

# Maryland Office of Tourism Development & Marriner Marketing

## Ad Effectiveness & ROI Study (Post-Campaign)

Final Report of Findings  
October 2019

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

Destination  Analysts





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# Research Overview

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This report presents the findings of a study of American leisure travelers from key markets conducted by Destination Analysts on behalf of the Maryland Office of Tourism & Development and its agency, Marriner Marketing. This online survey-based research was conducted after the commencement of the Maryland Office of Tourism & Development's FY 2019 advertising campaign, with the primary objective of measuring the trips to Maryland (between the spring and summer season of 2019) motivated by the campaign and estimating the economic impact of this incremental travel to the state. In addition, the study benchmarked the following:

- Awareness of and familiarity with Maryland as a leisure travel destination
- Rates of past visitation and likelihood to visit the state in the future
- Current perceptions of the state as a leisure travel destination
- Visitation to Maryland and trip activities
- Aided and unaided recall of the campaign's advertising creative
- Earned media recall
- Effectiveness of advertising in motivating interest in visiting Maryland





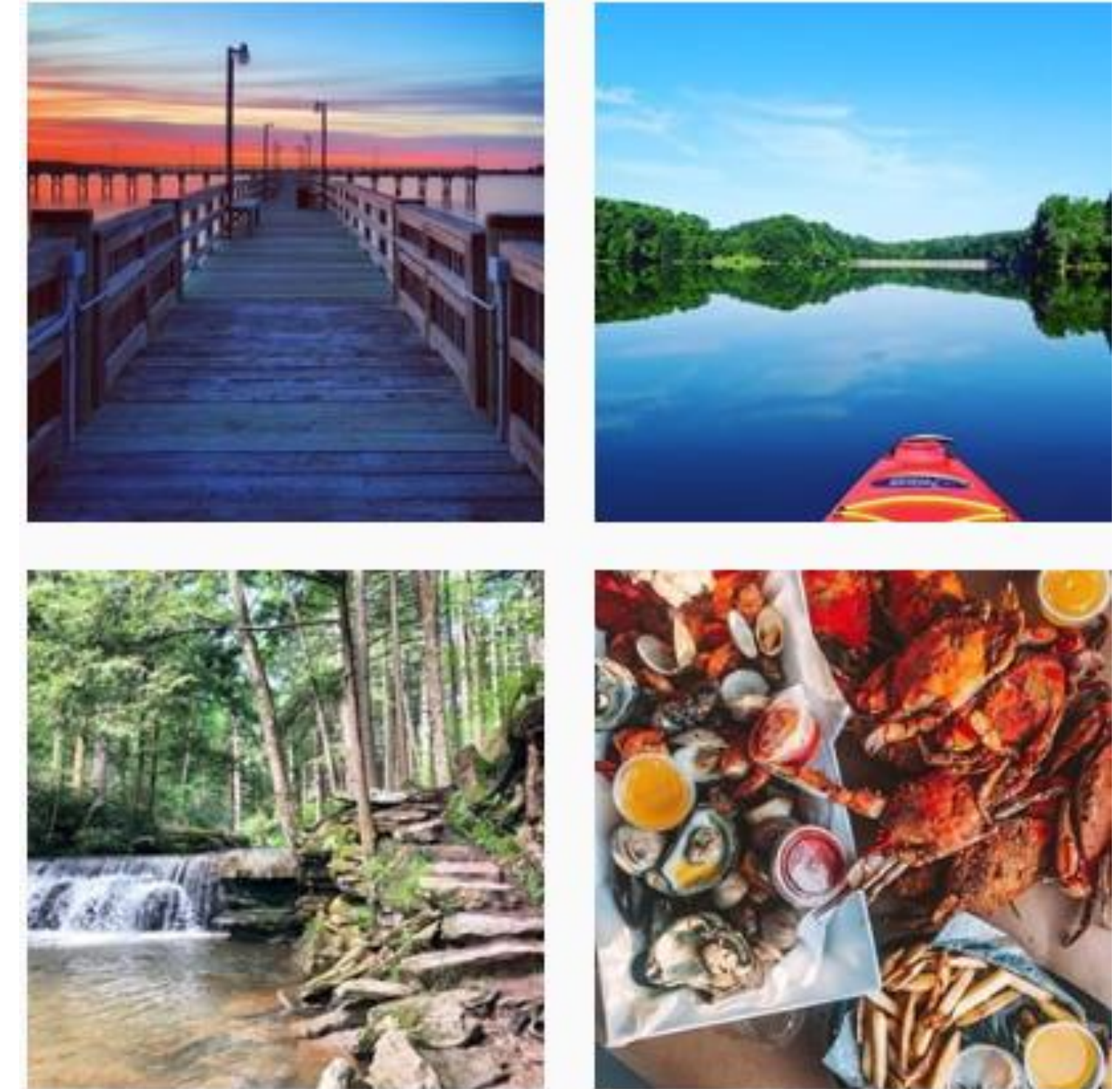
# Methodology

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Destination Analysts worked closely with Marriner Marketing to develop a questionnaire to address these informational goals as well other insights desired. Using the domestic panel of survey sample provider Dynata, an invitation to take this survey was sent to adult Americans from Maryland's key feeder markets (DMAs): Baltimore, Cincinnati, Cleveland, Columbus, District of Columbia, Harrisburg/Lancaster, New York, Philadelphia and Pittsburgh. Albany was also included in the sample as a control measure. Respondents were then screened for the following qualifications:

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

The survey was fielded October 23<sup>rd</sup> through October 30<sup>th</sup>, 2019. In total, 1,600 complete surveys were collected.



*Images courtesy of Instagram (@VisitMaryland)*



A scenic photograph of a red wooden covered bridge spanning a small stream. The bridge has a dark roof and a large arched opening. The surrounding area is lush with green grass and trees, many of which are in full bloom with pink blossoms. The scene is captured in a soft, slightly overcast light, creating a peaceful and picturesque atmosphere.

# CAMPAIGN ROI & ECONOMIC IMPACT ESTIMATES



# Summary of Key Findings: Campaign ROI & Economic Impact

Below are key statistics derived from this research. These economic impact estimates are based on incremental visitation to Maryland that occurred between the months of April and September 2019:

**16.8%**

Of all respondents recalled seeing one or more Maryland ads tested

**53,567**

Incremental Trips Generated

**\$45.4 Million**

In Direct Spending in Maryland Generated by incremental visitors

**\$6.2 Million**

In taxes generated for local government from the direct visitor spend

**123,204**

Incremental Visitors

**31:1 ROI**

For every dollar spent on this advertising, \$31 flowed back into the state's economy



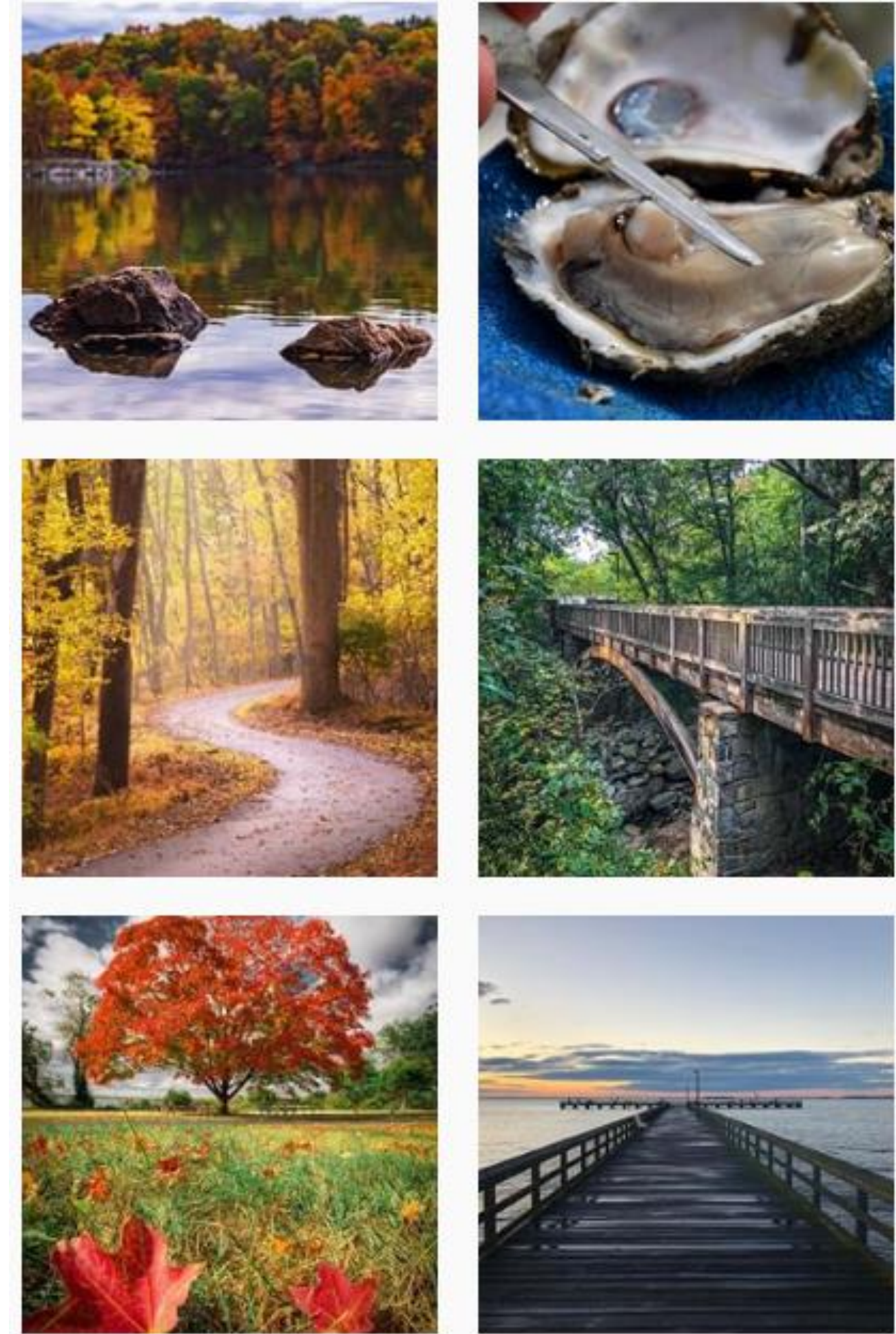
# Return on Investment Analysis

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This report presents the estimates of Maryland’s FY19 advertising campaign’s effectiveness in attracting visitors to the state—and thus generating economic impact—in the period from April to September 2019.

A key objective of this research was to estimate incremental visitation, consequent visitor spending and taxes generated by the advertising program. Incremental visitation is defined as travel to Maryland that is a direct result of the advertising campaigns or, alternatively, it is visitation that would not have occurred in the absence of the advertising campaign. Spending on such incremental trips generated income for local businesses and tax revenues for the local government, which are key indicators of the success of the advertising.

The technique used in this study to estimate incremental visitation and spending relies on data collected from a sample of leisure travelers in key markets advertised in. Statistics collected in this survey were used in Destination Analysts’ proprietary economic impact model for destinations. This economic model was designed for this purpose and uses both survey and other secondary data sources.



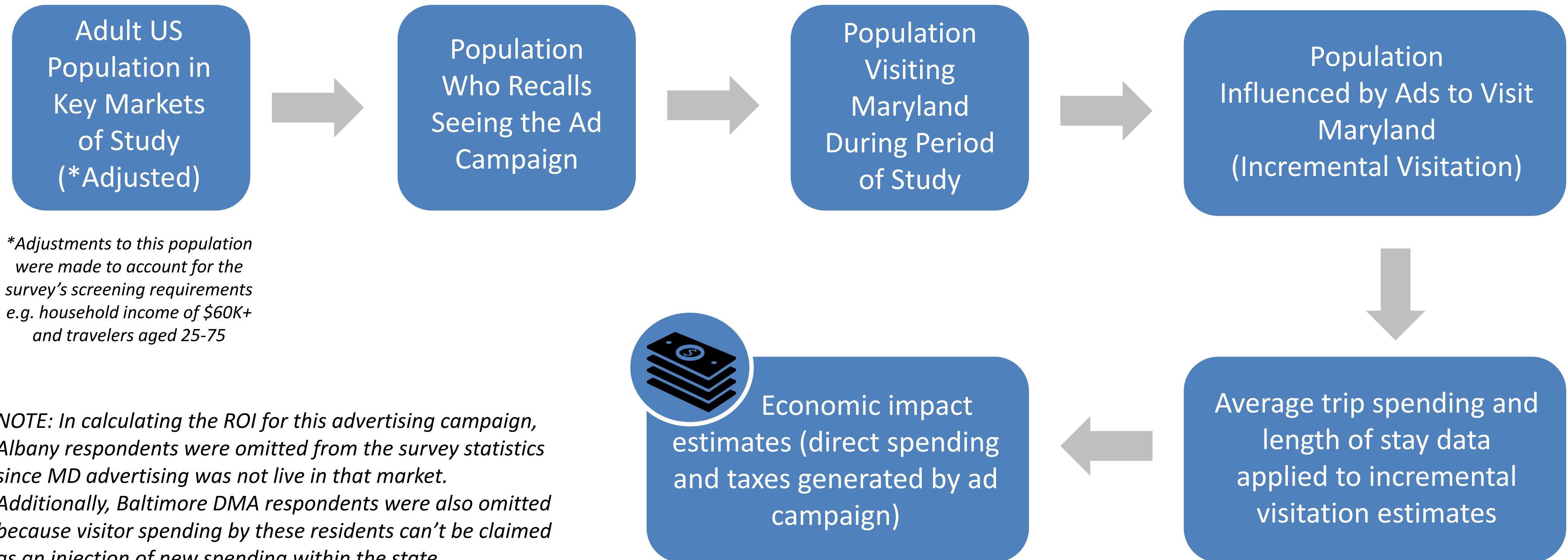
*Images courtesy of Instagram (@VisitMaryland)*



# Return on Investment Analysis (continued)

## Calculation of Incremental Visitation

The simplified flow chart below shows the steps used in the ROI calculation.





# Return on Investment Analysis (continued)

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The model applies survey data to other secondary data sources to estimate the direct visitor spending (and consequent state taxes) generated by the campaign. The first step in calculating the advertising campaign's economic impact is developing estimates of the adjusted adult population in the key markets we studied. This step is taken to eliminate the over-estimation common in tourism economic impact studies. In this process, data from the survey—along with US Census population data—estimates of Maryland's actual visitor volume and survey data on the sample population's visitation to Maryland are used. In the end, the model estimates the adult population against which the survey's statistics are applied in the calculation steps that follow.

In the steps that follow, this adjusted population base is reduced (using survey data on the proportion of respondents who recall seeing the ads and report that they had a significant influence on their decision to visit Maryland) to form estimates of the number of incremental trips taken as a result of the advertising campaign. From this point, the calculation of incremental spending is straightforward. The number of incremental trips generated by the campaign is multiplied by average daily trip spending and the average length of stay (days) in Maryland. This result is the estimated incremental visitor spending generated by the campaign.

To calculate taxes generated for Maryland by the visitor spending created by the campaign, we use ratios developed by the State of Maryland in its visitor study.





# Return on Investment Analysis (continued)

## Evaluating the Campaign's Reach

**Maryland's 2019 advertising campaign's reach was moderate.** In total, 16.8 percent of all travelers from key markets surveyed recalled at least one of the campaign's advertisements tested. The table below shows overall ad recall rates amongst survey respondents segmented by market and recent visitation to Maryland. Outside of Baltimore and Washington, DC the highest recall rates observed were amongst travelers who reside in the Pittsburgh (17.5%) and New York (17.0%) DMAs. Additionally, travelers who visited Maryland within the last 6 months were much more likely to have recalled the advertising creative tested (26.8% vs. 10.5% for those who did not visit the state in that time period).

### Aided Advertising Recall Rates

	Total	*Albany (Control Market)	*Baltimore	Cincinnati	Cleveland	Columbus	Harrisburg	Philadelphia	Pittsburgh	New York	Washington, DC	Visited MD in the past 6 months	Did not visit MD in the past 6 months
<b>Non-Ad Exposed</b>	83.2%	85.1%	71.6%	83.7%	95.1%	91.3%	86.3%	84.5%	82.5%	83.0%	77.4%	73.2%	89.5%
<b>Ad- Exposed</b>	16.8%	14.9%	28.4%	16.3%	4.9%	8.7%	13.7%	15.5%	17.5%	17.0%	22.6%	26.8%	10.5%
<b>Base</b>	1600	101	102	98	103	103	102	297	103	294	297	624	973

*\*Please note Albany & Baltimore were excluded from the ROI Analysis*



# Return on Investment Analysis (continued)

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## ROI

**In total, the advertising campaign generated 53,567 incremental trips to Maryland.** Incremental trips are those directly generated by the advertisements, ones that would not have occurred had the advertising not been consumed. The typical incremental visitor spent a total of \$848.11 in-market during their trip. Thus, the overall amount of direct visitor spending generated by the campaign totals \$45.4 million. **Given the media investment of \$1,458,678, the estimated campaign ROI is 31:1.** In other words, for every dollar spent by the Maryland Office of Tourism Development on this advertising, \$31 flowed back into the state's economy. Note: *No multipliers are used in this analysis.*

Direct visitor spending and associated tax revenue was spread across sectors. The table at right shows the estimated direct visitor spending by category generated by the campaign.

**The amount of taxes generated for the local government from the direct visitor spending created by the campaign is estimated to be \$6,166,330.** This implies an overall tax ROI of 4.2:1. That is, for every dollar spent on running this advertising, state and local governments received \$4.23 back in tax revenue.

**Direct Visitor Spending Generated by the Advertising Campaign—By Sector**

	<b>Direct Visitor Spending in Maryland</b>
Lodging (e.g. hotel, motel, home-share rental, vacation rental, etc.)	\$15,937,360
Restaurants & dining	\$11,357,156
Retail purchases	\$6,145,747
Recreation, entertainment, tours & sightseeing	\$5,049,983
Gas, parking & local transportation	\$3,419,086
Car rental (if rented in Maryland)	\$1,736,211
Other	\$1,785,662
<b>Total Spending Generated by Campaign</b>	<b>\$45,431,205</b>





# SEGMENT SUMMARIES BY RECENT VISITATION TO MARYLAND



# KEY FINDINGS: RECENT VISITORS

(Those who took a leisure trip to MD in the past 6 months, lives in the markets of study, has HHI of \$60K+, aged 25-72 and has taken an overnight leisure trip with at least a 1-night stay in paid accommodations in past 12 months)

## Demographics

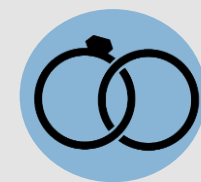
(Base: All recent visitors)



Female – **53.1%**  
Male – **46.5%**



Mean Age – **50.1**  
Boomers (40.3%), Gen X (31.3%), Millennials (28.4%)



Single – **20.8%**  
Married – **71.6%**  
Domestic partnership – **5.4%**



Has Children Under 18: **37.9%**



Caucasian/white – **76.3%**  
African-American/black – **11.1%**  
Asian – **7.9%**  
Hispanic/Latin American – **3.2%**



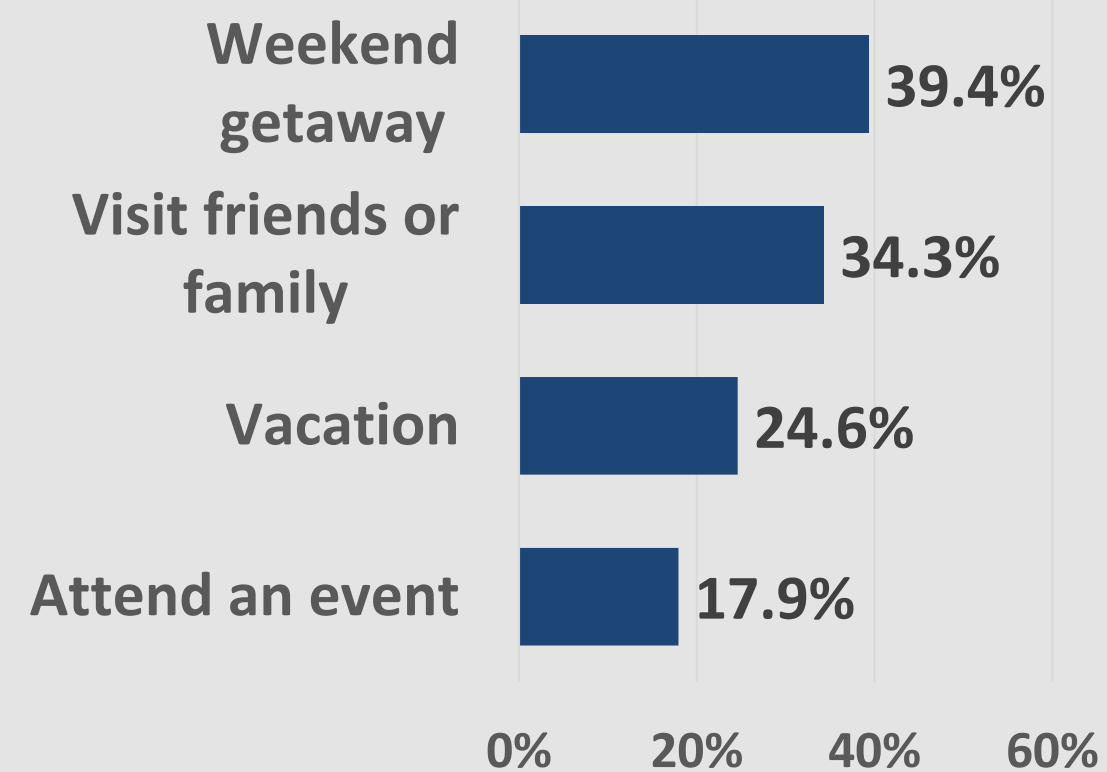
Heterosexual – **96.2%**  
LGBTQ – **3.2%**  
Other – **0.6%**



Mean Annual Household Income – **\$124,528**

## Top Reasons for Visiting

(Base: All recent visitors)



## Total In-Market Spending

(Base: All recent visitors)

**\$674**

Per travel party

**\$284**

Per person

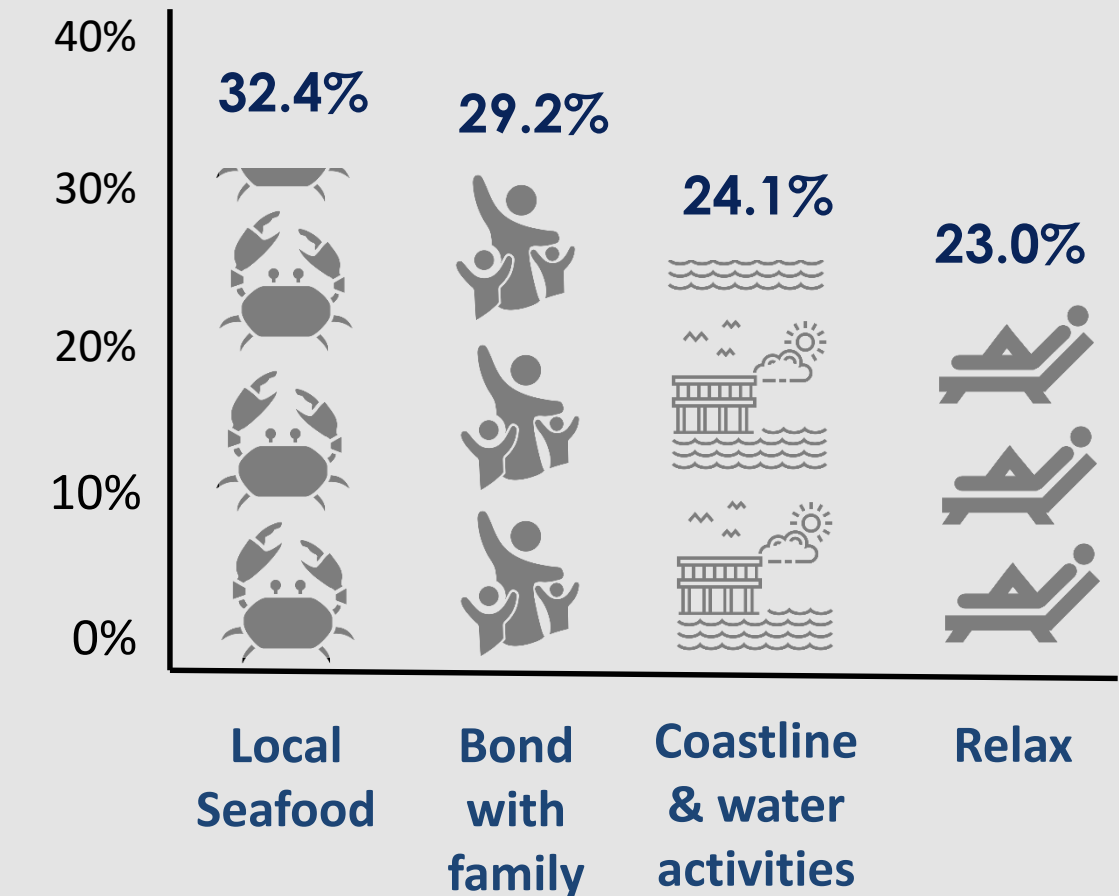
## Top Activities

(Base: All recent visitors)



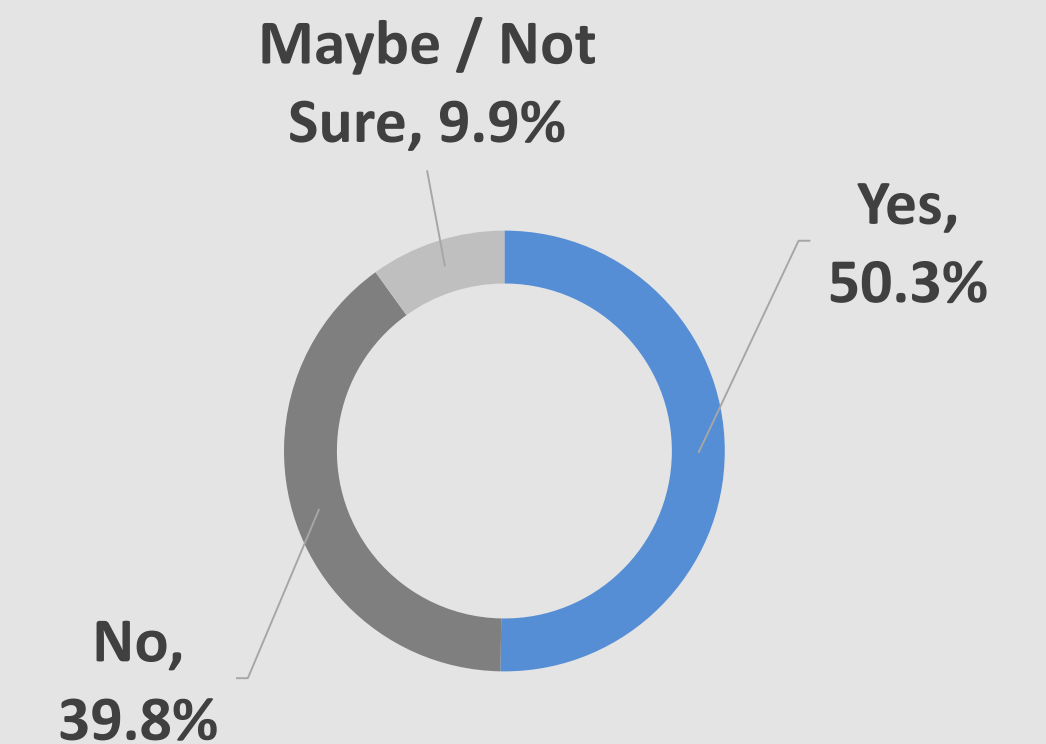
## Motivating Factors to Visit MD

(Base: All recent visitors)



## Ads' Influenced Decision to Visit

(Base: Recent visitors who recalled the tested ads)





# KEY FINDINGS: NON-VISITORS

(Those who did **not** take a leisure trip to MD in the past 6 months, lives in the markets of study, has HHI of \$60K+, aged 25-72 and has taken an overnight leisure trip with at least a 1-night stay in paid accommodations in past 12 months)

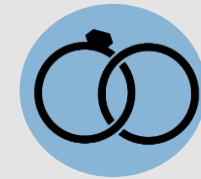
## Demographics



Female – **57.3%**  
Male – **42.6%**



Mean Age – **51.8**  
Boomers (45.1%), Gen X (30.4%),  
Millennials (24.4%)



Single – **24.0%**  
Married – **68.1%**  
Domestic partnership – **5.5%**



Has Children Under 18: **28.6%**



Caucasian/white – **83.8%**  
African-American/black – **5.2%**  
Asian – **5.7%**  
Hispanic/Latin American – **3.0%**

