barre-Scranton, PA	10,017	25,844	1,687	2,685	3,471	1,185	1,920	2,292	3,829	7,208	2,692	2,277	6,237	812	1,213	4,579	2,777	773	2,811
Boston, MA (Manchester, NH)	22,070	23,486	1,416	1,329	2,266	1,231	2,089	1,706	2,611	7,382	2,537	1,379	5,051	945	682	2,891	2,225	2,661	3,338
Chicago, IL	17,628	25,416	1,540	509	964	574	311	1,242	1,740	2,784	1,941	2,277	8,508	266	284	1,754	1,317	1,030	1,476
Charlotte, NC	19,565	18,236	1,146	2,233	868	389	395	1,561	2,088	2,983	2,692	3,046	5,339	1,021	644	3,443	3,863	1,459	1,686
Miami-Fort Lauderdale, FL	21,796	16,768	949	905	2,603	315	254	1,276	8,354	4,698	3,339	994	6,102	166	341	1,820	2,403	258	4,181
Roanoke-Lynchburg, VA	13,931	14,796	978	1,385	868	407	649	2,066	2,436	5,468	3,960	6,157	3,525	646	398	2,998	2,368	2,232	2,178
Dallas-Ft. Worth, TX	18,118	14,271	978	1,668	723	361	423	1,131	696	2,411	1,864	2,437	6,508	161	417	1,562	2,813	773	1,194
Johnstown-Altoona, PA	8,491	12,519	1,044	1,215	1,398	583	423	1,410	696	2,560	1,916	2,405	2,169	546	587	2,077	2,083	2,403	1,265
Hartford & New Haven, CT	8,198	11,976	606	1,639	1,687	491	367	679	870	3,132	1,734	1,219	4,780	532	303	2,105	1,389	773	1,124
Cleveland-Akron (Canton), OH	12,189	12,150	599	1,131	482	268	565	1,033	1,392	2,784	2,407	513	3,847	237	95	1,459	1,513	515	1,054
West Palm Beach-Ft Pierce, FL	21,855	8,253	423	1,555	1,784	370	1,101	1,480	10,964	2,237	2,744	2,213	2,610	399	341	1,600	3,650	86	3,829
Houston, TX	12,854	12,290	621	876	482	157	339	899	522	1,790	1,475	1,667	3,763	133	95	1,113	944	172	1,019



Appendix Table III (Continued): Town Visitor Volume For Top 50 DMAs of Origin (25 – 50)