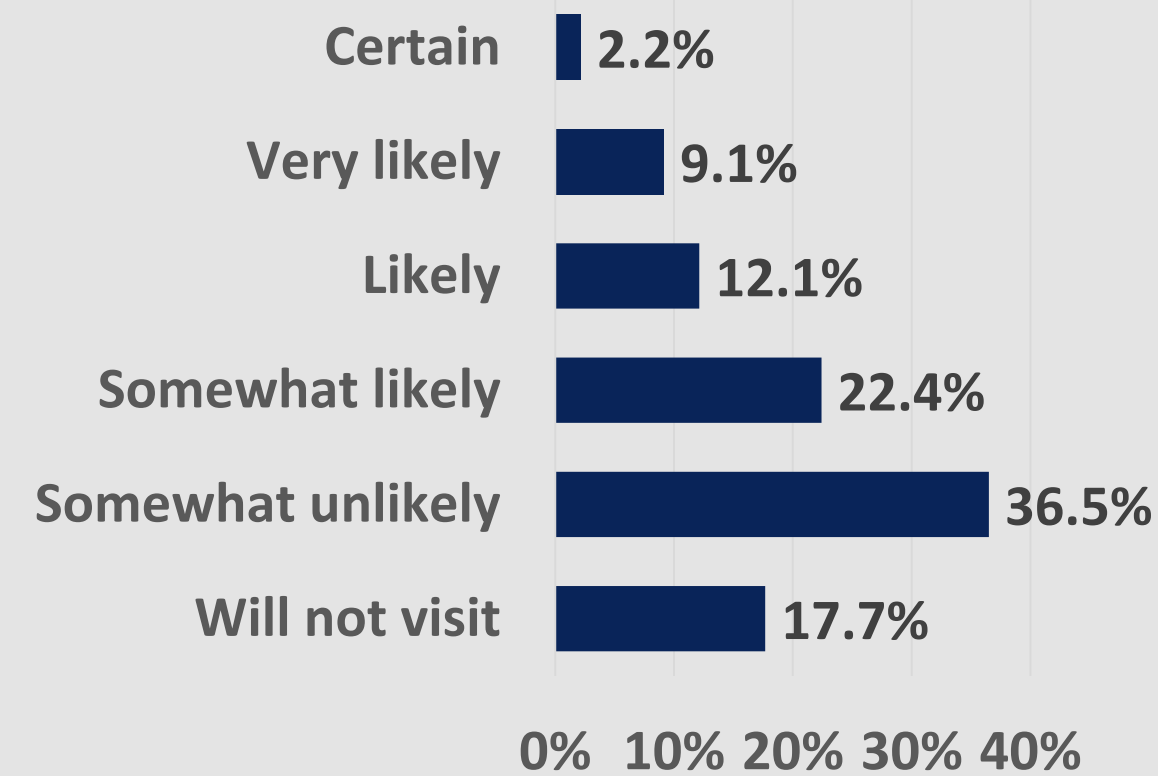


Heterosexual – **94.8%**  
LGBTQ – **4.7%**  
Other – **0.5%**

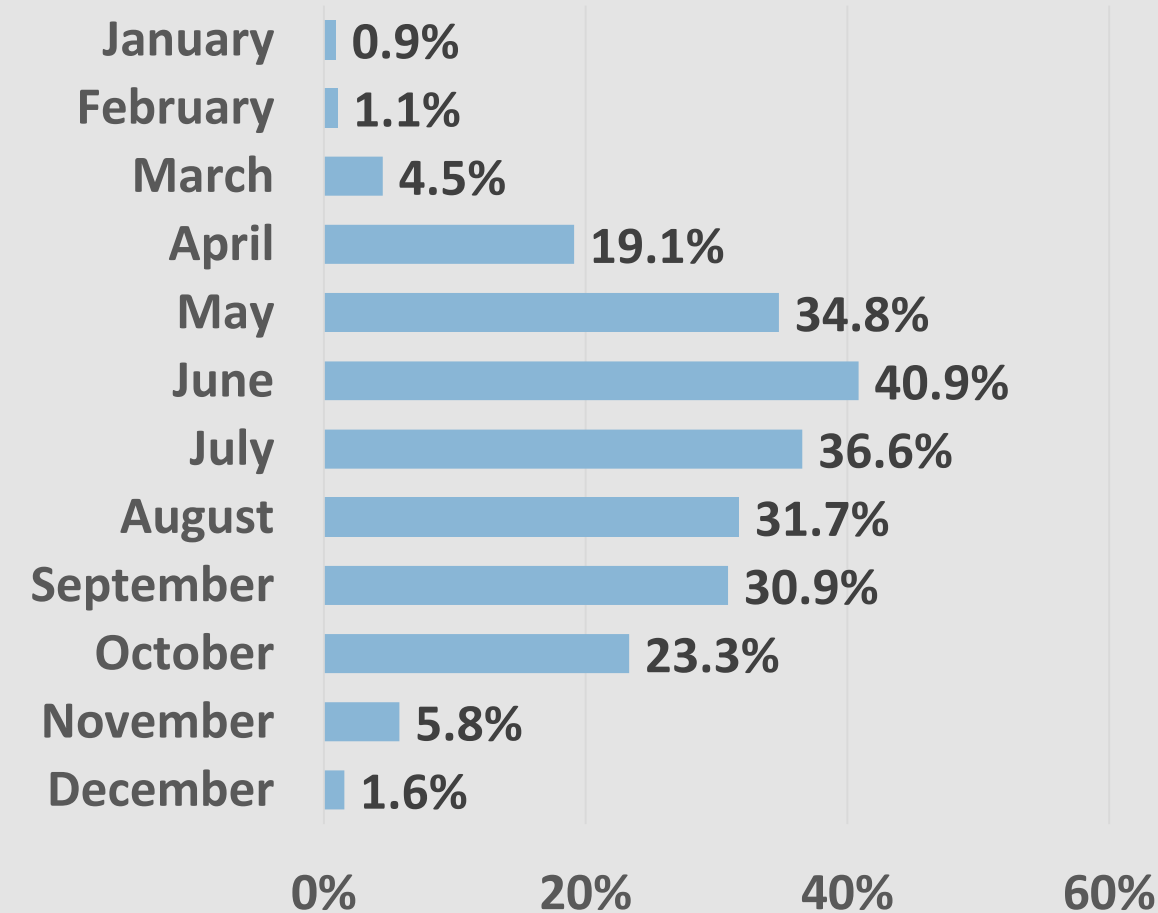


Mean Annual Household  
Income – **\$119,861**

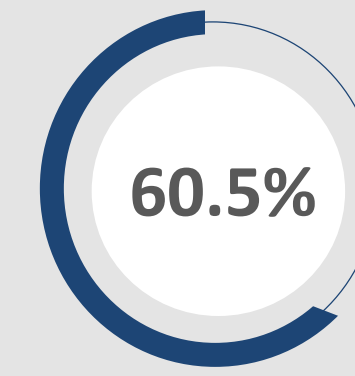
## Likelihood to Visit MD Next 12 Months



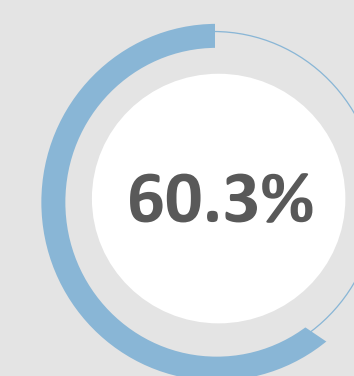
## Potential Months of Future Visit



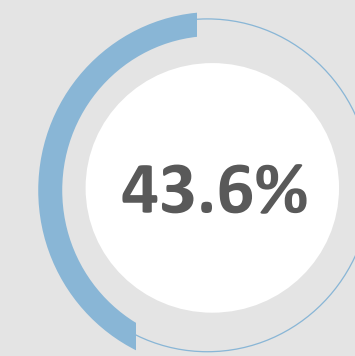
## Top MD Activities of Interest



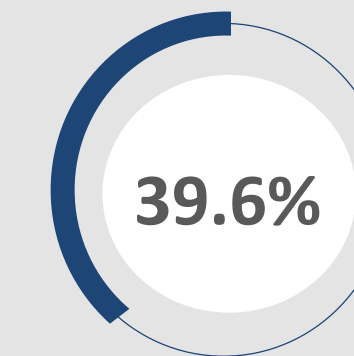
Visit the beach



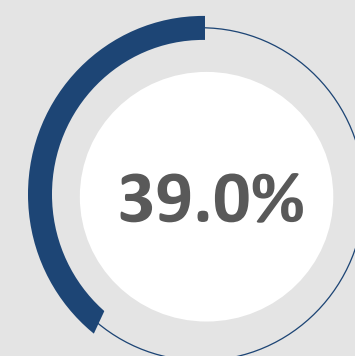
Enjoying local  
seafood



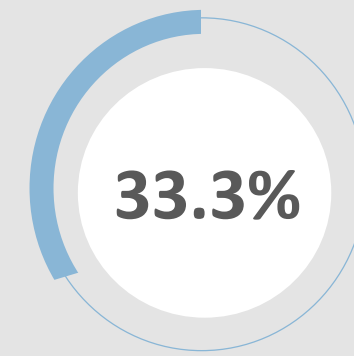
Enjoying the local  
culinary scene



Visit historical  
sites

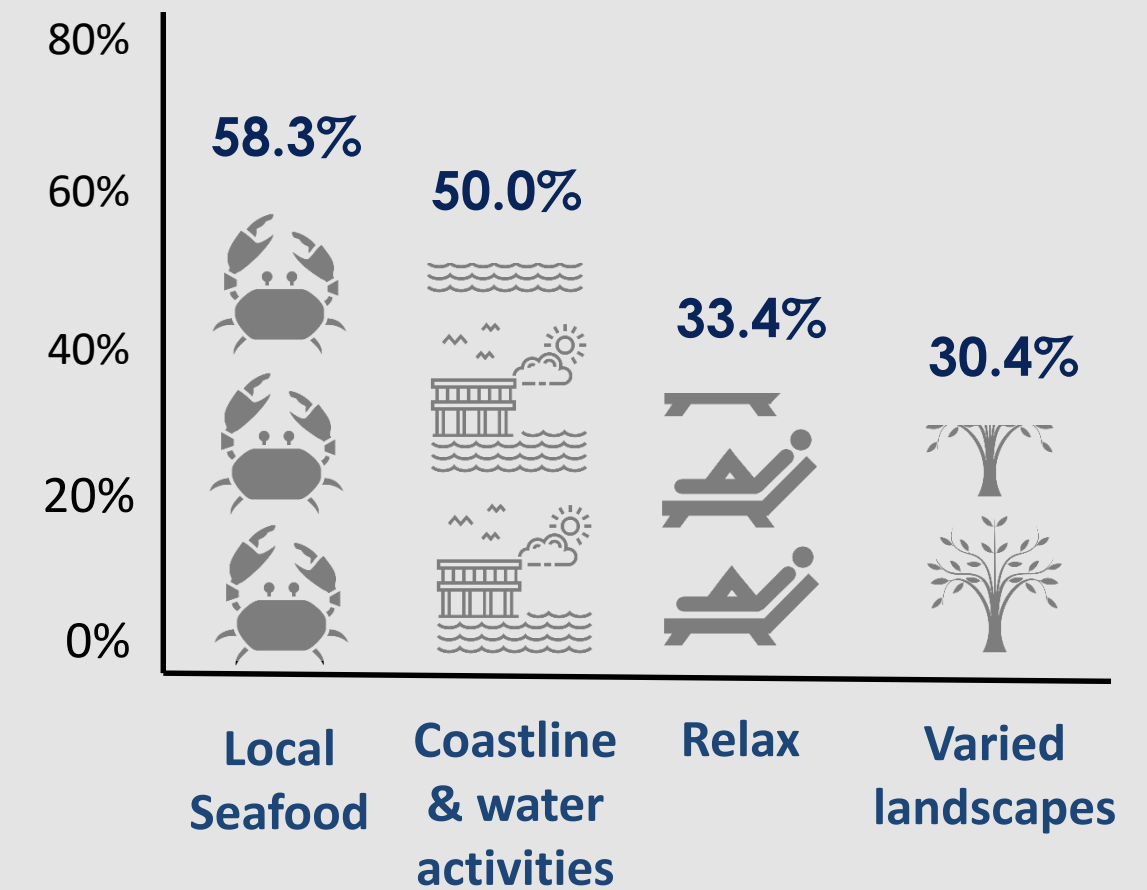


Sightseeing

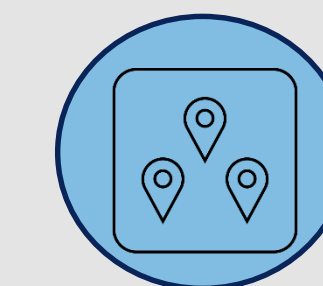


Local breweries,  
distilleries or  
wineries

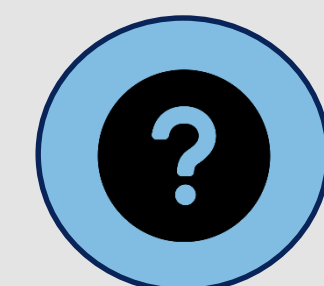
## Top Motivating Factors to Visit MD



## Deterrents to Visiting MD



Other  
Destinations  
are more  
appealing  
(**66.7%**)



I don't  
know  
enough  
about MD  
(**13.3%**)



Not  
enough  
personal  
vacation  
time  
(**6.7%**)



# AD-EXPOSED VS. NON-AD EXPOSED

THE FOLLOWING SUMMARIZES PERCEPTIONS OF THE MARYLAND DESTINATION BRAND AMONGST TRAVELERS WHO WERE EXPOSED TO THE STATE'S ADVERTISING (I.E. RECALLED ONE OR MORE OF THE ADS TESTED) AND AMONGST THOSE WHO WERE NOT EXPOSED (I.E. DID NOT RECALL SEEING ANY OF THE CREATIVE TESTED).

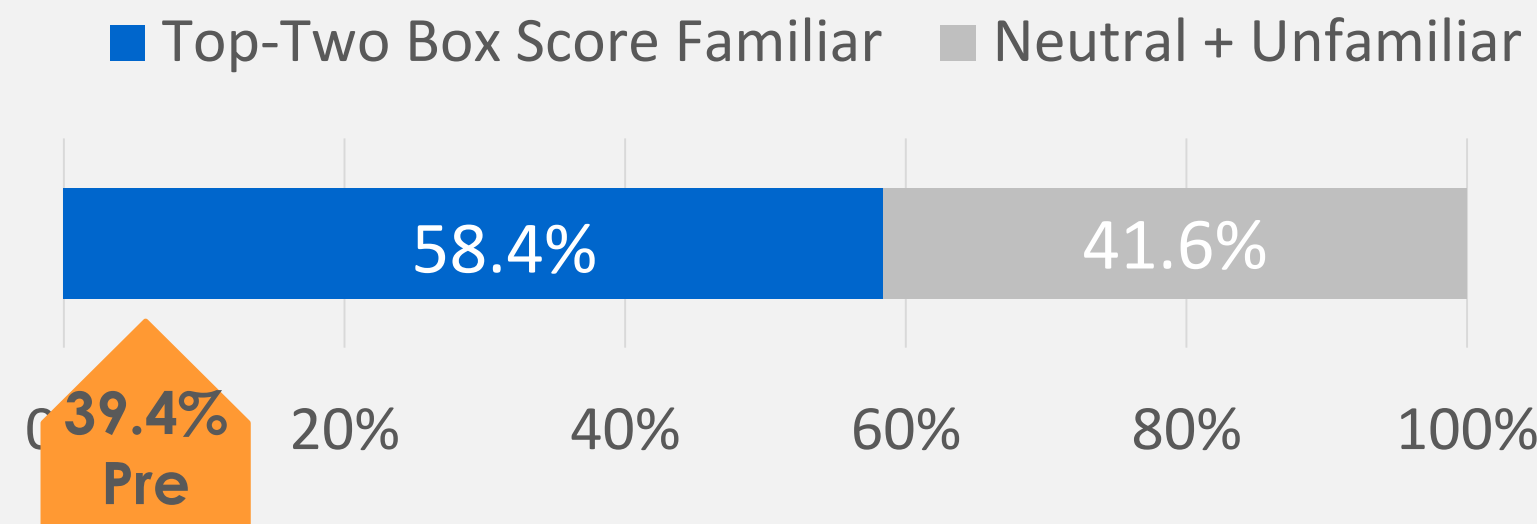
*NOTE: COMPARISONS TO THE TOTAL AGGREGATE PRE-CAMPAIGN FINDINGS ARE CALLED OUT IN ORANGE.*



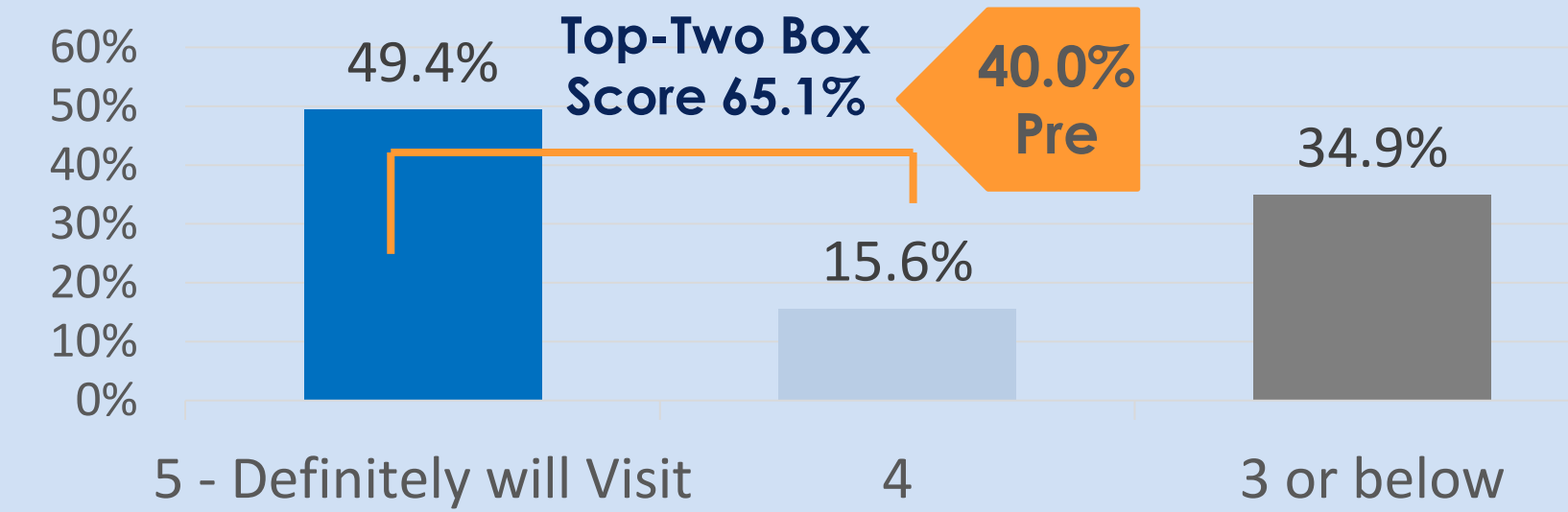
# AD-EXPOSED

(Respondents who recalled seeing one or more of the Maryland ads tested)

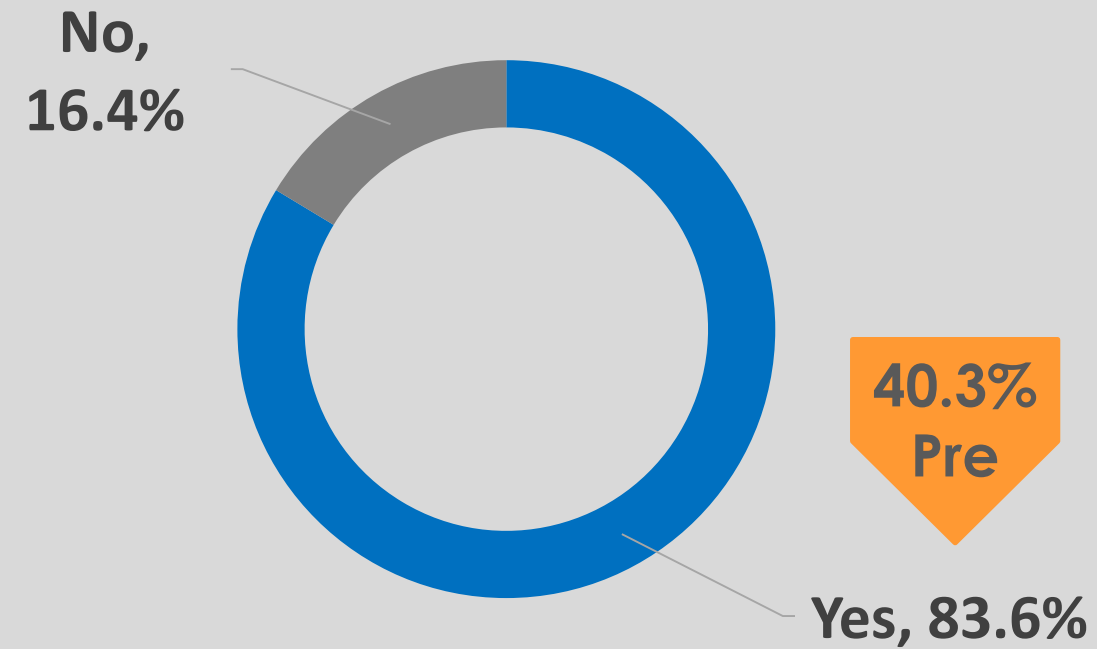
## Familiarity With Maryland



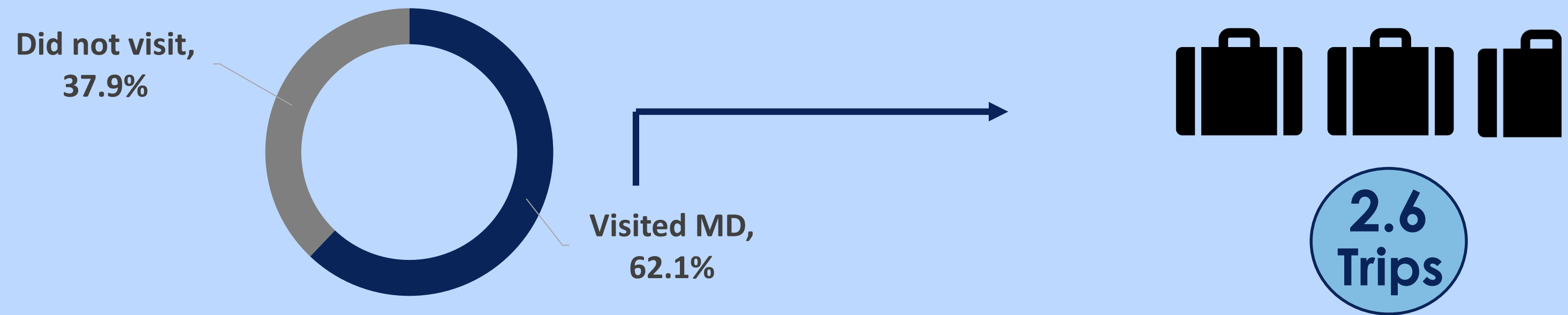
## Likelihood to Visit MD (Next 12 Months)



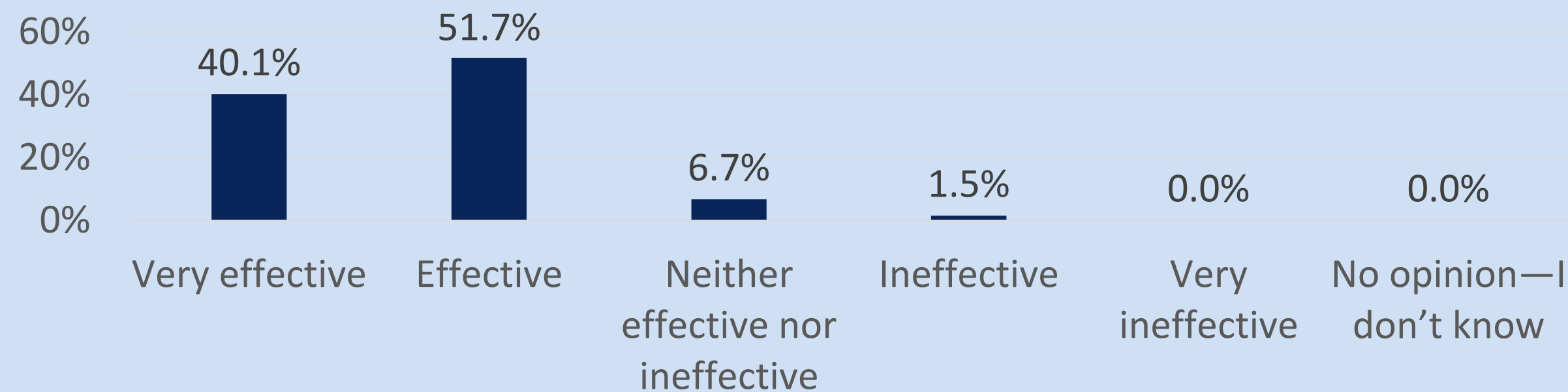
## Earned Media Recall For Maryland



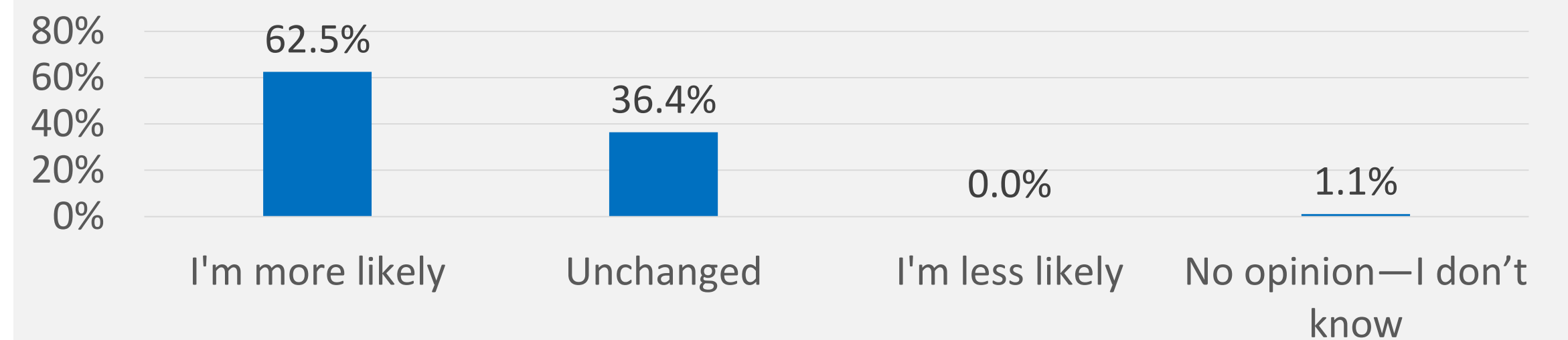
## Visited Maryland in Past 6 Months & Number of MD Trips Taken in That Time Period



## Ads' Effectiveness in Portraying MD as Enjoyable Leisure Destination



## Ads' Affect on Likelihood to Visit MD

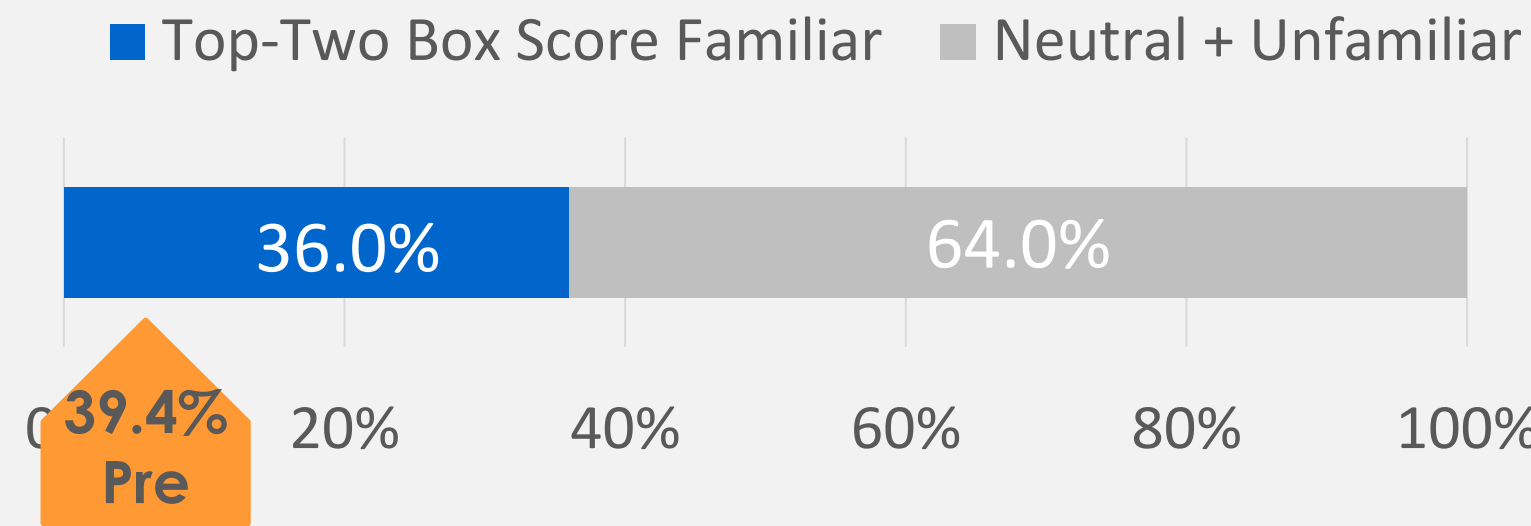




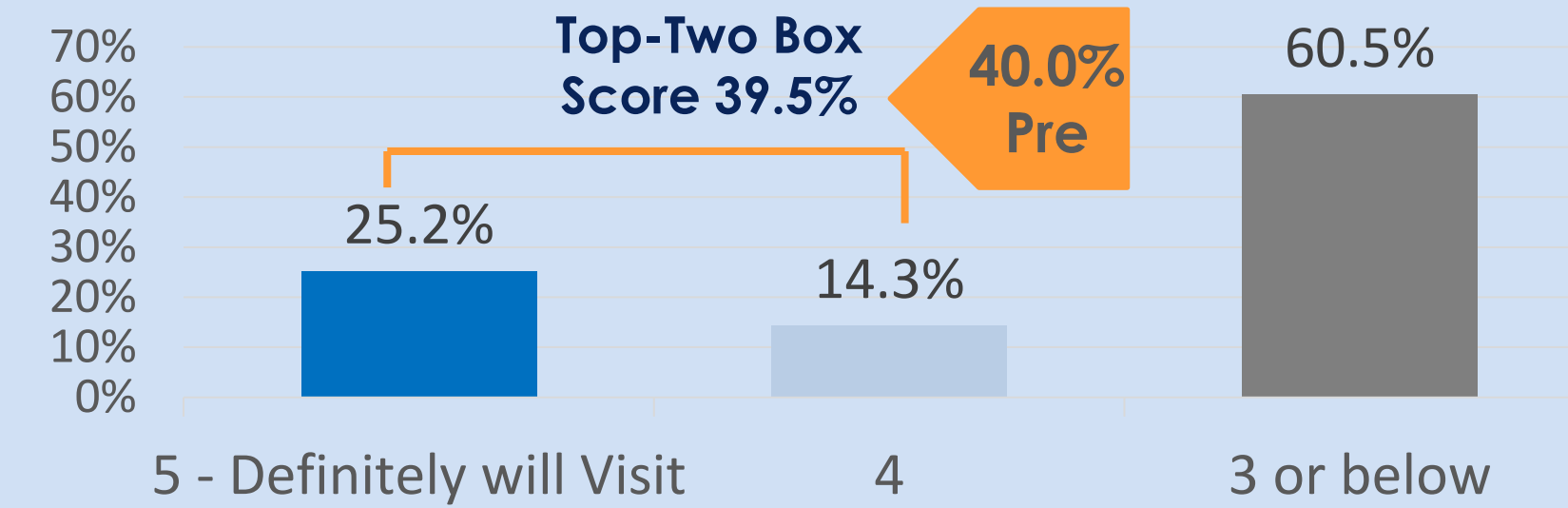
# NON-AD EXPOSED

(Respondents who DID NOT recall seeing any of the Maryland ads tested)

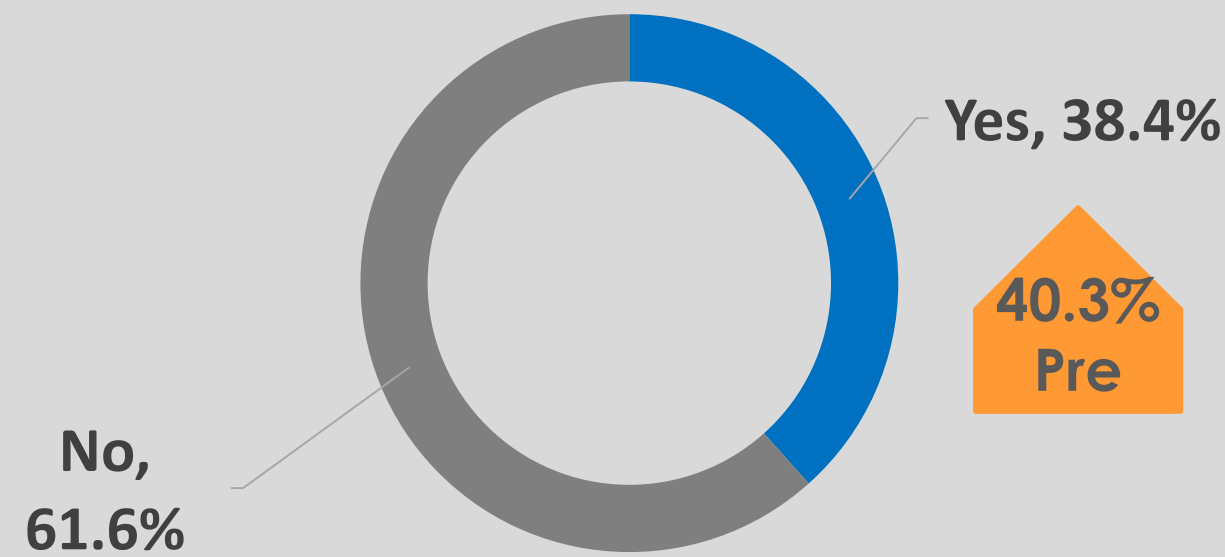
## Familiarity With Maryland



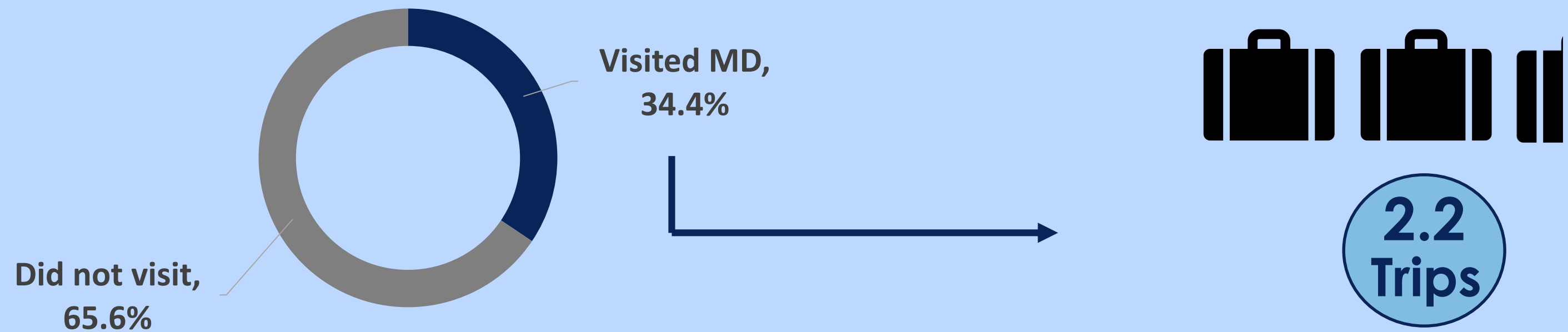
## Likelihood to Visit MD (Next 12 Months)



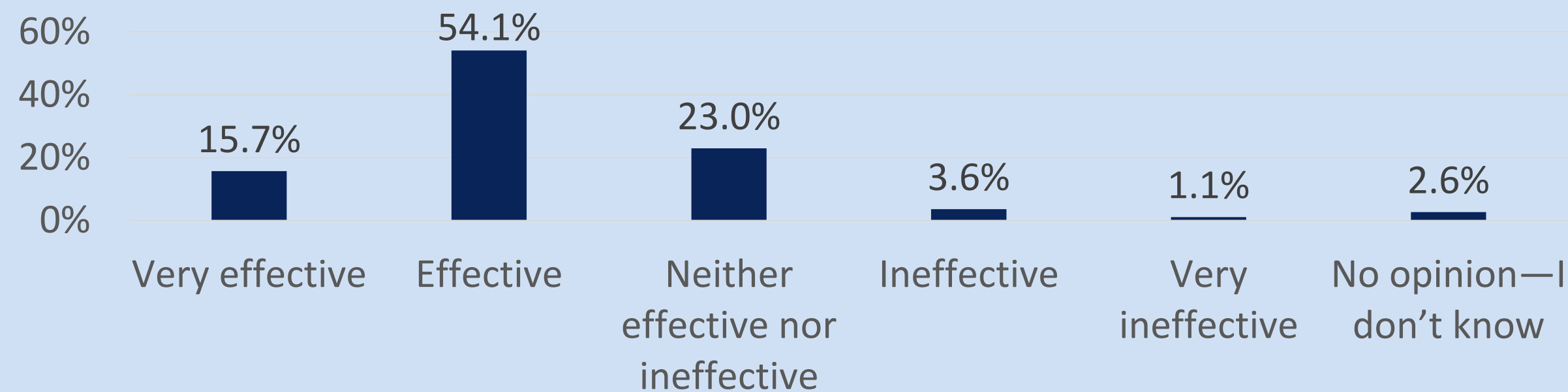
## Earned Media Recall For Maryland



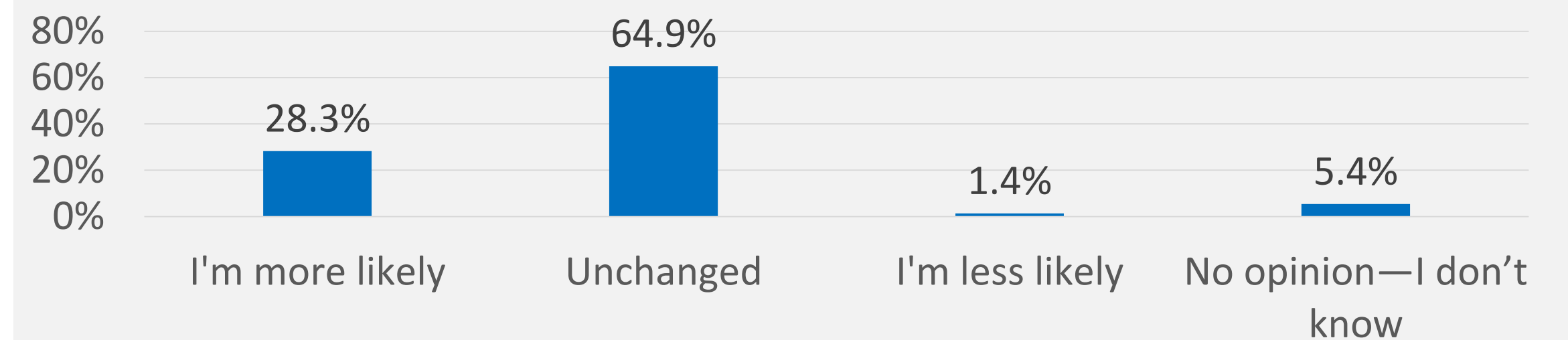
## Visited Maryland in Past 6 Months & Number of MD Trips Taken in That Time Period



## Ads' Effectiveness in Portraying MD as Enjoyable Leisure Destination



## Ads' Affect on Likelihood to Visit MD





A row of colorful townhouses with a semi-transparent white overlay. The houses are in shades of blue, yellow, and red, with white trim and multiple windows. The scene is set in a residential neighborhood with trees and a sidewalk.

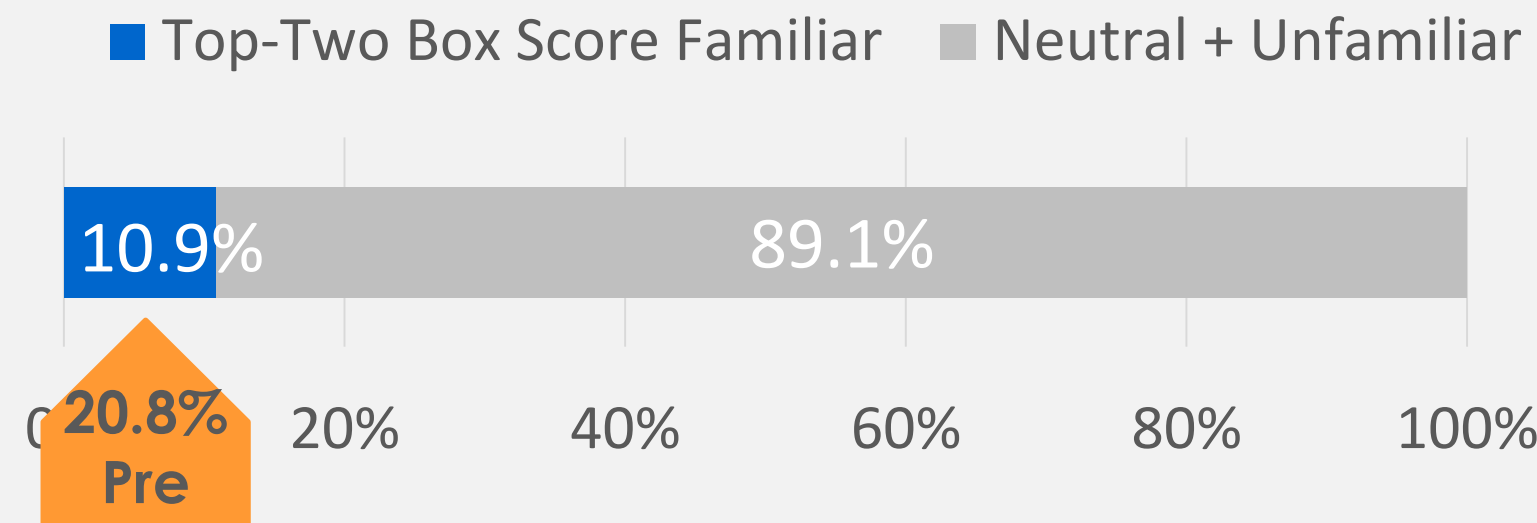
# SEGMENT SUMMARIES BY MARKET OF STUDY

*NOTE: IN THE FOLLOWING SECTION, COMPARISONS TO THE  
PRE-CAMPAIGN SURVEY FINDINGS ARE CALLED OUT IN ORANGE.*

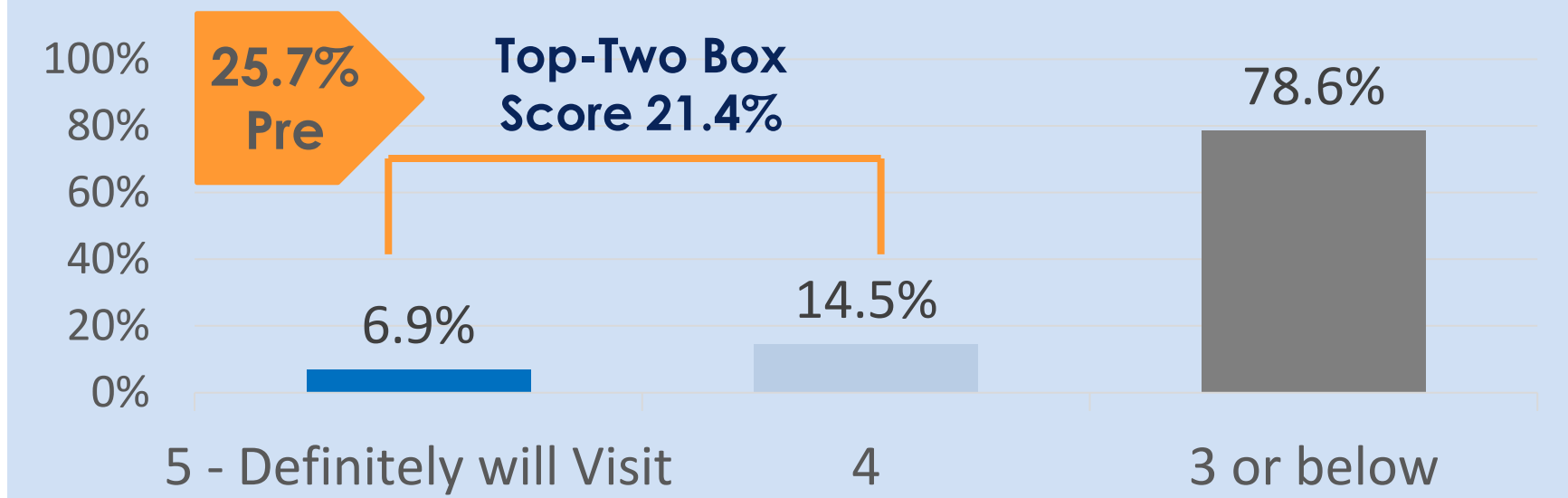


# ALBANY (CONTROL MARKET)

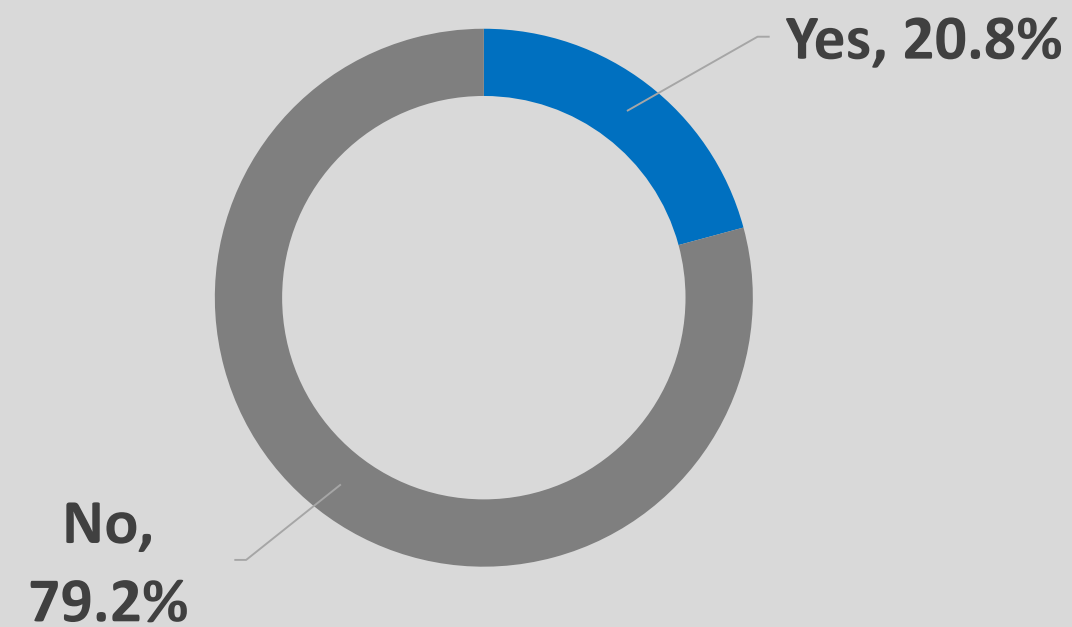
## Familiarity With Maryland



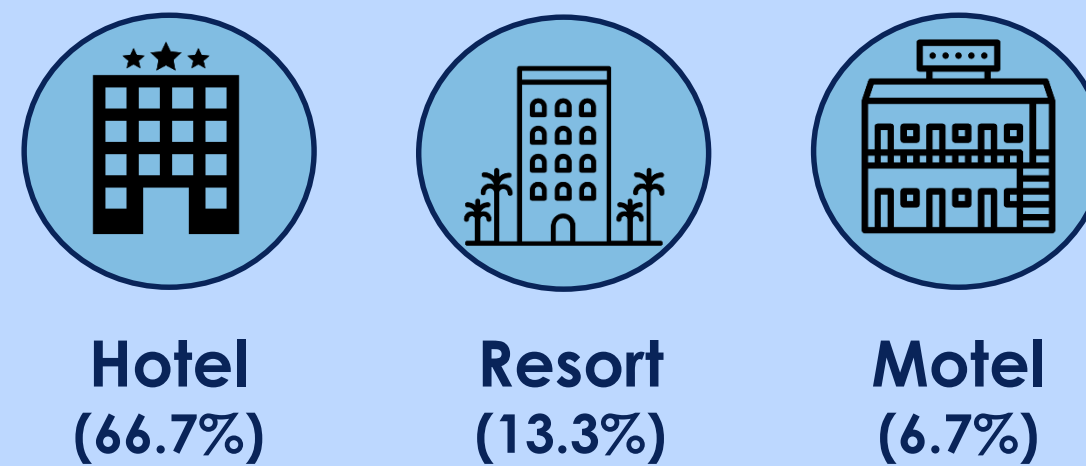
## Likelihood to Visit MD (Next 12 Months)



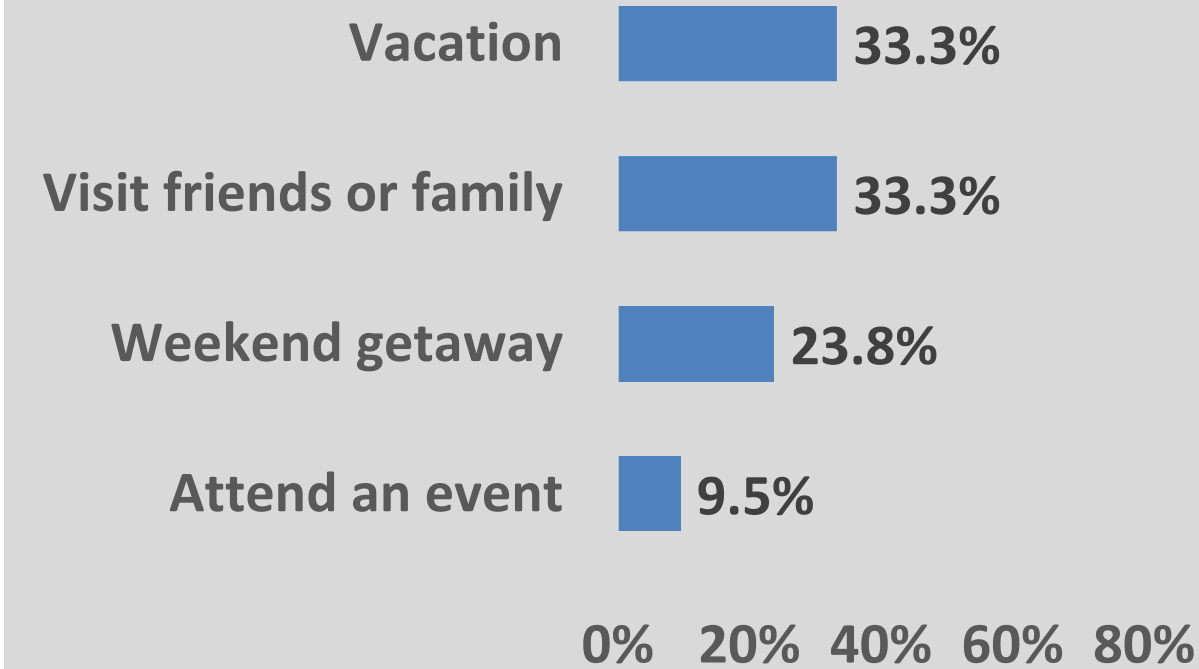
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



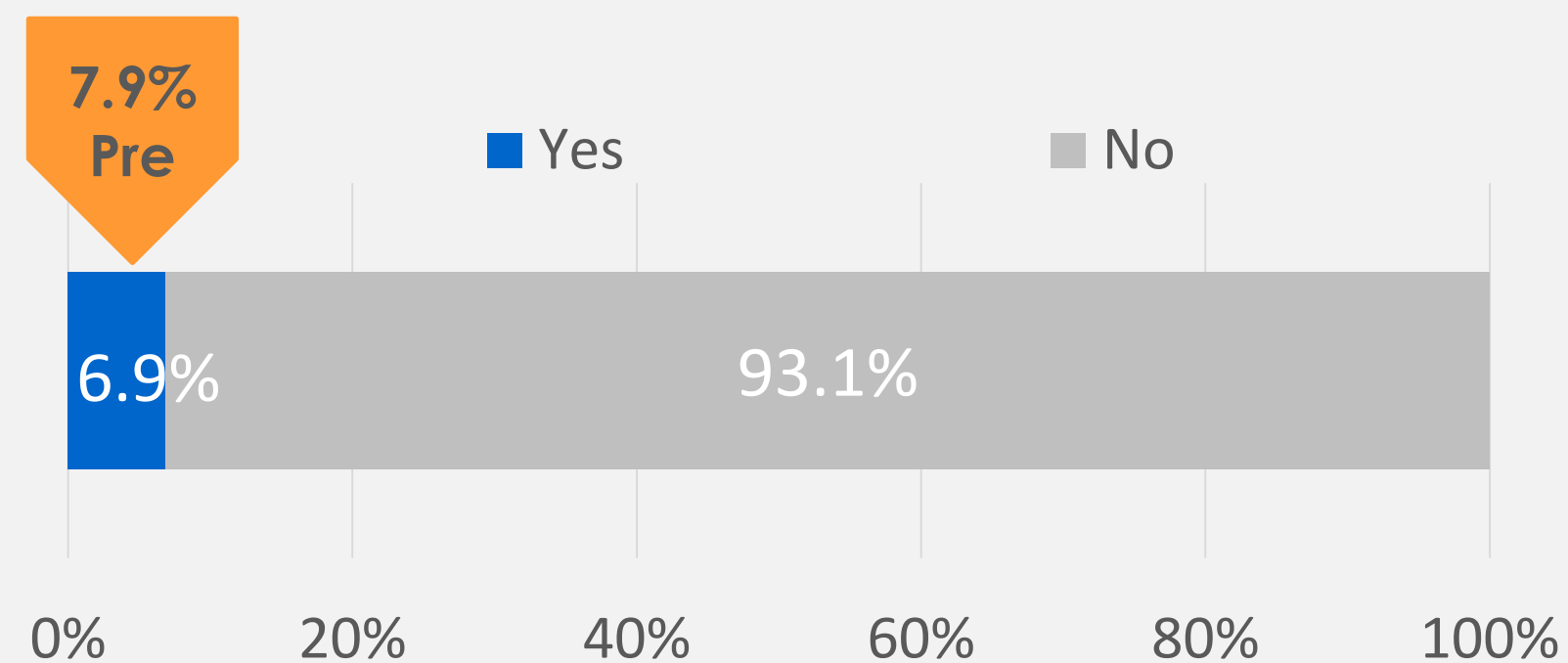
## Top Reasons for Visiting



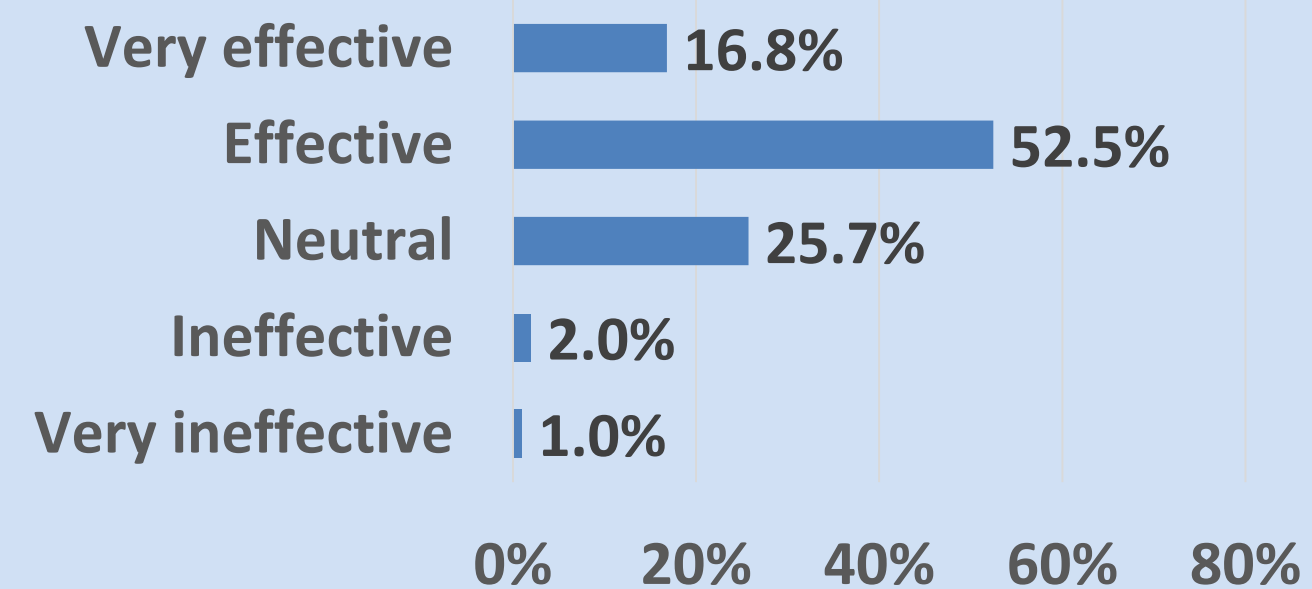
## Total In-Market Spend



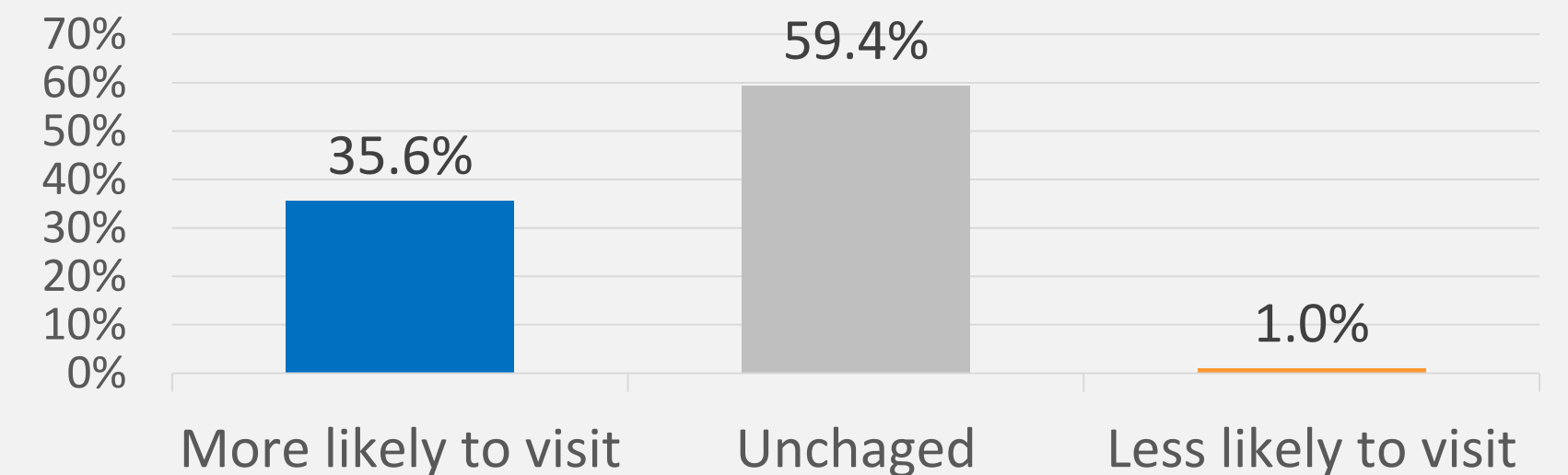
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