Destination→ Origin ∇	Annapolis	Baltimore	Cambridge	Chesapeake Beach	Chesapeake City	Chestertown	Crisfield	Easton	Galesville	Havre de Grace	Kent Narrows	Leonardtown	North East	Pocomoke City	Rock Hall	Salisbury	Solomons	St. Mary's City	St. Michaels
Nashville, TN	8,844	10,823	832	1,329	241	231	339	1,010	1,914	2,759	1,217	2,405	4,102	427	265	2,110	1,264	1,288	1,581
Jacksonville, FL	12,131	8,439	1,351	707	916	574	903	1,004	3,655	3,082	1,605	6,478	3,847	256	265	1,768	4,878	944	1,230
Greensboro-High Point-Winston Salem, NC	8,491	9,546	1,029	1,131	289	509	819	923	870	3,753	1,165	1,219	3,915	313	152	1,590	1,050	1,030	808
Myrtle Beach-Florence, SC	7,298	7,625	701	4,240	1,061	213	791	1,427	3,481	3,306	1,941	5,099	3,169	498	625	1,618	2,421	601	1,370
Detroit, MI	9,313	10,399	511	1,244	1,061	28	141	487	696	1,292	880	705	1,627	185	76	1,558	926	944	808
Ft. Myers-Naples, FL	10,644	4,779	876	876	2,266	1,166	2,033	1,102	4,351	3,902	4,116	3,367	2,339	432	1,251	2,227	3,187	1,459	2,143
Columbus, OH	7,670	9,597	569	537	337	324	226	812	348	2,237	1,967	1,122	3,424	109	246	1,221	819	1,030	773
Los Angeles, CA	12,502	9,673	358	1,187	289	435	56	574	696	1,889	1,475	1,154	1,593	71	208	739	659	429	1,335
Denver, CO	12,013	8,753	321	791	868	426	169	714	4,177	1,740	1,631	802	2,424	119	644	781	1,211	1,288	1,967
Greenville-New Bern-Washington, NC	10,741	5,496	986	1,159	868	324	536	1,021	2,785	2,287	2,692	4,810	1,949	527	436	1,918	2,314	1,545	878
Greenville-Spartanburg, SC-Asheville, NC-Anderson, SC	9,098	7,451	898	1,272	289	389	903	975	696	1,740	2,019	1,603	3,322	195	95	739	1,923	172	1,230
Indianapolis, IN	7,357	7,829	511	650	241	324	508	528	1,044	1,466	1,087	609	2,797	47	133	1,109	712	258	527
Cincinnati, OH	7,376	7,010	380	876	627	231	649	522	174	1,665	958	1,219	1,983	366	152	875	659	0	422
Minneapolis-St. Paul, MN	8,902	7,536	124	452	241	102	56	429	1,044	1,417	673	1,443	1,695	109	95	575	890	258	527
Phoenix, AZ	7,670	6,425	504	594	771	259	141	650	696	2,709	1,139	2,277	2,203	114	246	631	1,068	515	984
Harrisonburg, VA	4,422	6,531	650	763	579	176	113	1,062	522	2,486	414	2,277	1,068	95	95	1,268	1,406	773	1,194
Charleston, SC	11,035	4,338	752	933	1,398	463	226	1,085	1,914	2,088	1,864	1,251	1,237	138	815	1,338	1,157	86	2,108
Columbia, SC	7,689	6,001	175	226	193	389	169	447	4,177	1,417	932	2,405	1,881	90	171	968	979	773	316
Knoxville, TN	5,361	5,178	599	1,357	579	74	339	656	696	1,292	725	2,694	3,288	176	190	795	1,941	773	632
Savannah, GA	8,002	5,013	314	565	1,350	398	141	598	2,611	1,690	1,605	1,764	2,576	280	76	716	1,139	515	457
St. Louis, MO	7,513	5,937	263	509	145	37	141	319	1,044	771	569	513	2,322	81	19	412	837	172	492
Providence, RI-New Bedford, MA	8,296	4,771	292	424	820	454	56	464	522	1,640	492	481	1,508	157	171	683	641	2,146	351
Wilmington, NC	7,924	3,821	504	594	627	176	85	992	1,914	1,616	1,501	2,790	746	119	208	753	1,371	258	1,862
Charleston-Huntington, WV	5,048	6,221	307	170	96	74	113	406	522	547	569	1,347	1,610	57	95	318	730	172	457
Buffalo, NY	3,404	5,899	292	763	241	74	508	325	0	795	828	994	1,186	66	133	791	445	172	738
Rest of DMAs	229,756	229,262	14,828	29,313	17,935	9,155	7,143	18,659	23,495	60,498	26,429	48,934	96,607	5,431	4,529	31,307	36,818	19,055	21,782
Total	1,869,298	1,931,532	299,117	259,234	813,288	159,529	185,067	358,940	338,495	760,649	498,528	470,746	594,882	155,541	139,588	957,173	358,940	350,202	404,752

About Rockport Analytics

Rockport Analytics is a research and analytical consulting firm providing high quality quantitative and qualitative research solutions to business, government, and non-profit organization clients across the globe. We provide fast, nimble service in a completely transparent environment.

Capabilities include:

- Market Analysis and Forecasting
- Economic Impact Assessment, Tourism Satellite Accounting, and Economic Development
- Market Modeling and Decision Support Tools
- Project Feasibility Assessment
- Primary and Secondary Research Synthesis
- Stakeholder Surveys – internal & external



Rockport Analytics, LLC

Annapolis, MD

West Chester, PA

rockportanalytics.com

info@rockportanalytics.com

(866) 481-9877