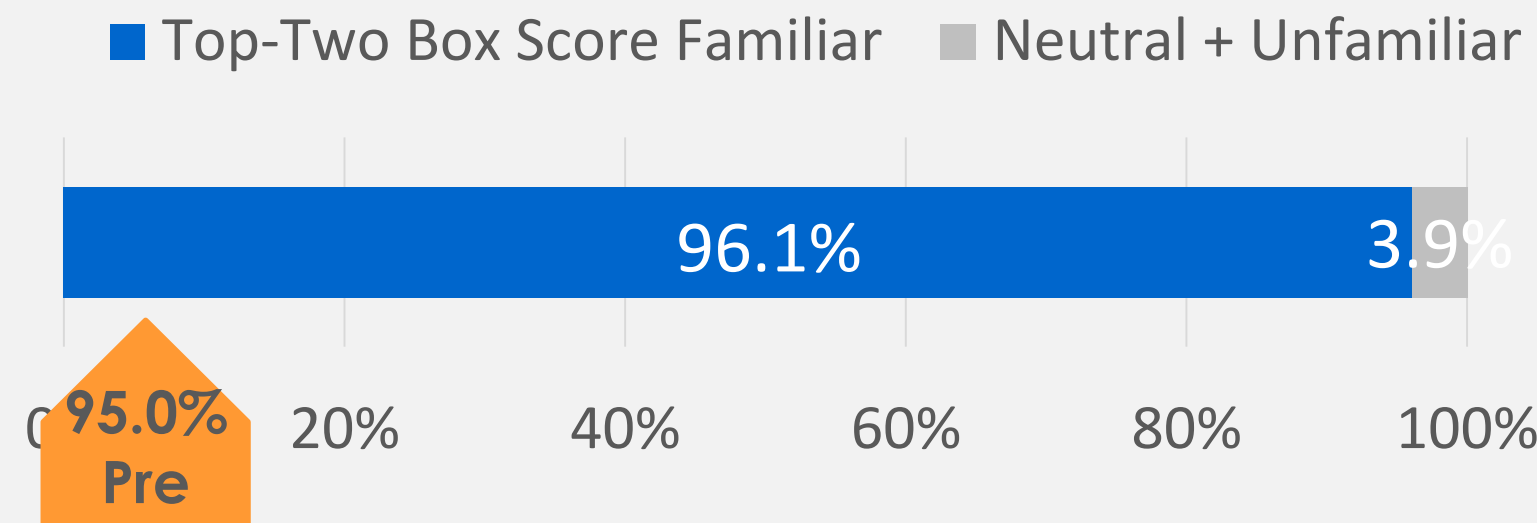
## Ads' Affect on Likelihood to Visit MD



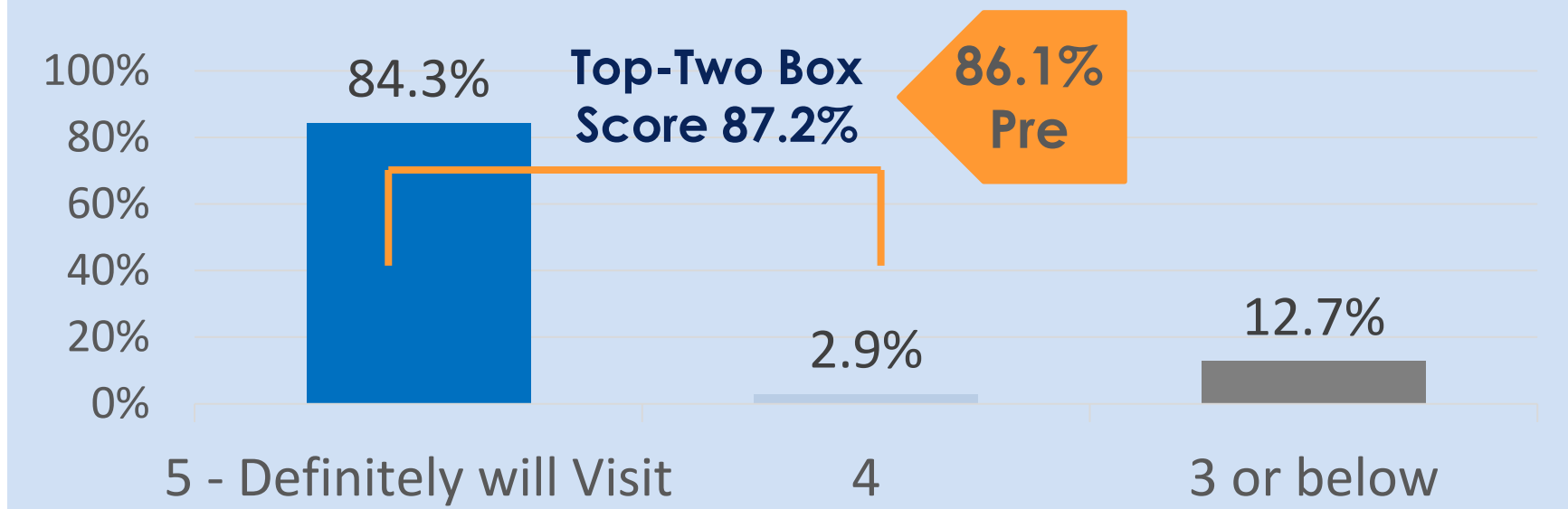


# BALTIMORE

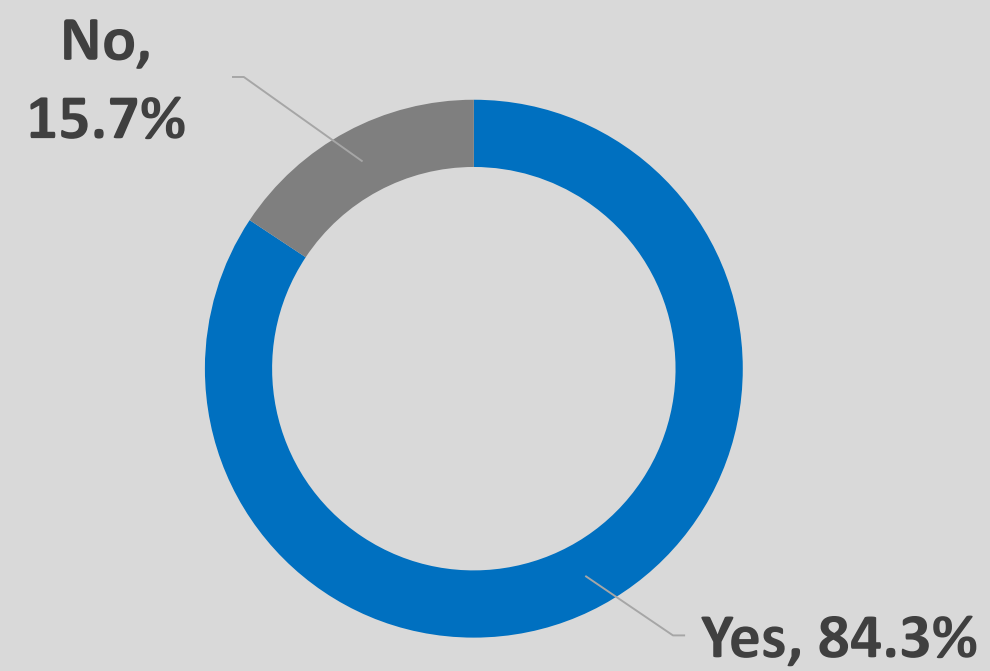
## Familiarity With Maryland



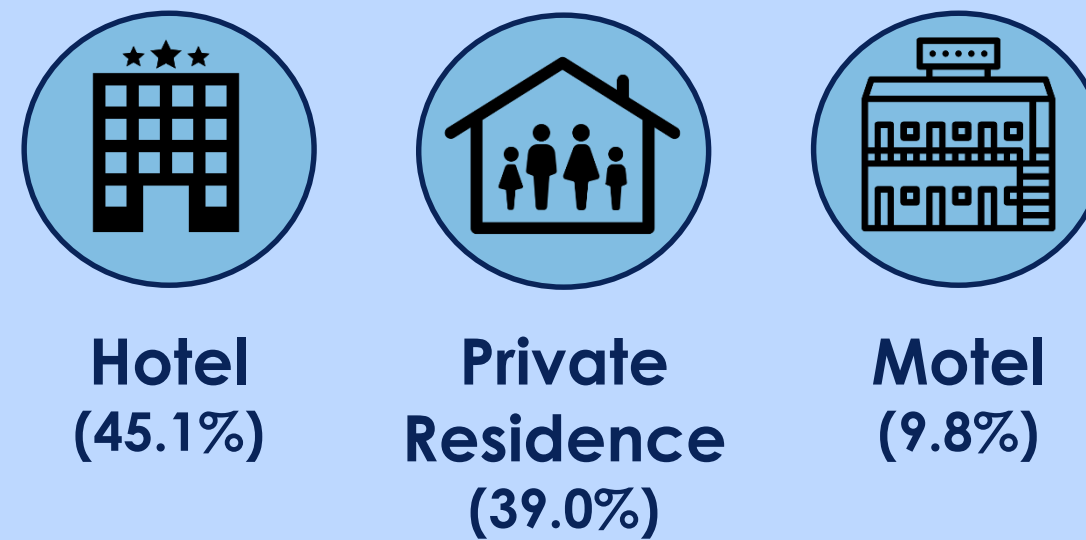
## Likelihood to Visit MD (Next 12 Months)



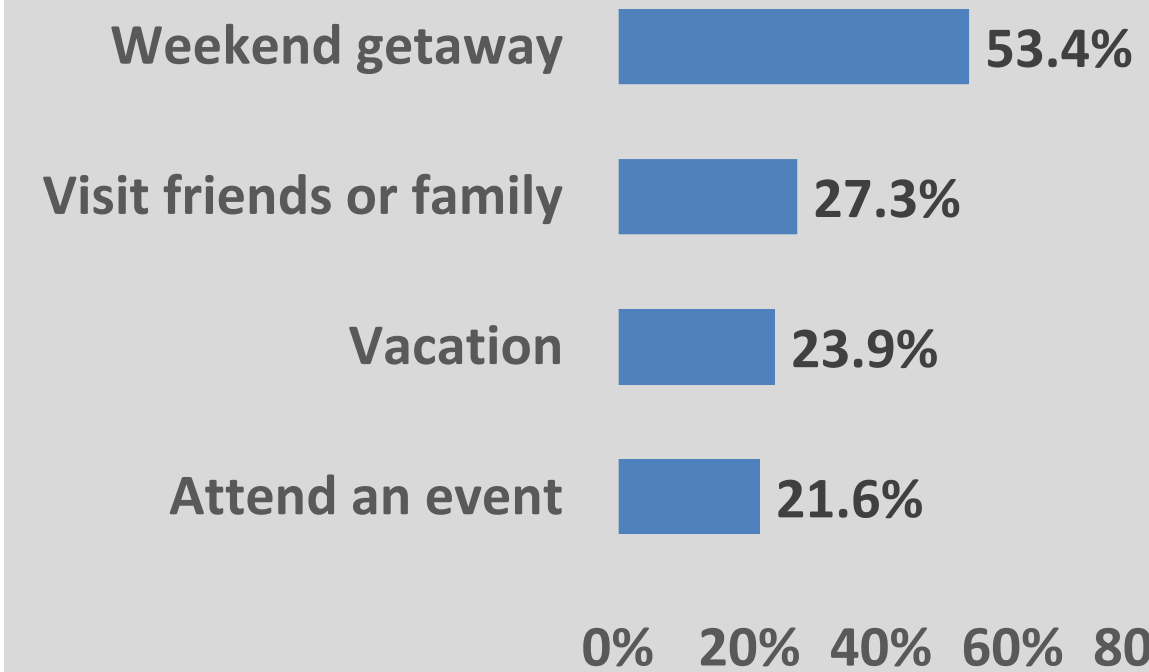
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



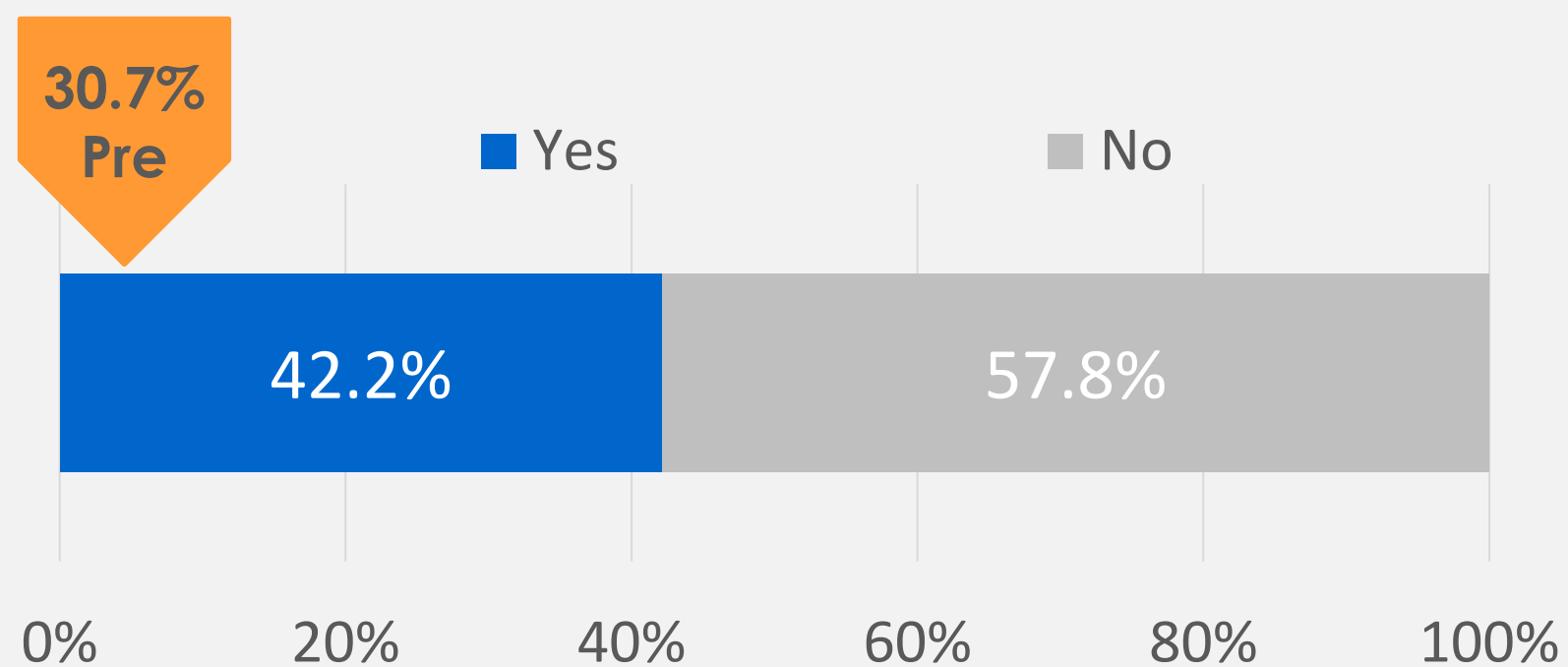
## Top Reasons for Visiting



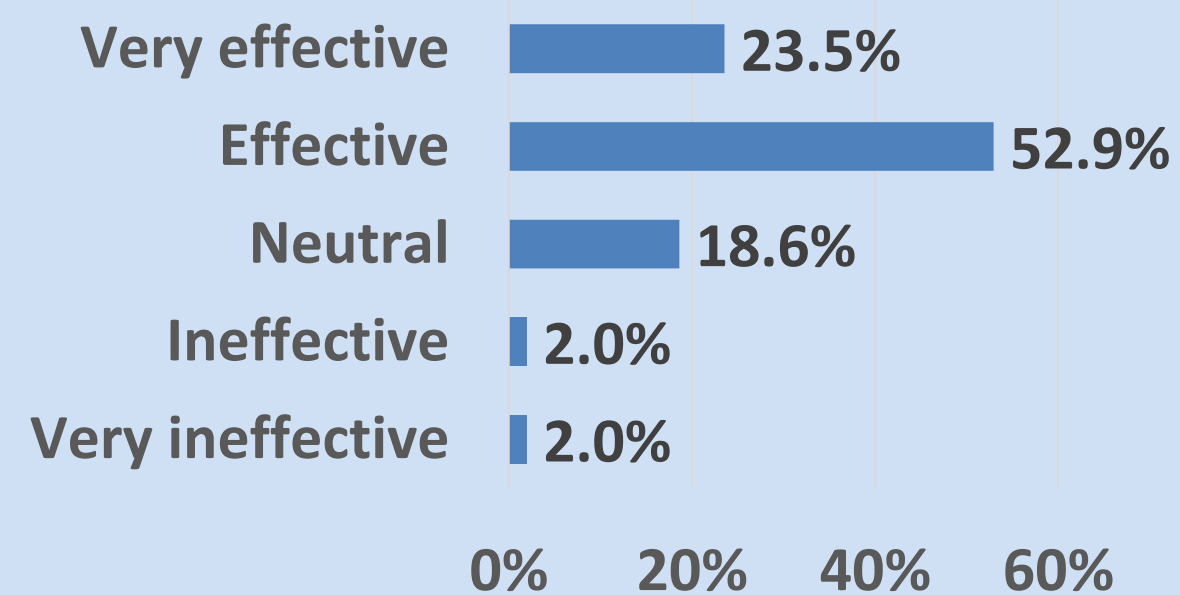
## Total In-Market Spend



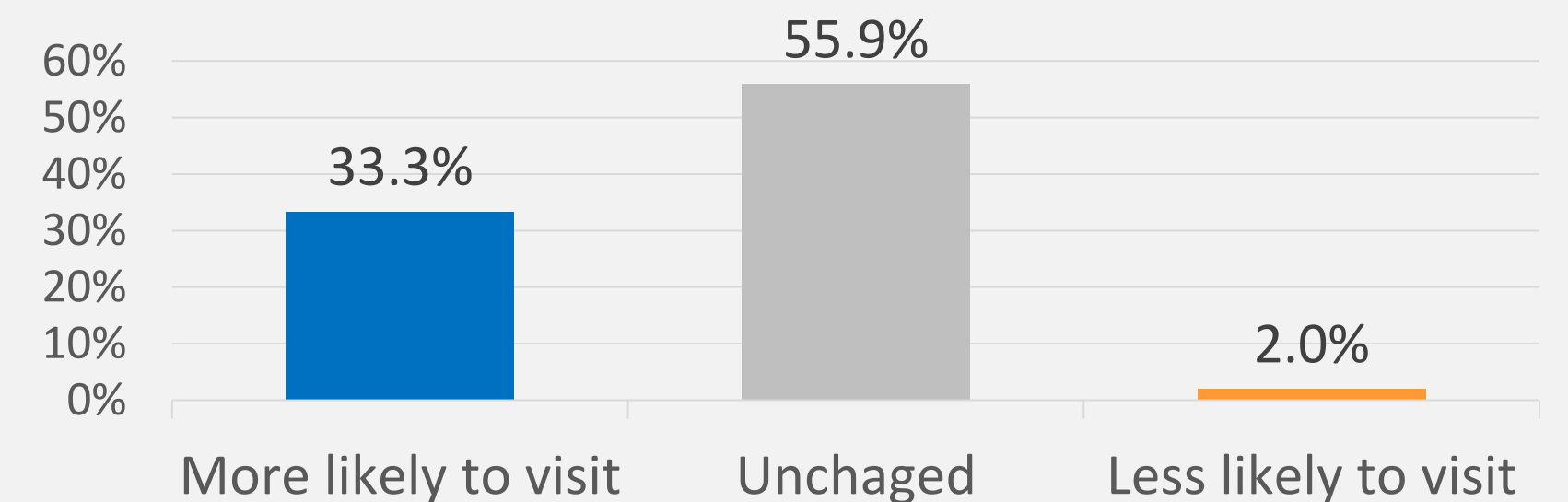
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



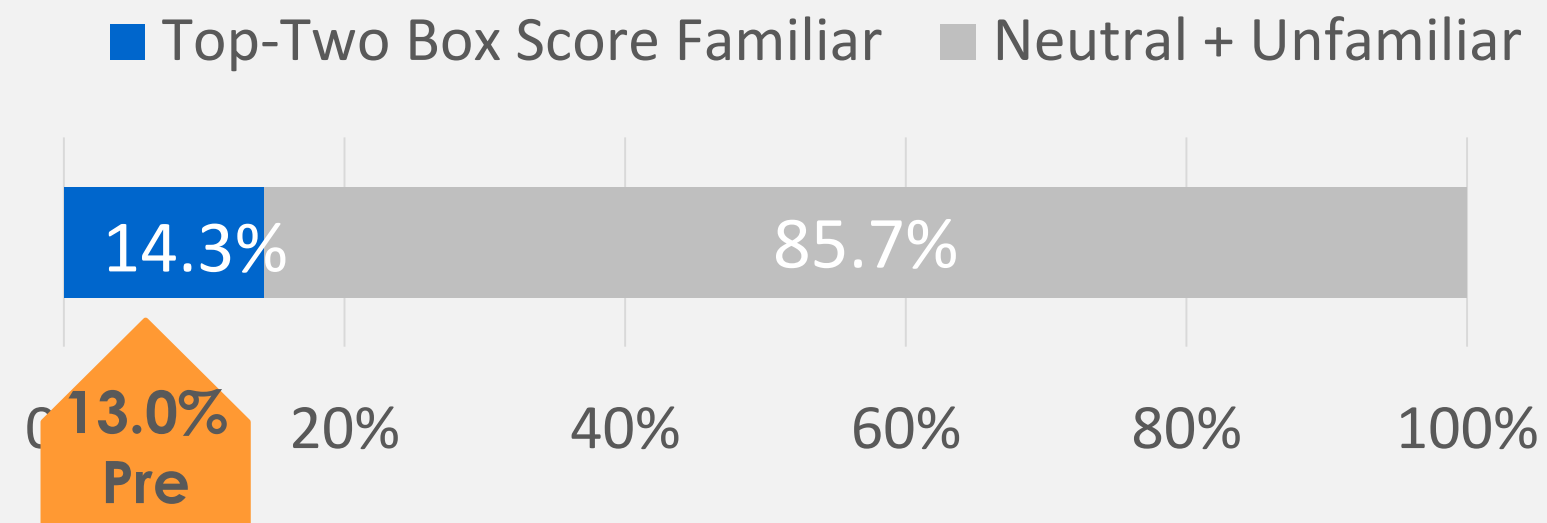
## Ads' Affect on Likelihood to Visit MD



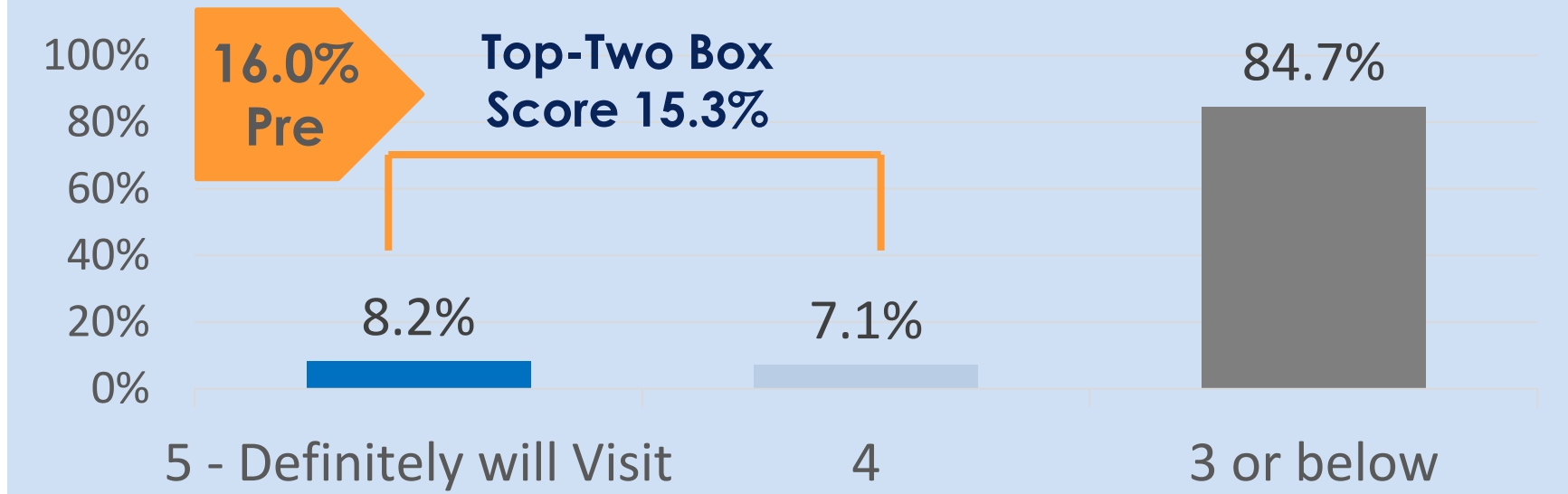


# CINCINNATI

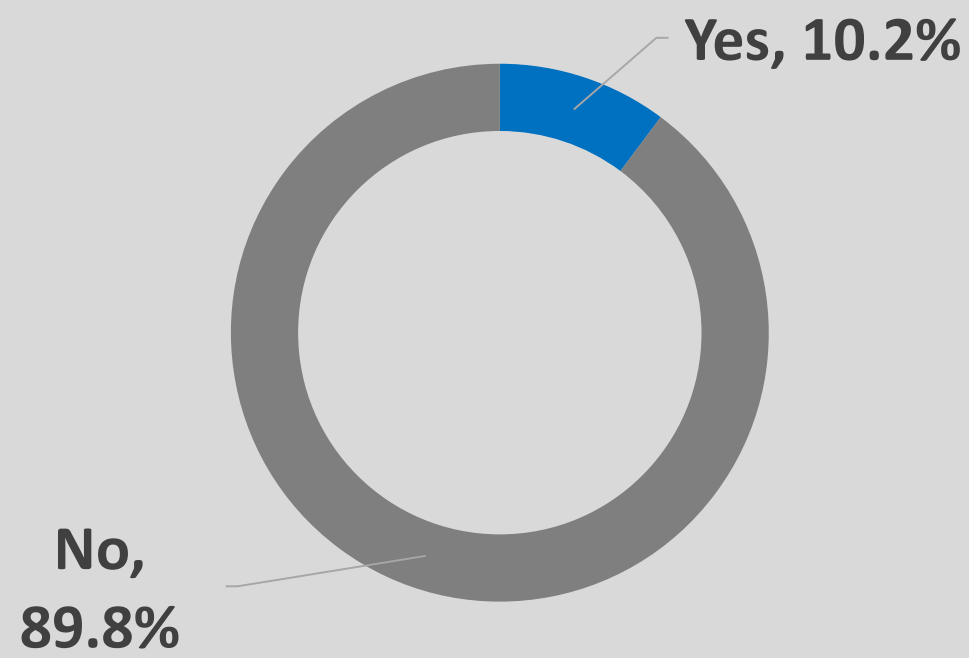
## Familiarity With Maryland



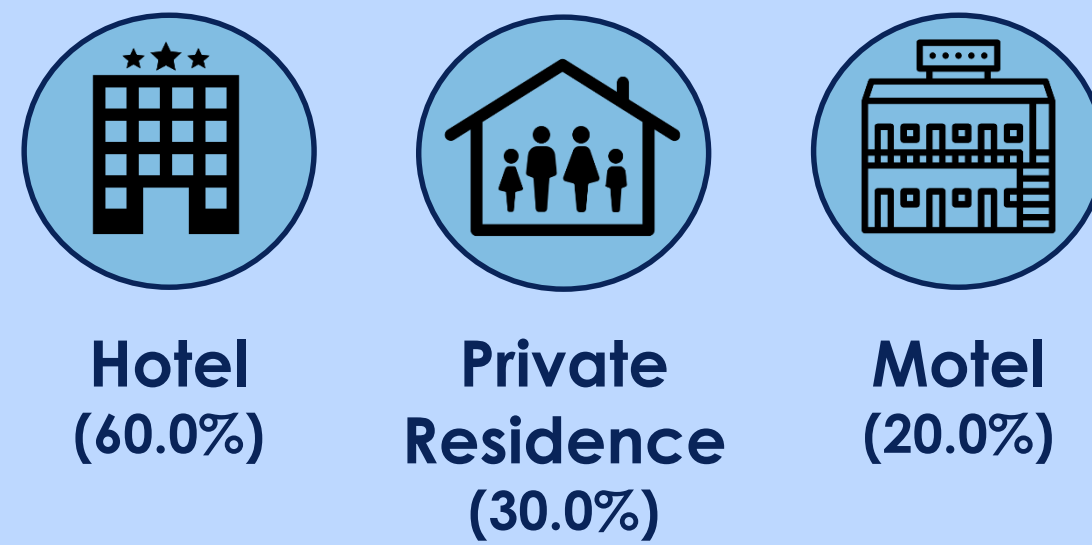
## Likelihood to Visit MD (Next 12 Months)



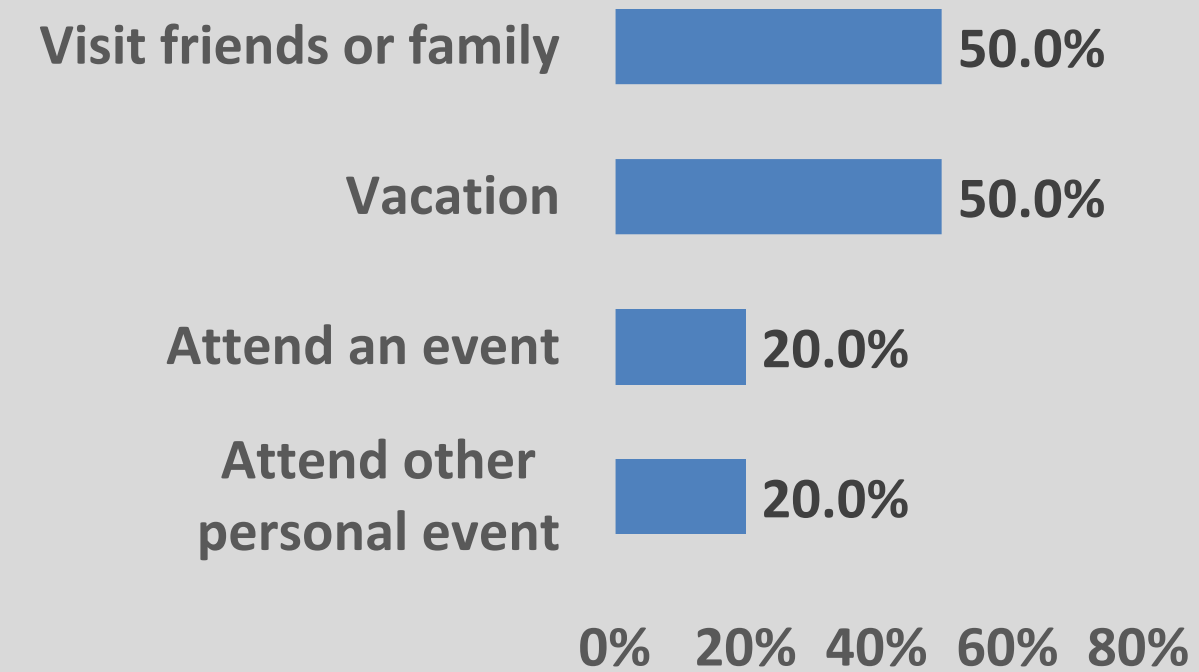
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



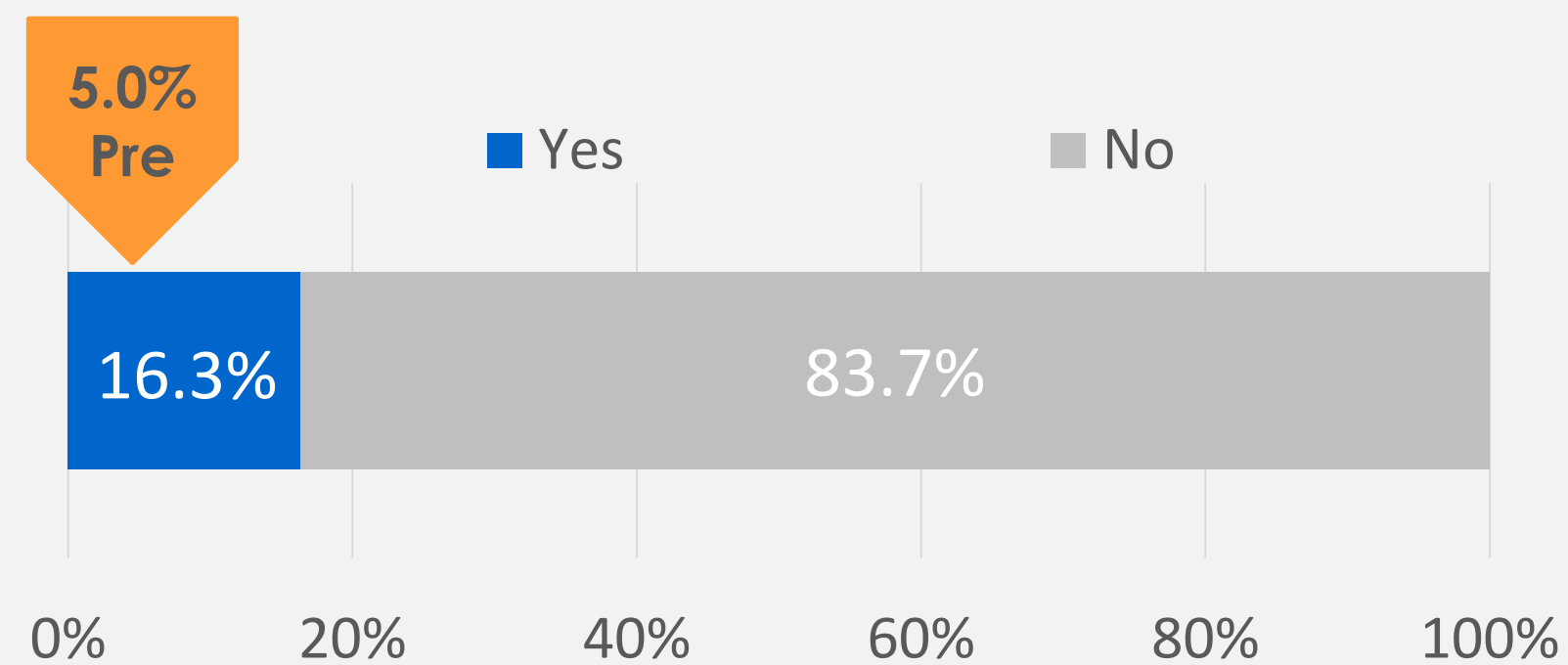
## Top Reasons for Visiting



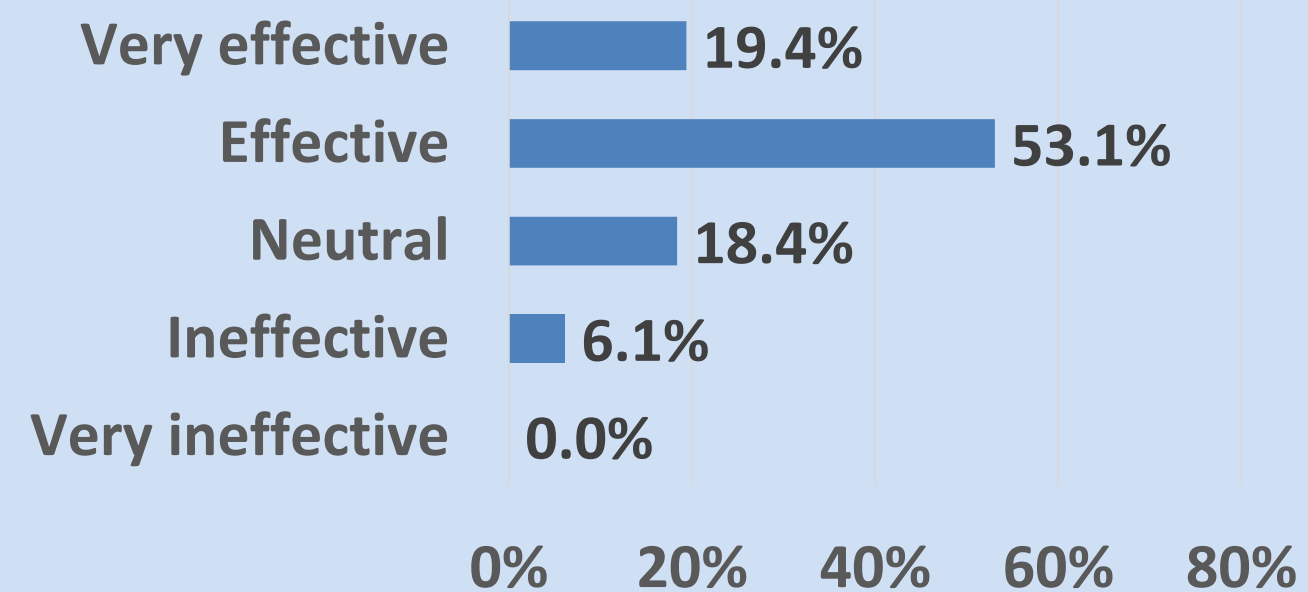
## Total In-Market Spend



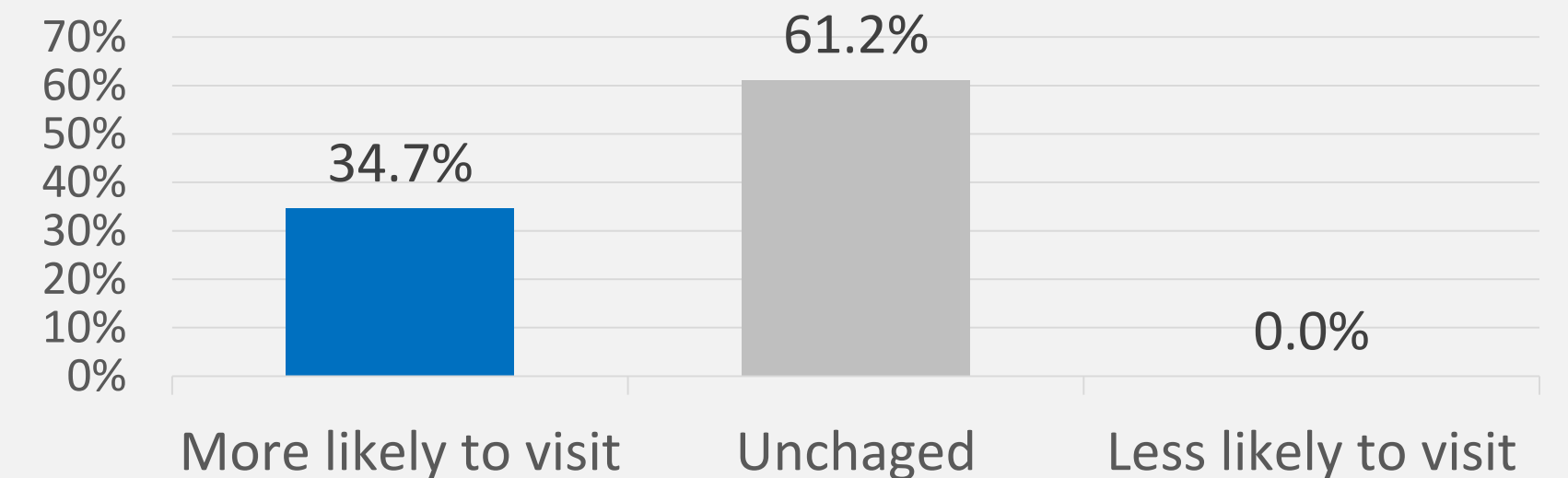
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



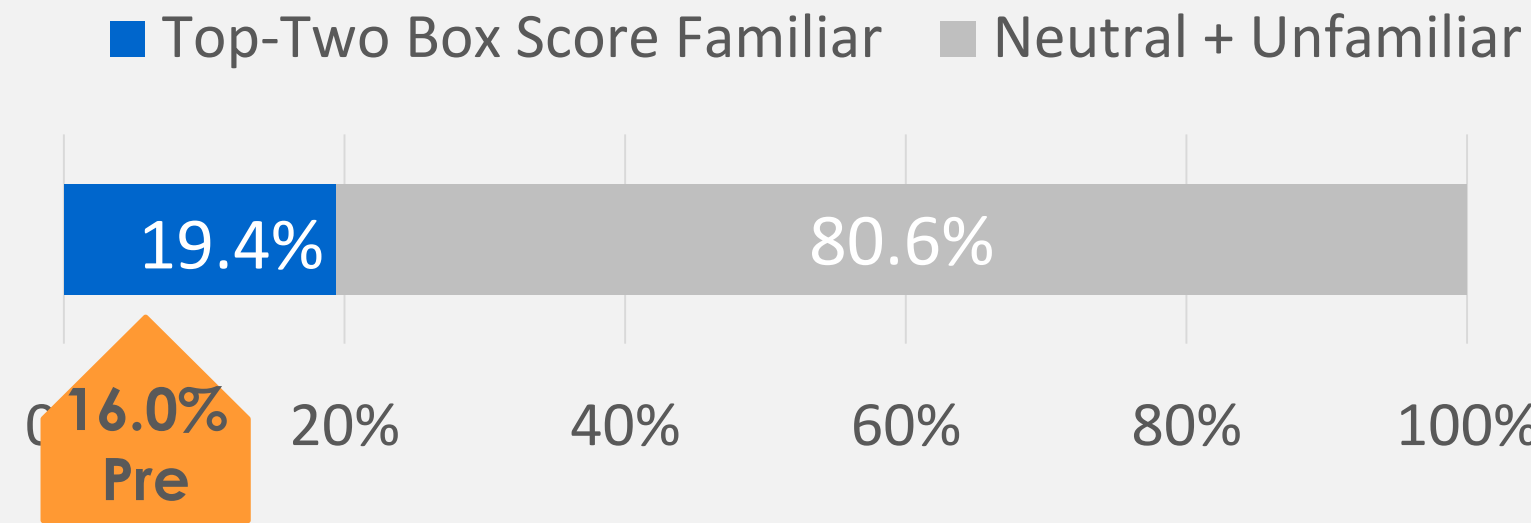
## Ads' Affect on Likelihood to Visit MD



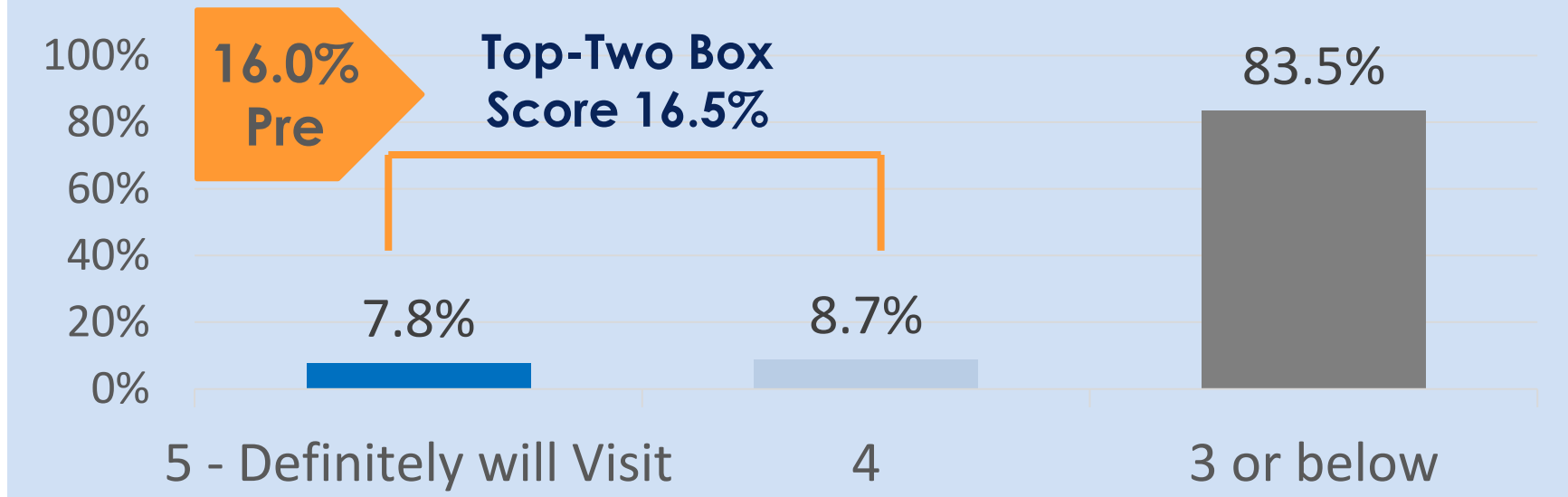


# CLEVELAND

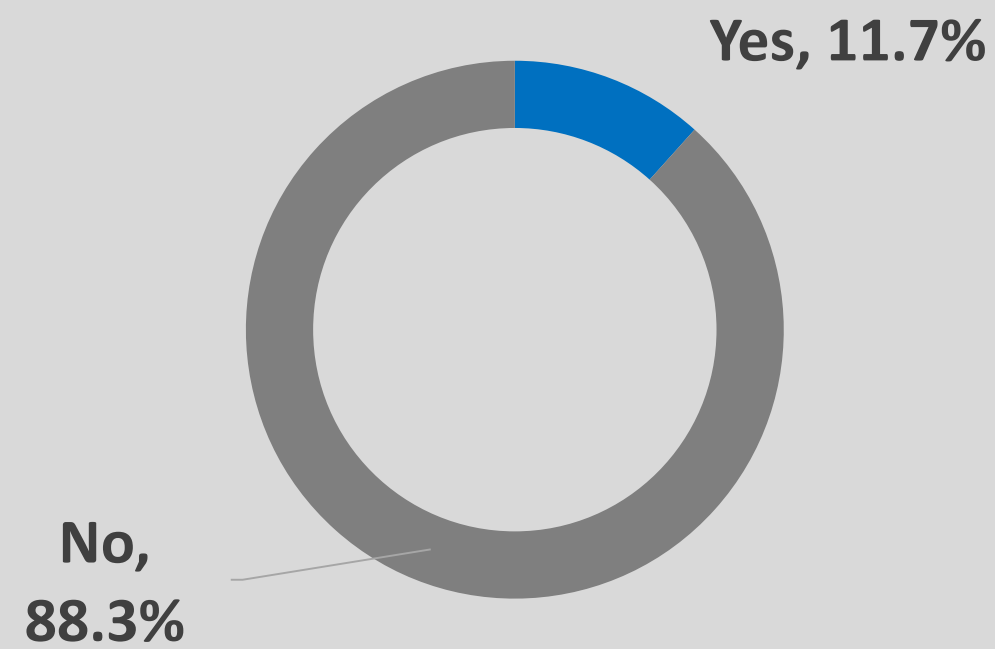
## Familiarity With Maryland



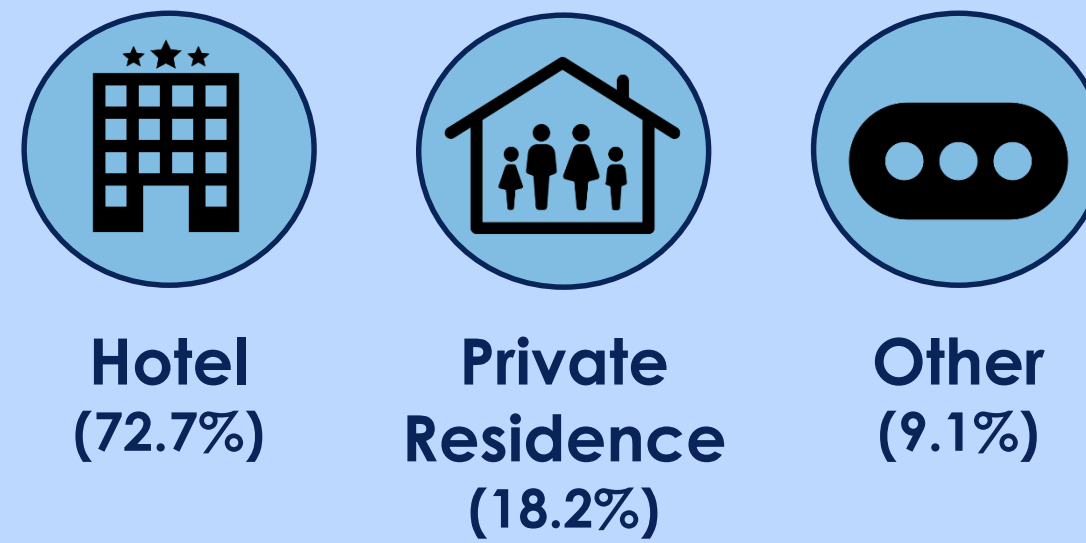
## Likelihood to Visit MD (Next 12 Months)



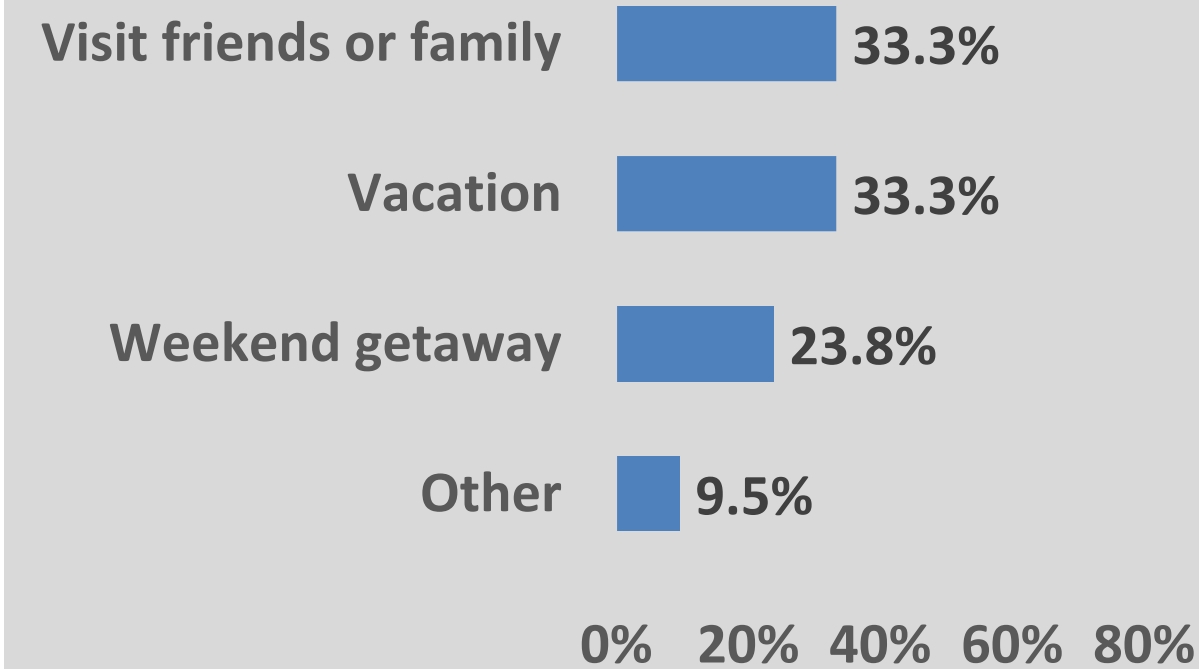
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



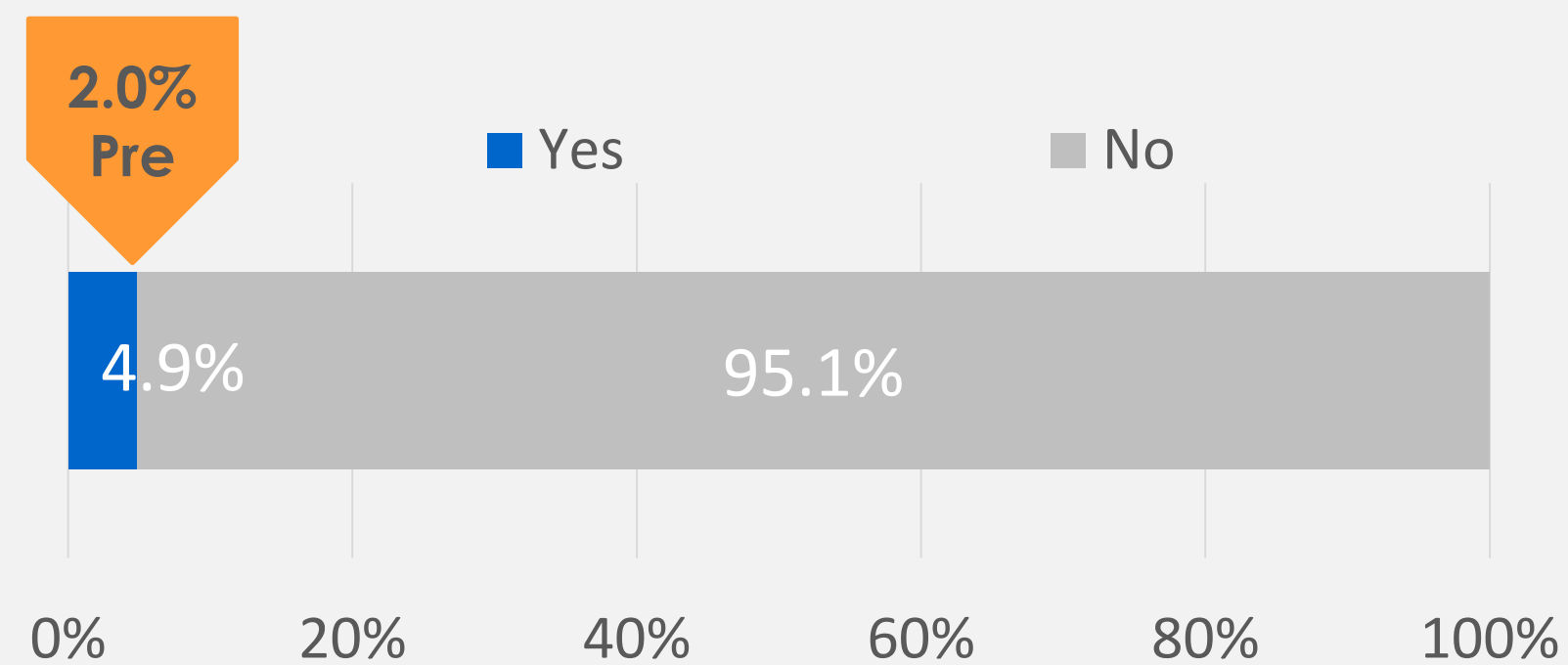
## Top Reasons for Visiting



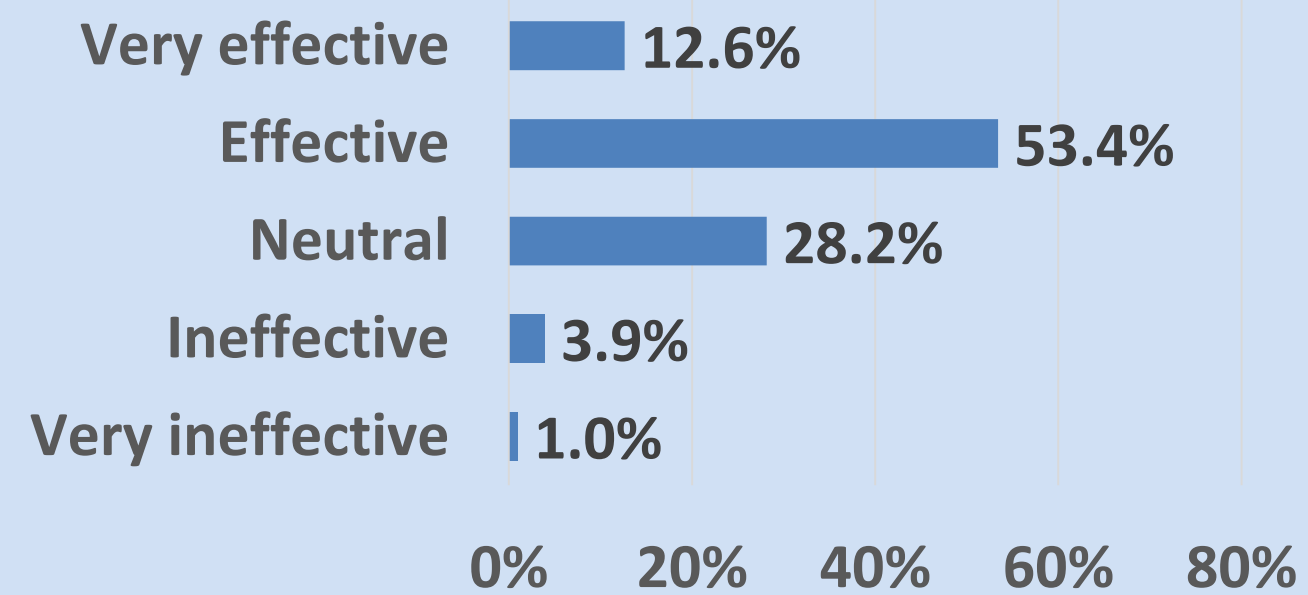
## Total In-Market Spend



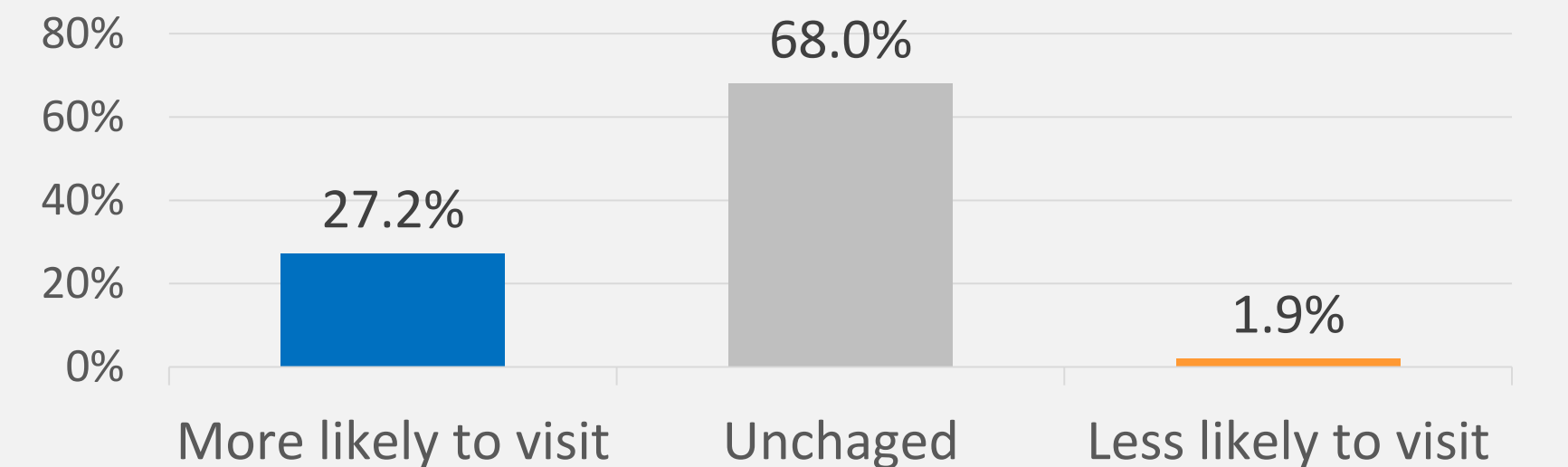
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



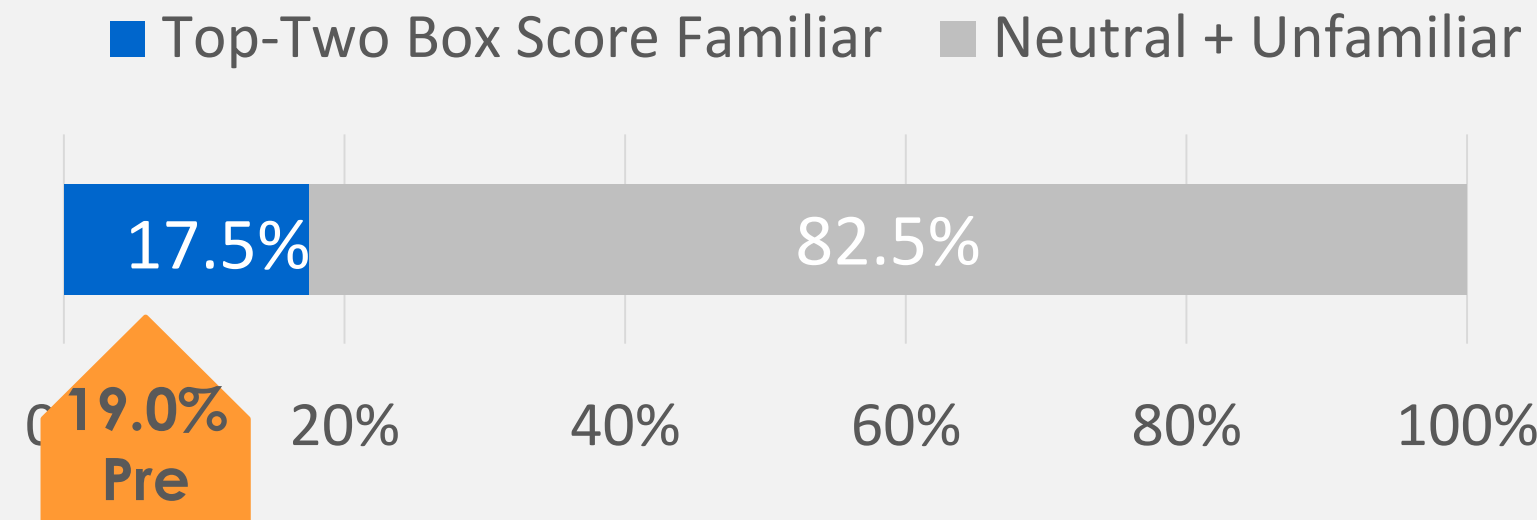
## Ads' Affect on Likelihood to Visit MD



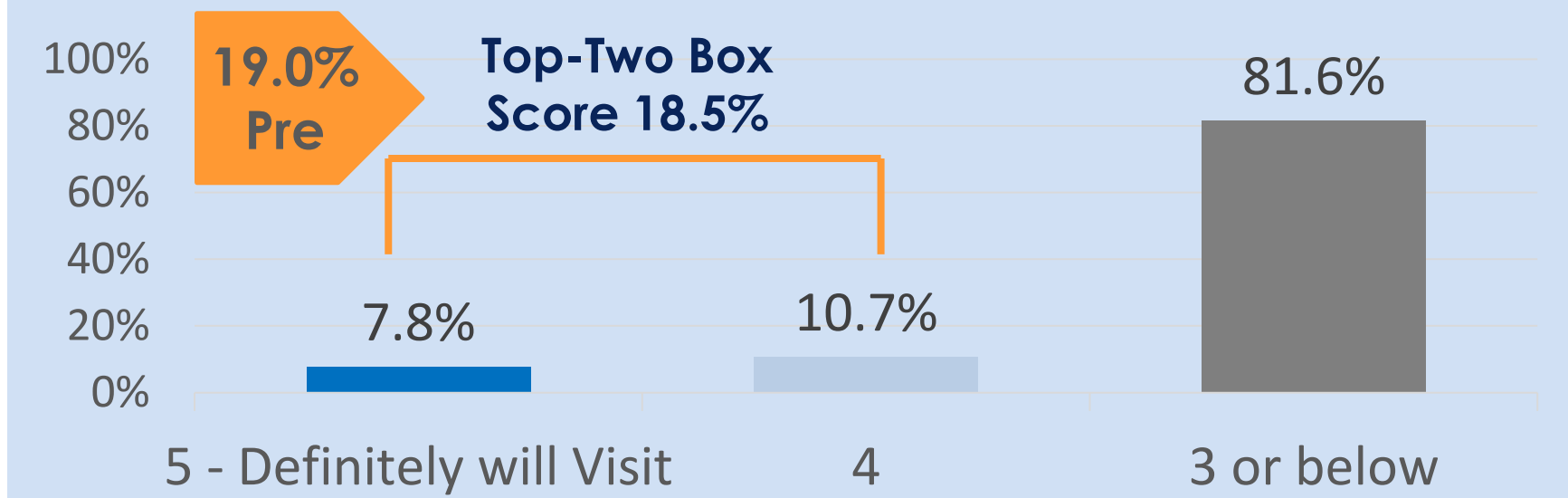


# COLUMBUS

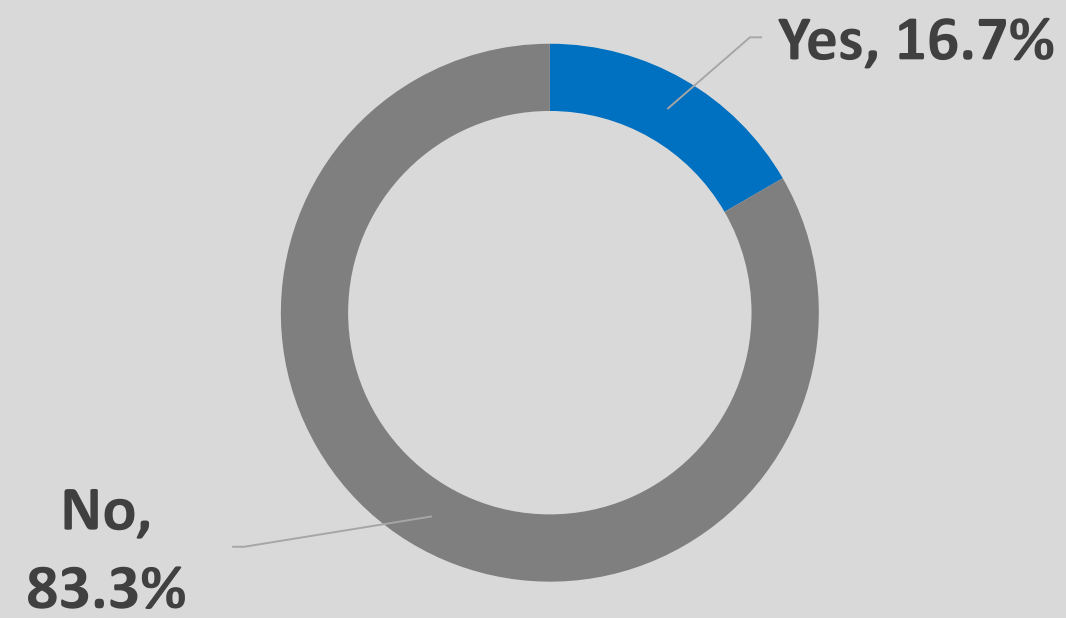
## Familiarity With Maryland



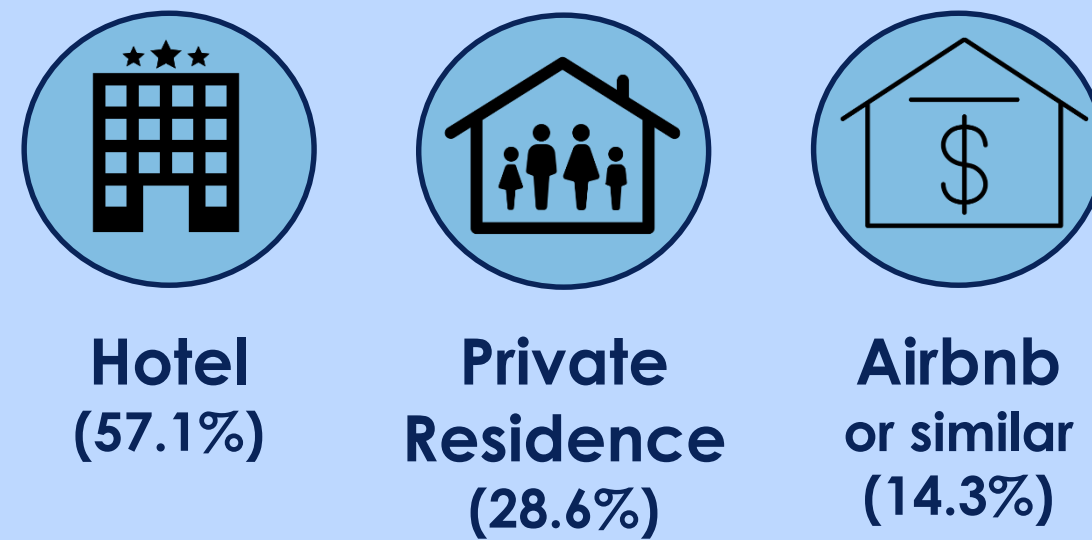
## Likelihood to Visit MD (Next 12 Months)



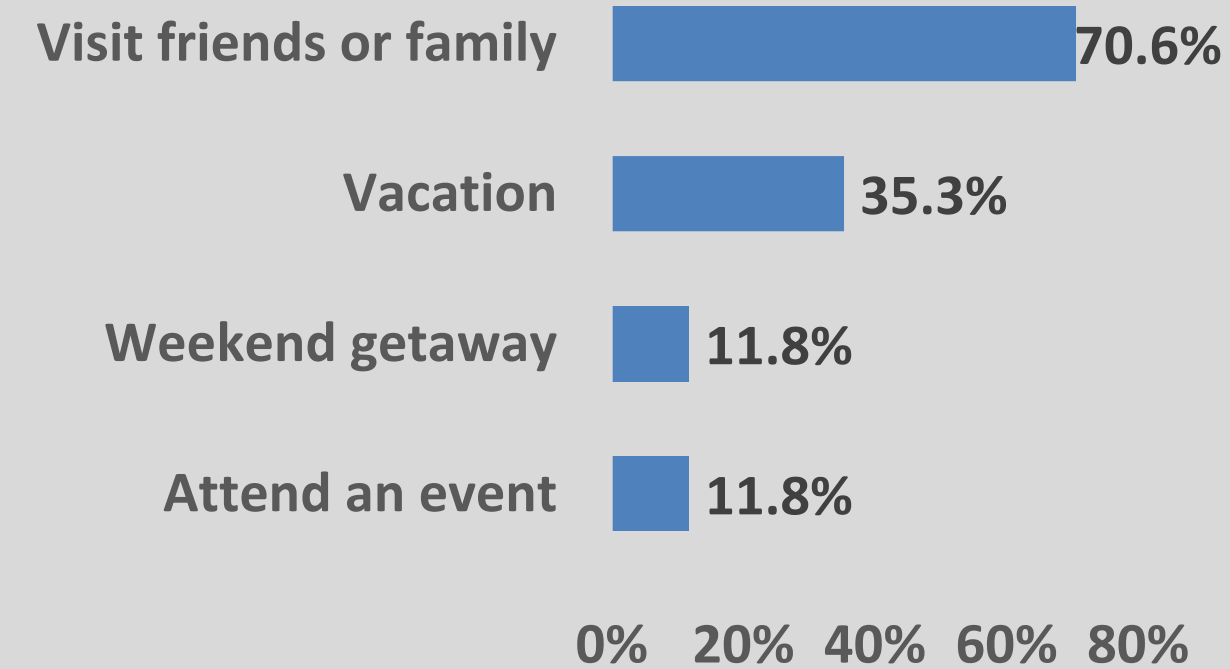
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



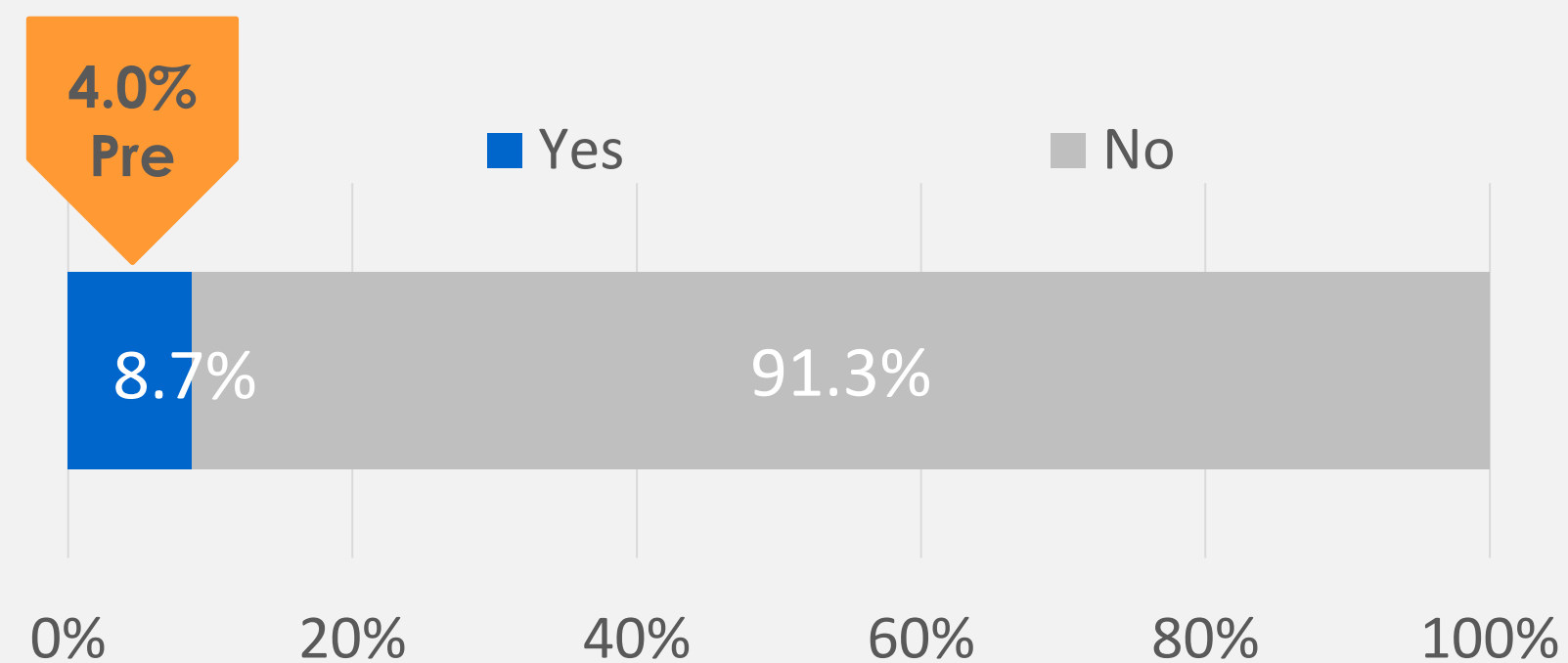
## Top Reasons for Visiting



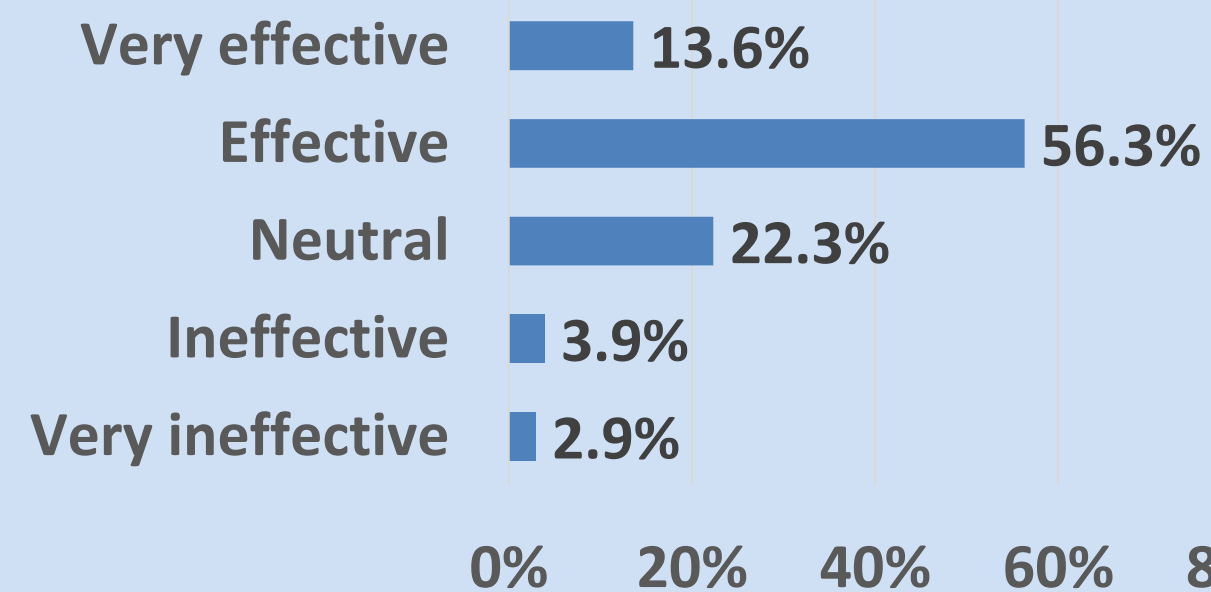
## Total In-Market Spend



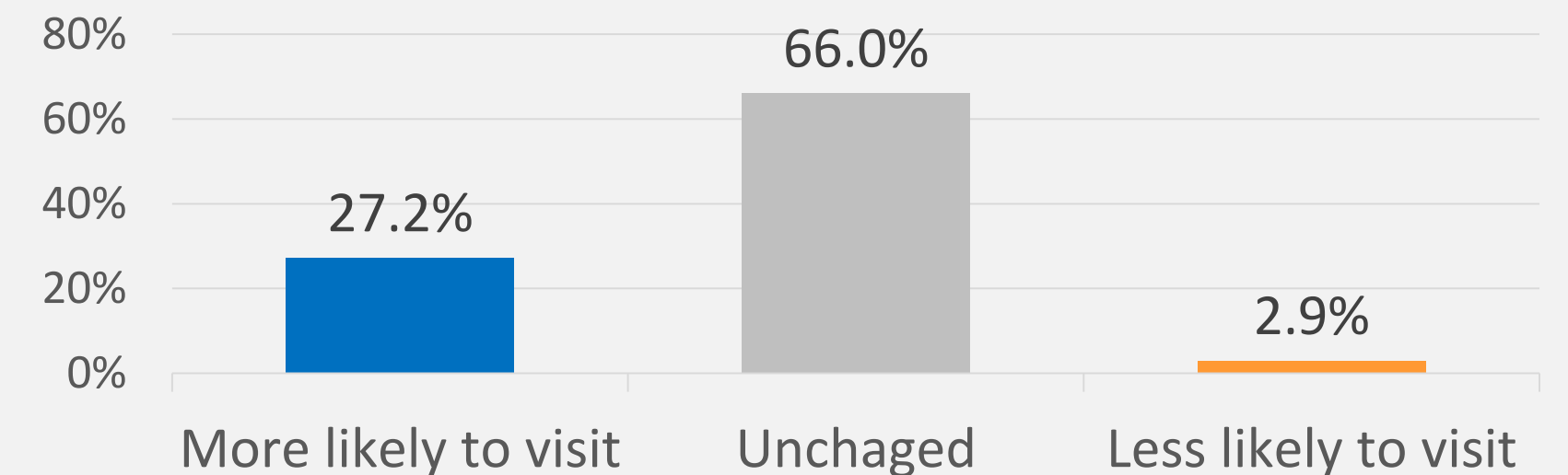
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



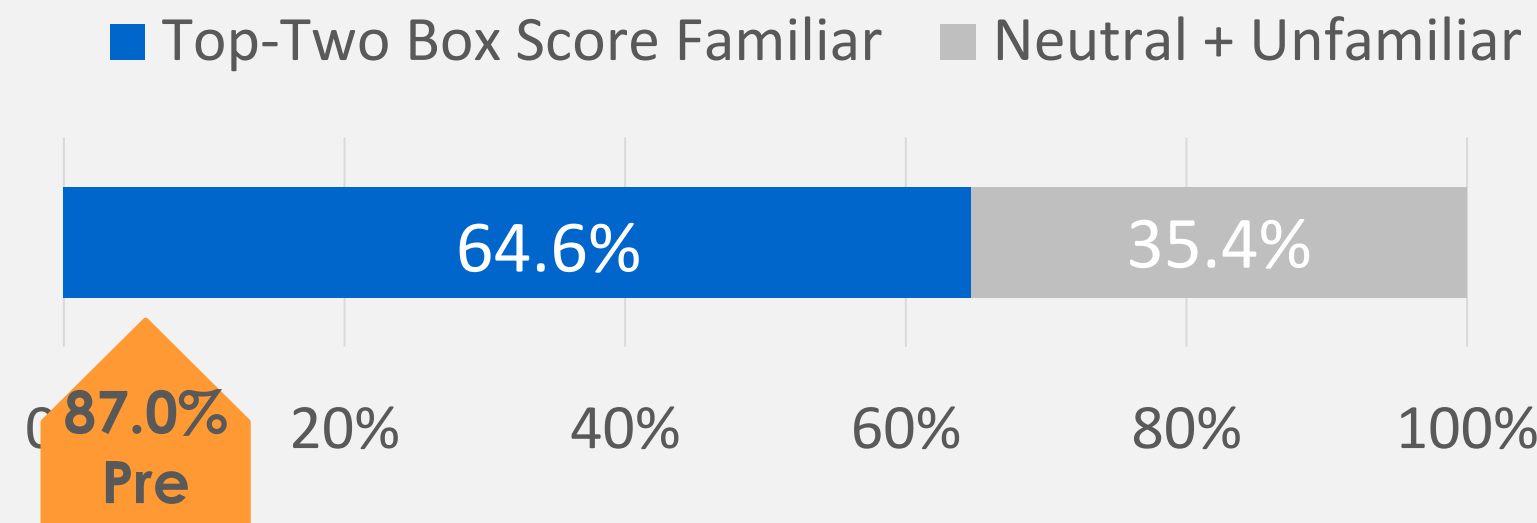
## Ads' Affect on Likelihood to Visit MD



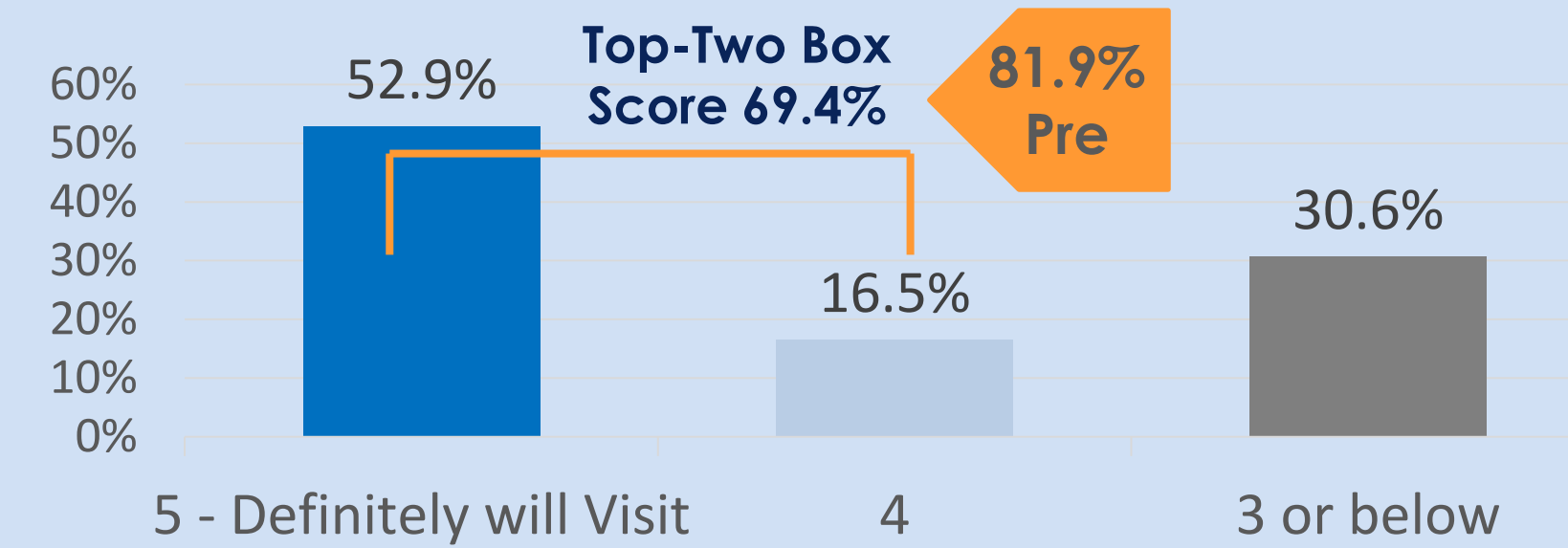


# DISTRICT OF COLUMBIA

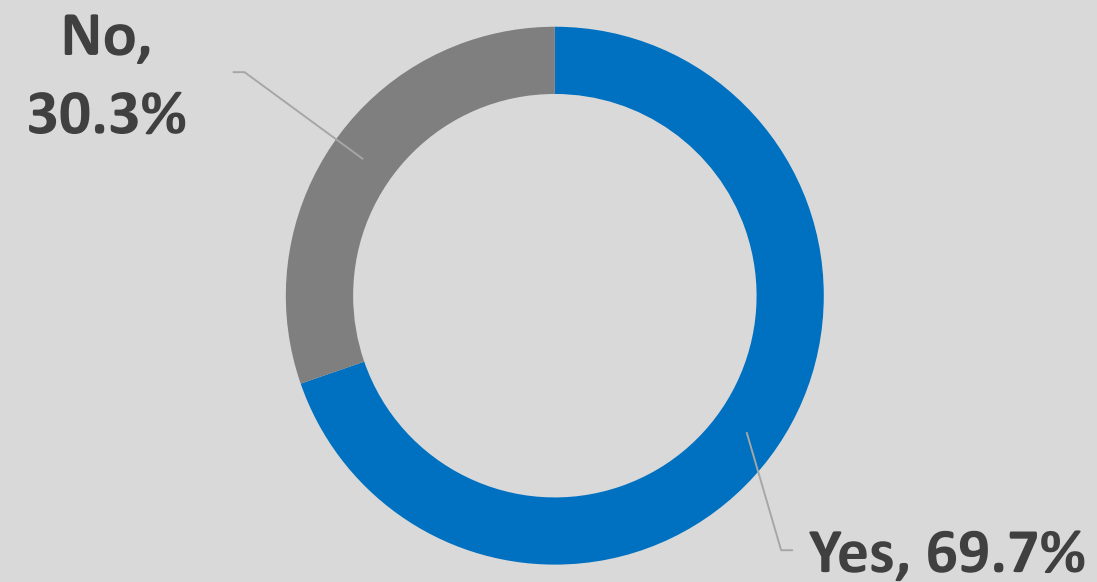
## Familiarity With Maryland



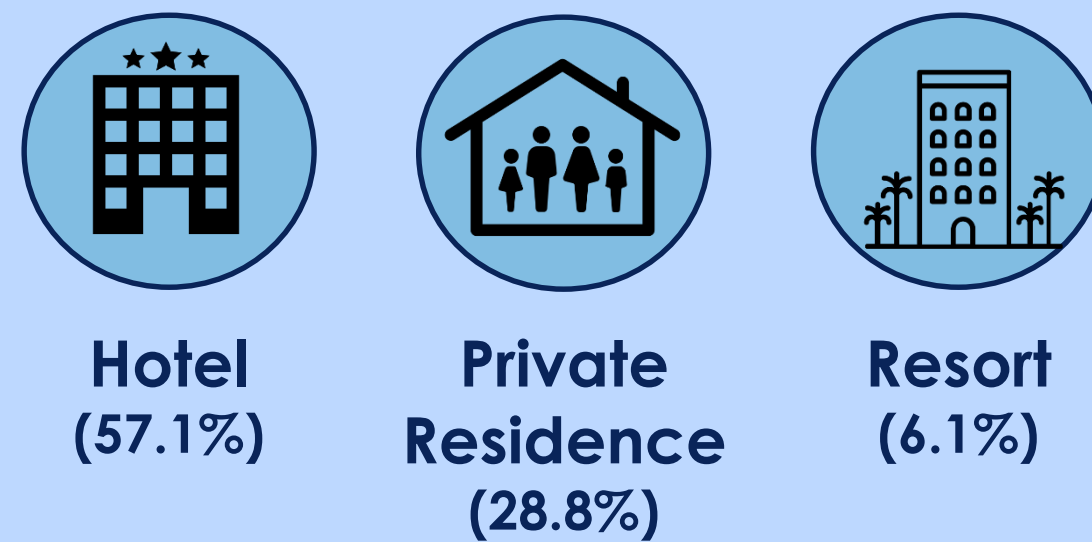
## Likelihood to Visit MD (Next 12 Months)



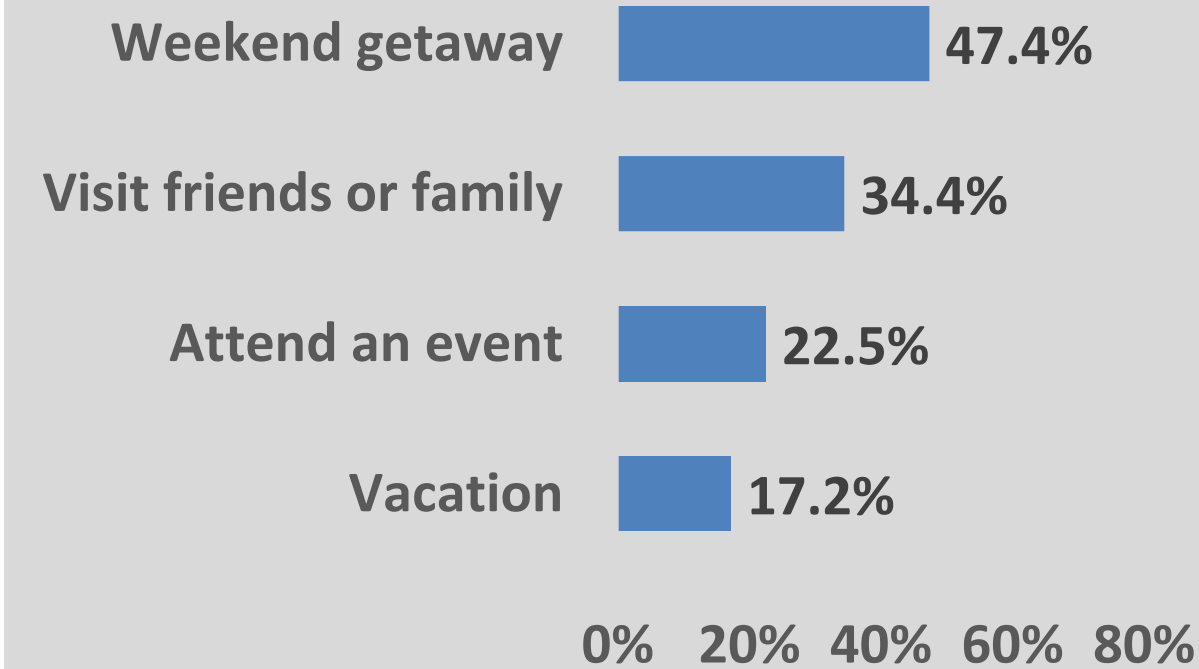
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



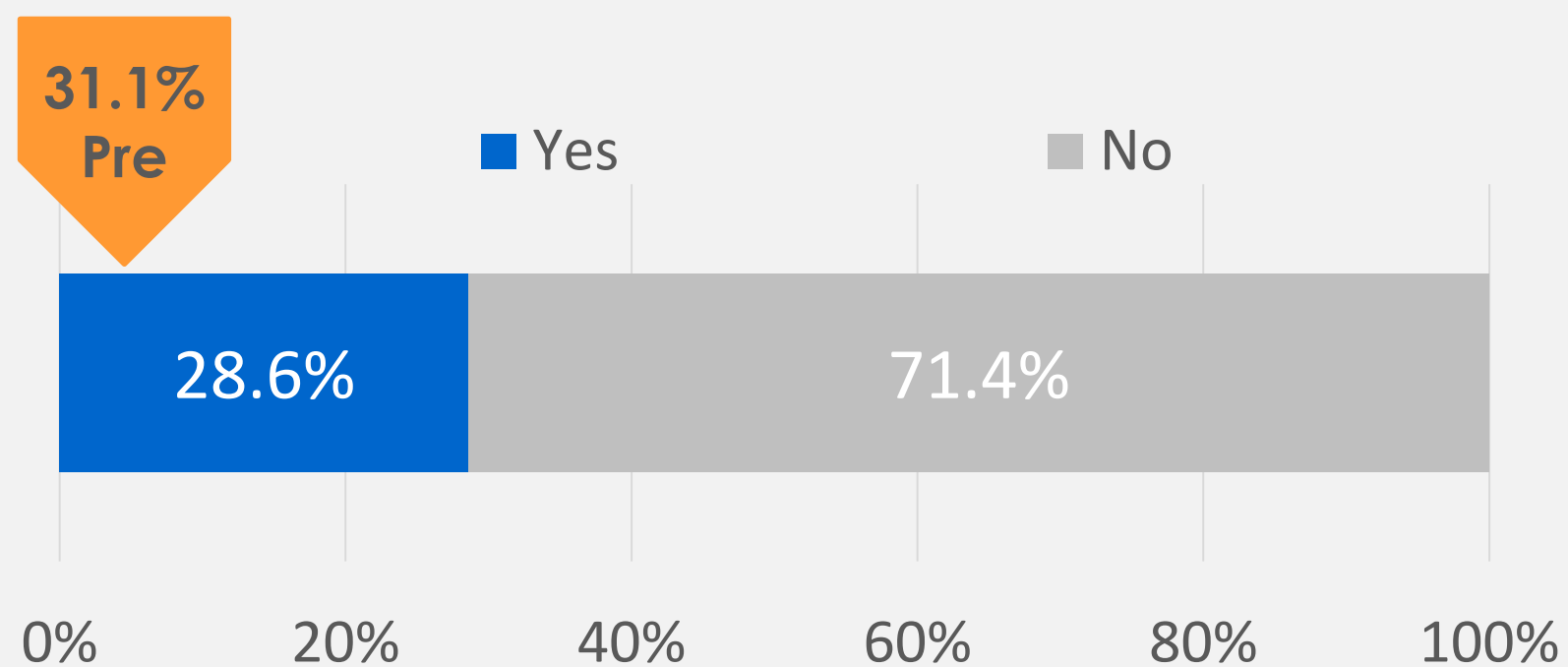
## Top Reasons for Visiting



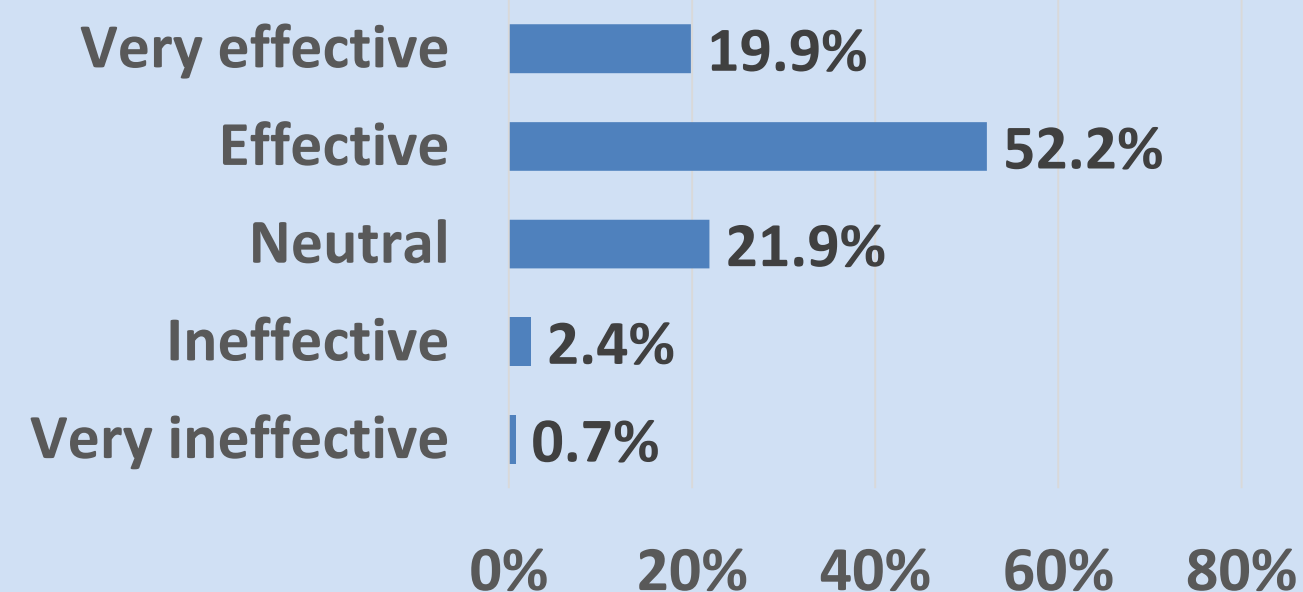
## Total In-Market Spend



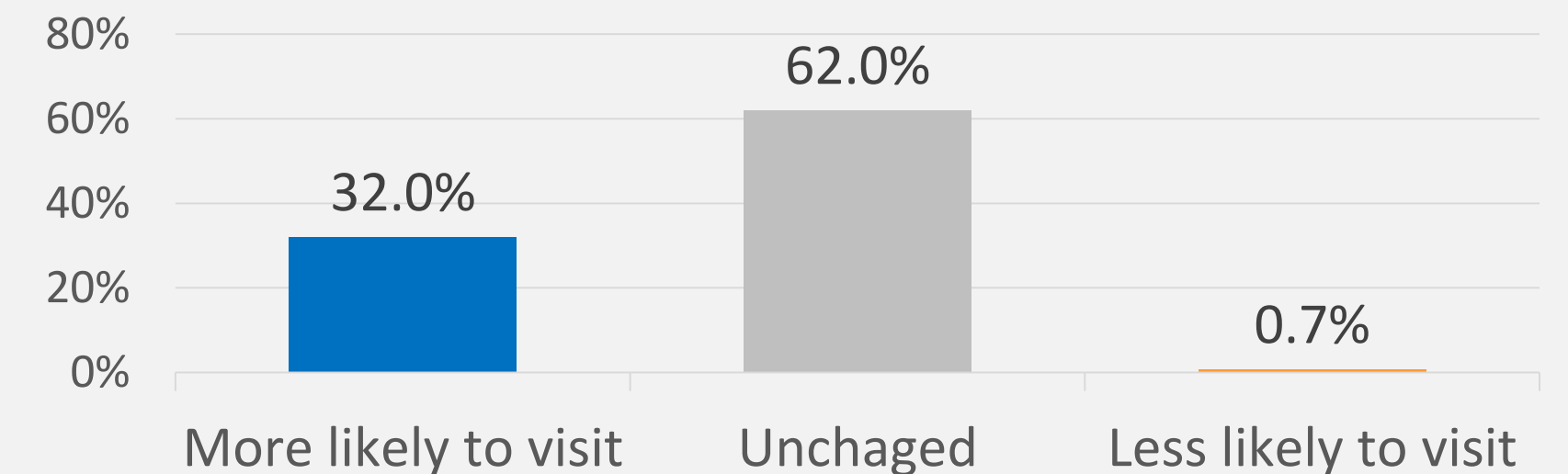
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



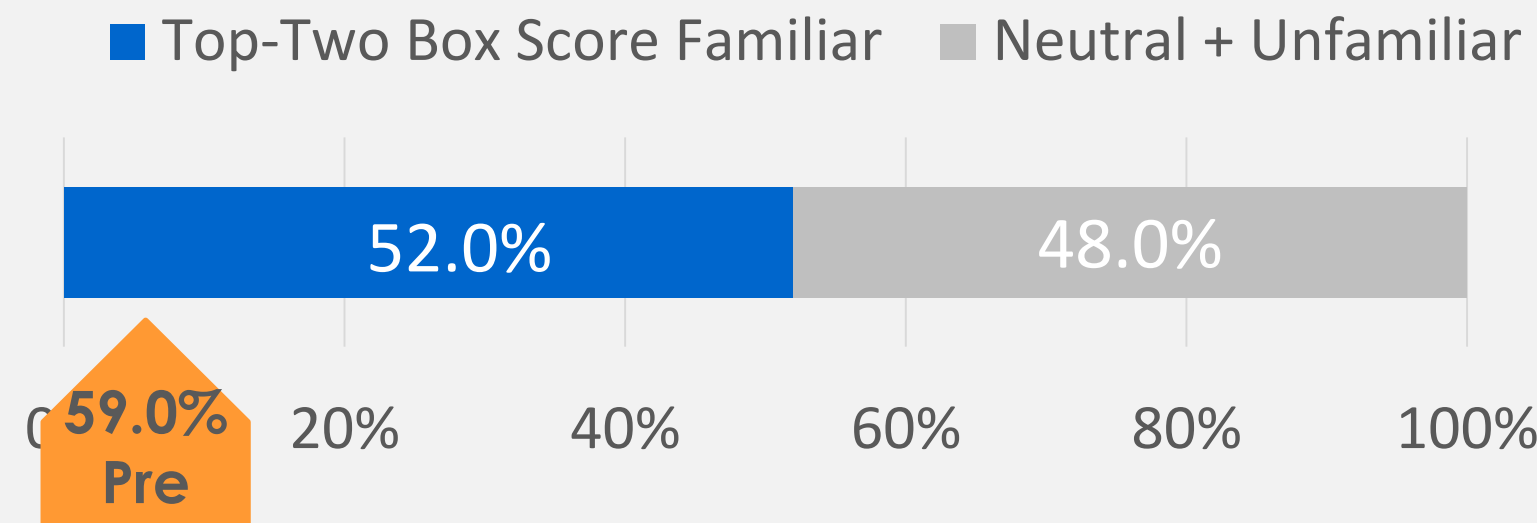
## Ads' Affect on Likelihood to Visit MD



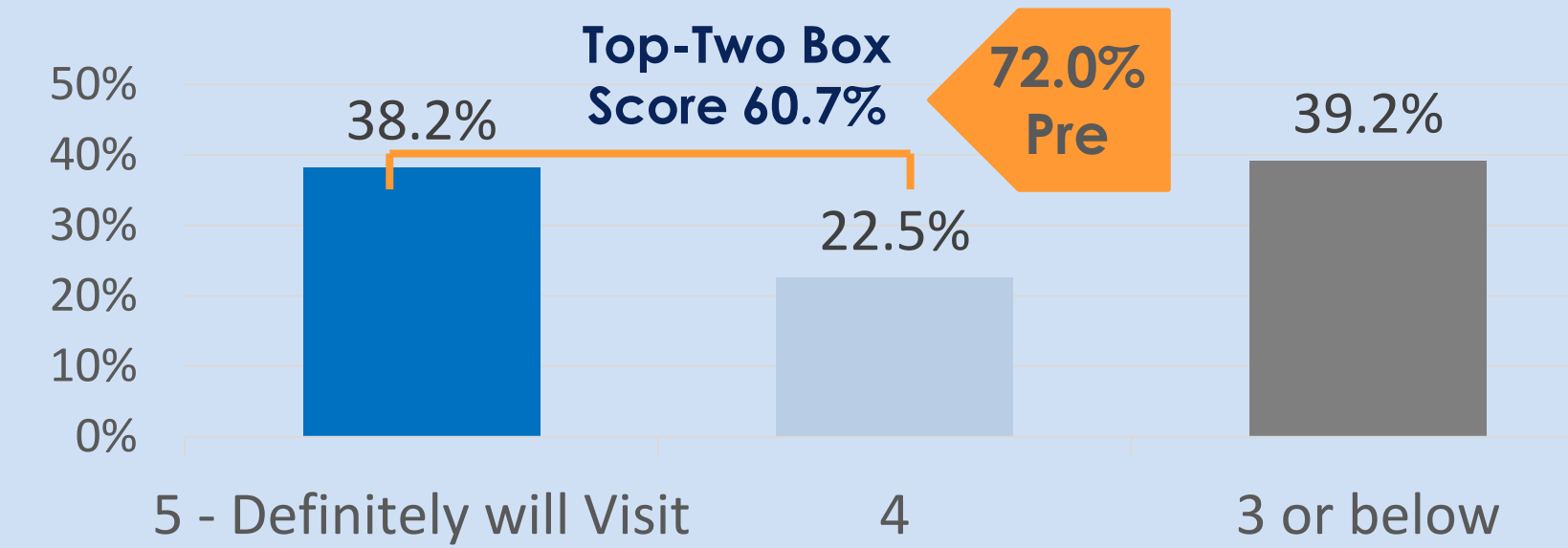


# HARRISBURG/ LANCASTER

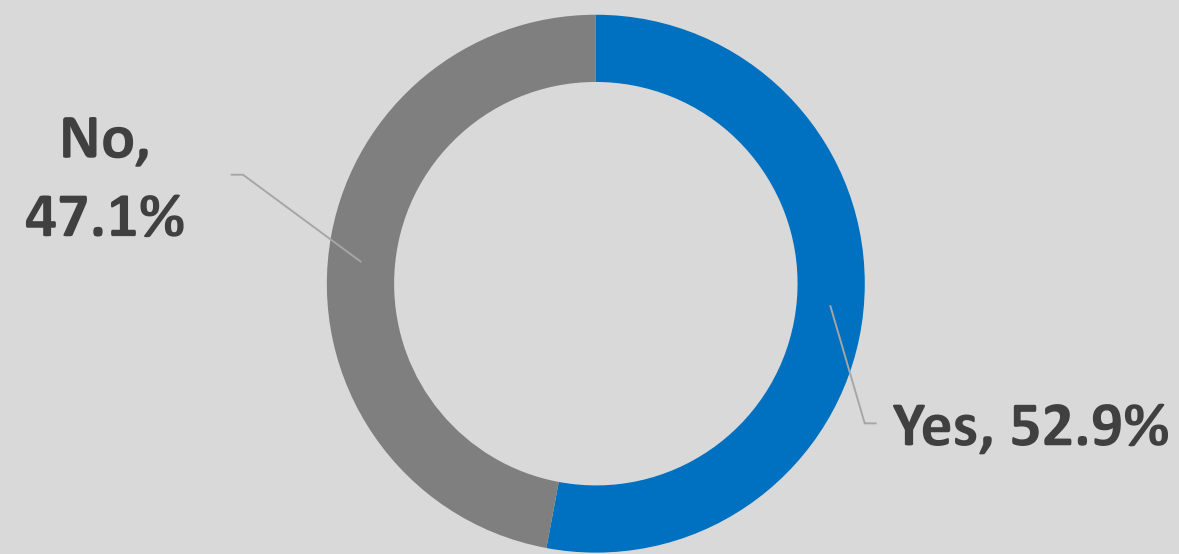
## Familiarity With Maryland



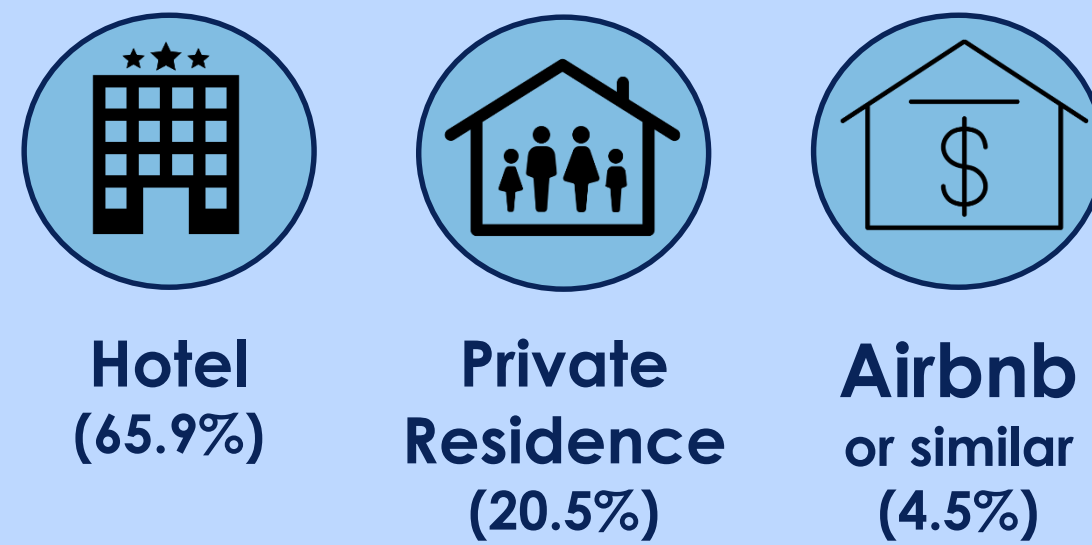
## Likelihood to Visit MD (Next 12 Months)



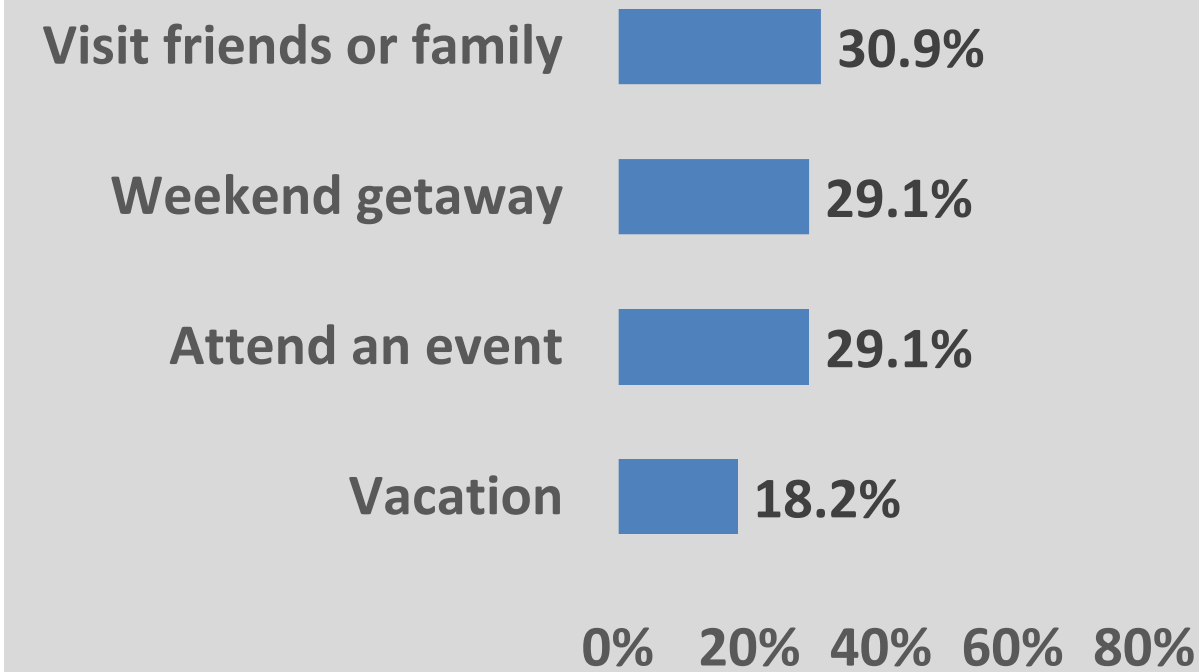
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



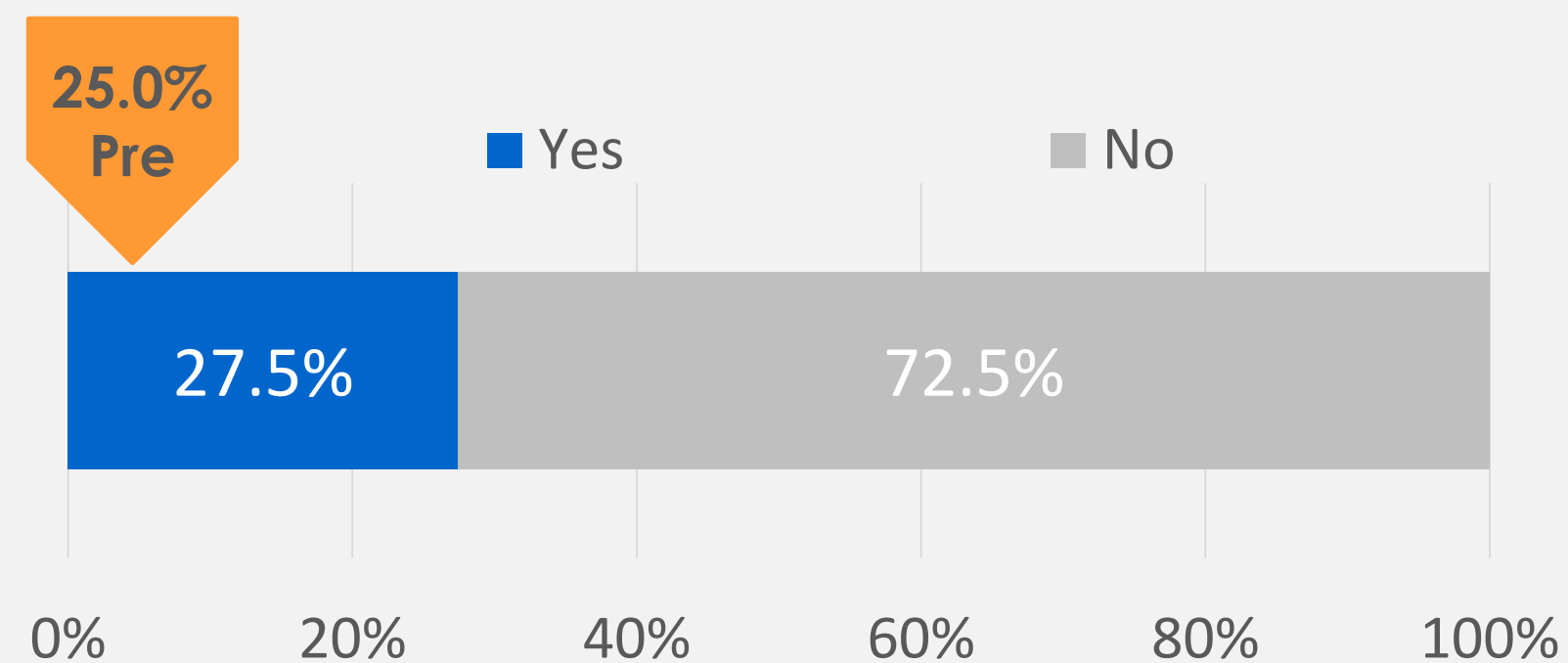
## Top Reasons for Visiting



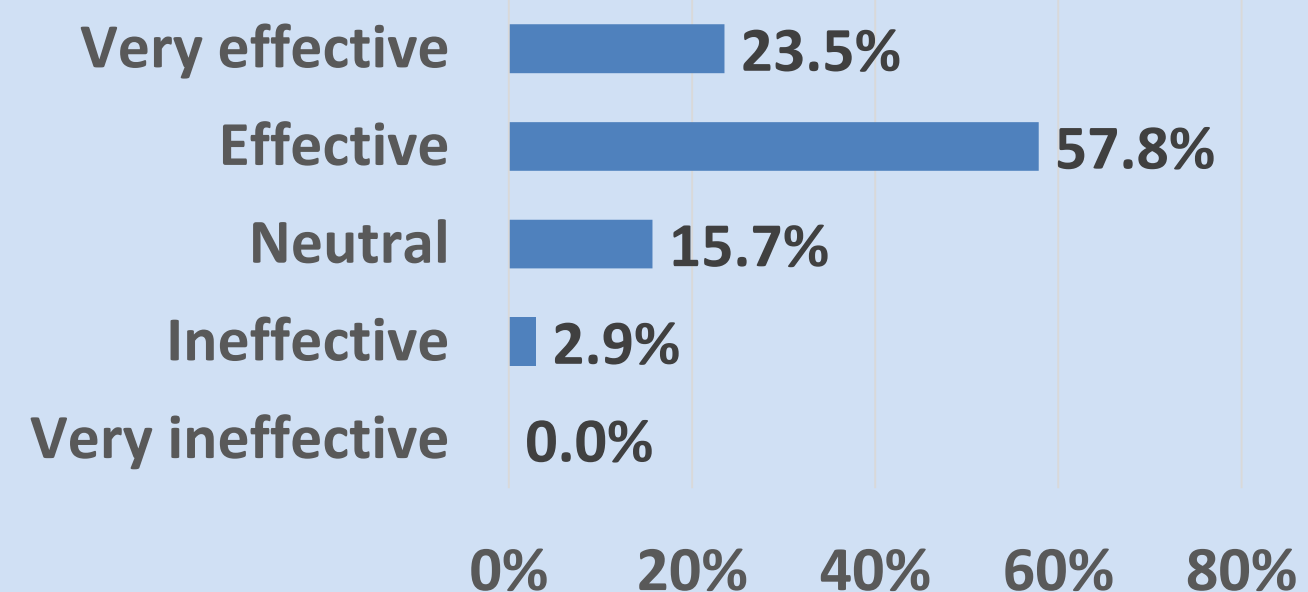
## Total In-Market Spend



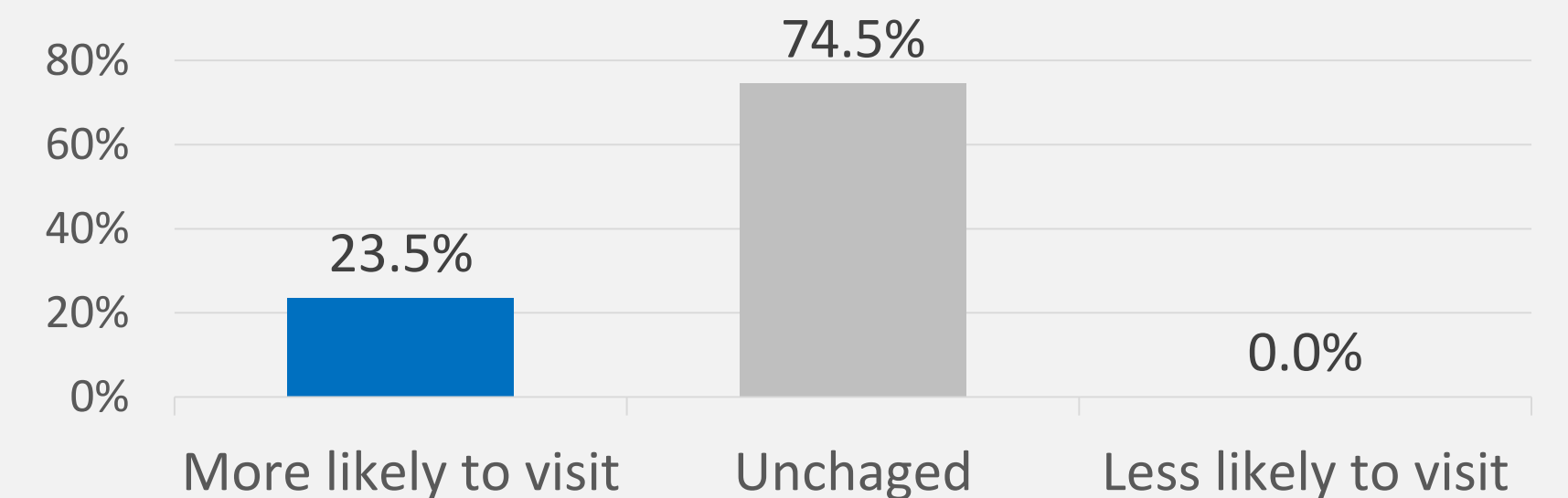
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



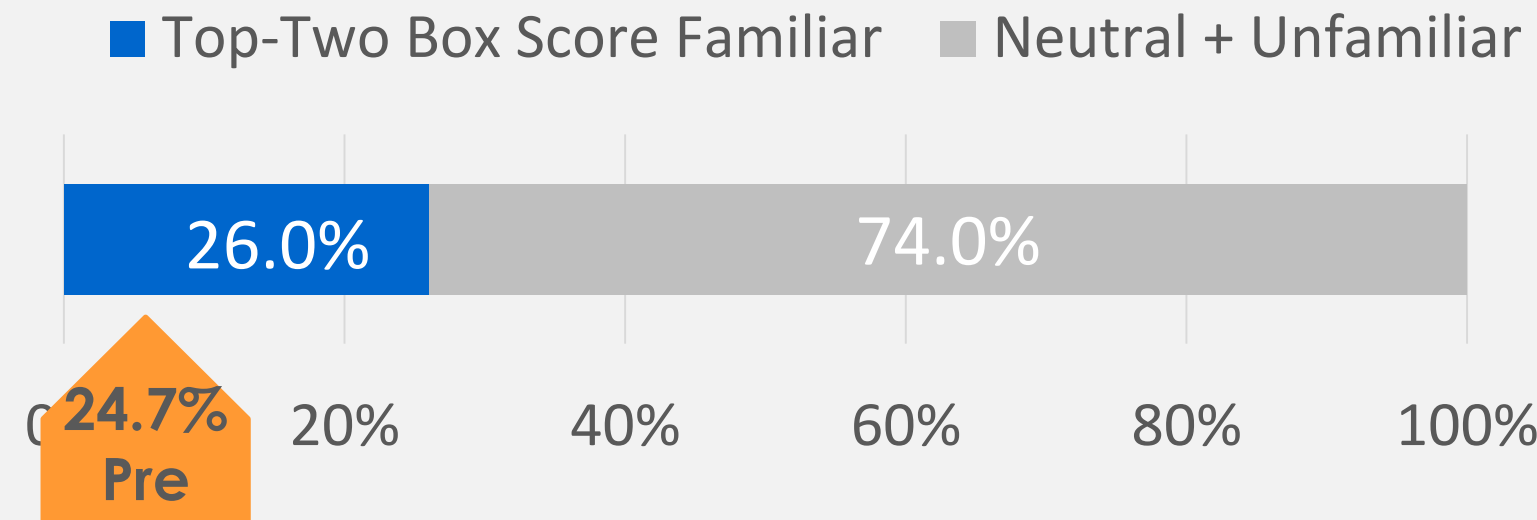
## Ads' Affect on Likelihood to Visit MD



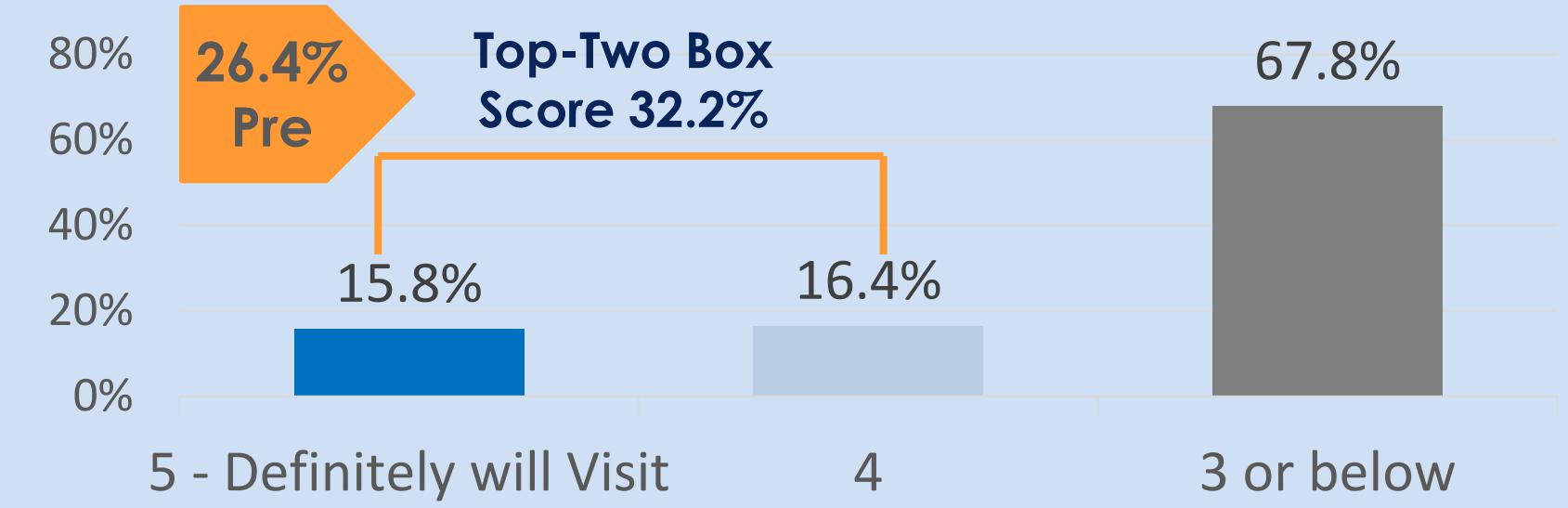


# NEW YORK

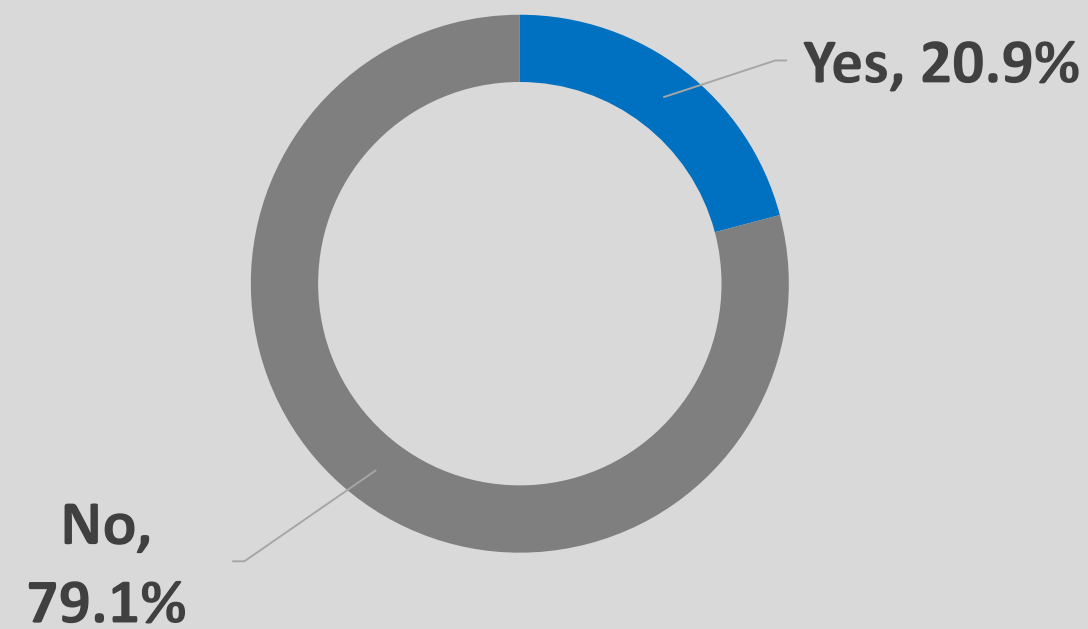
## Familiarity With Maryland



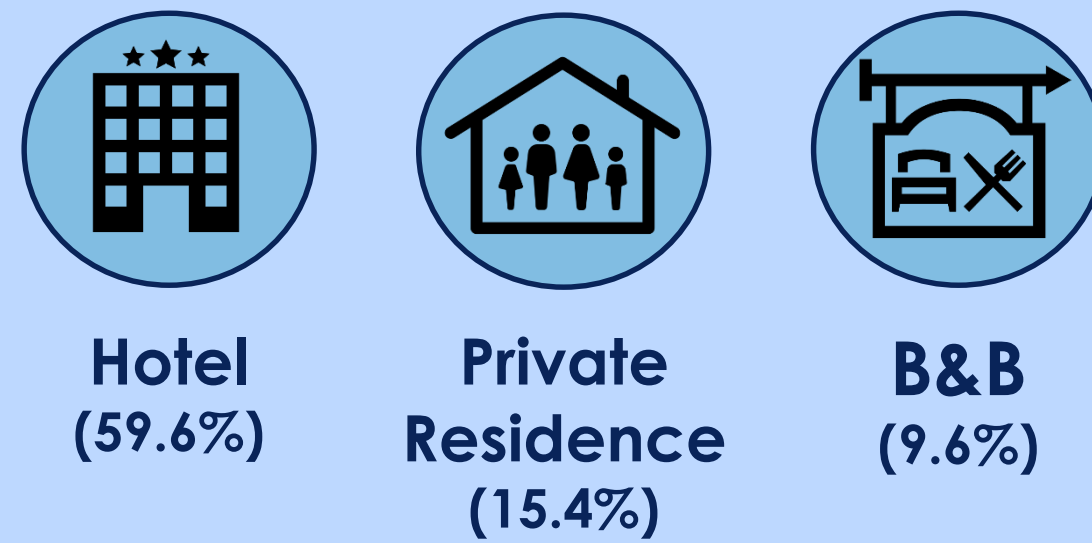
## Likelihood to Visit MD (Next 12 Months)



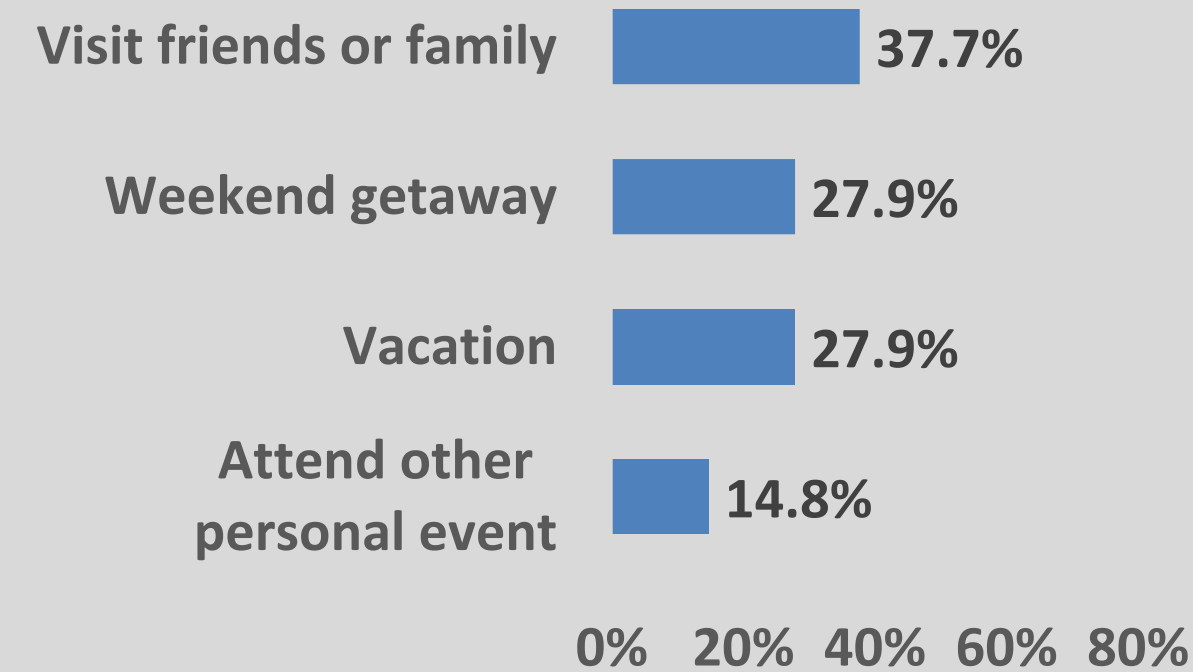
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



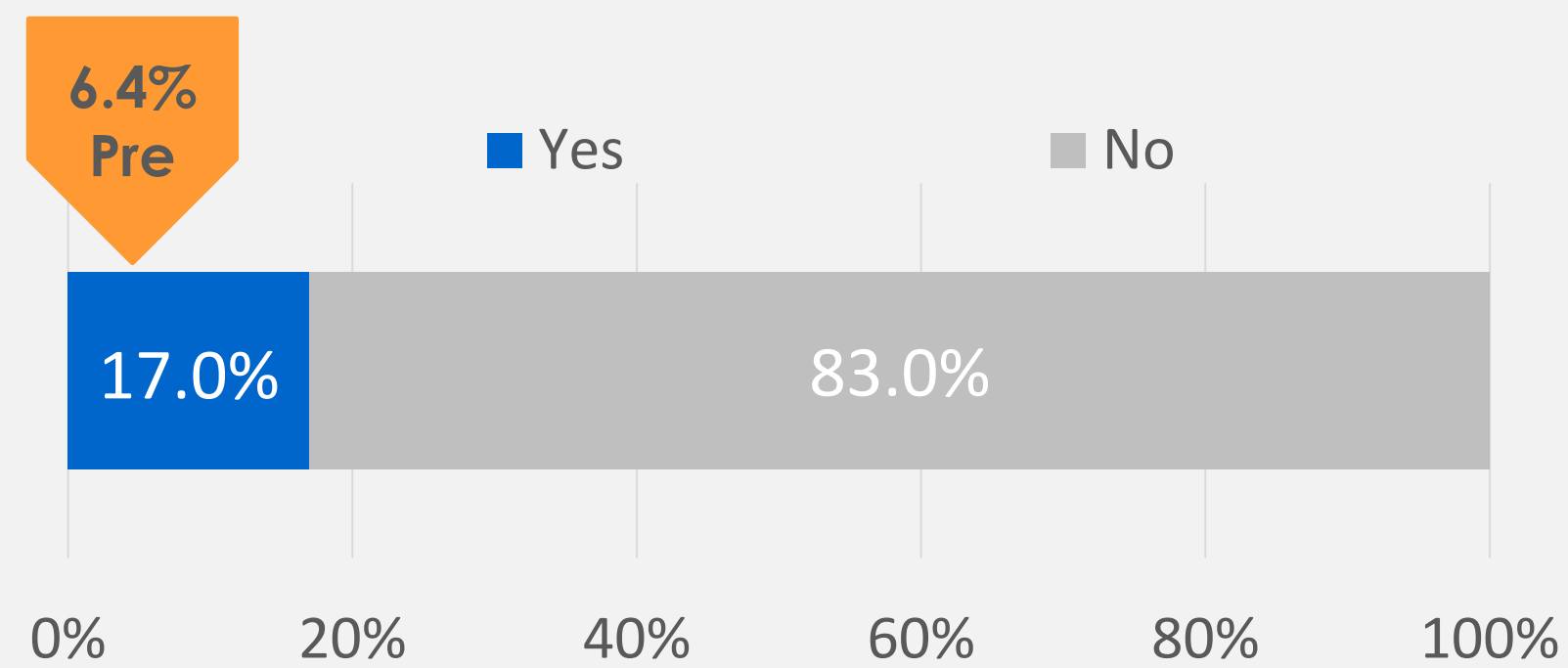
## Top Reasons for Visiting



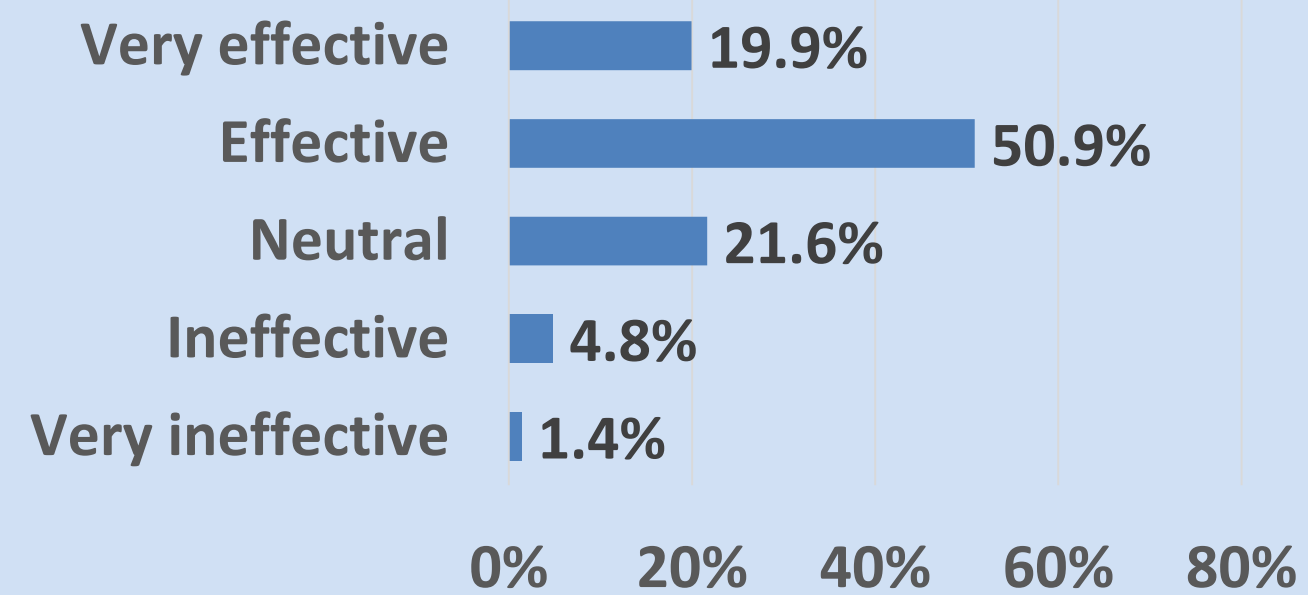
## Total In-Market Spend



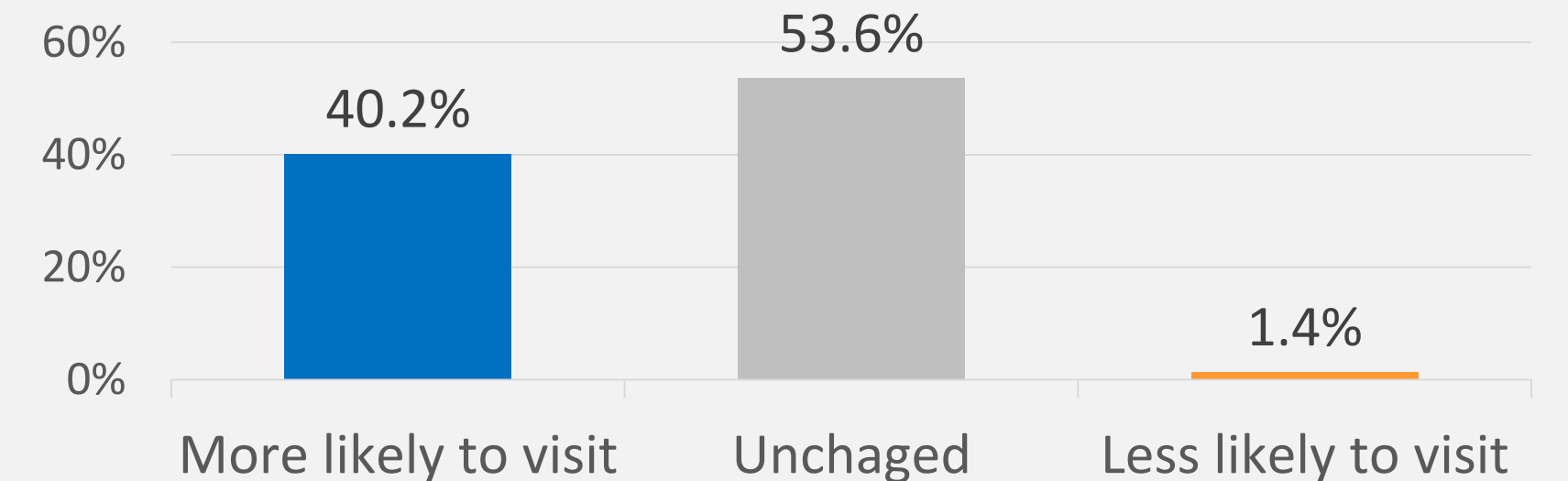
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



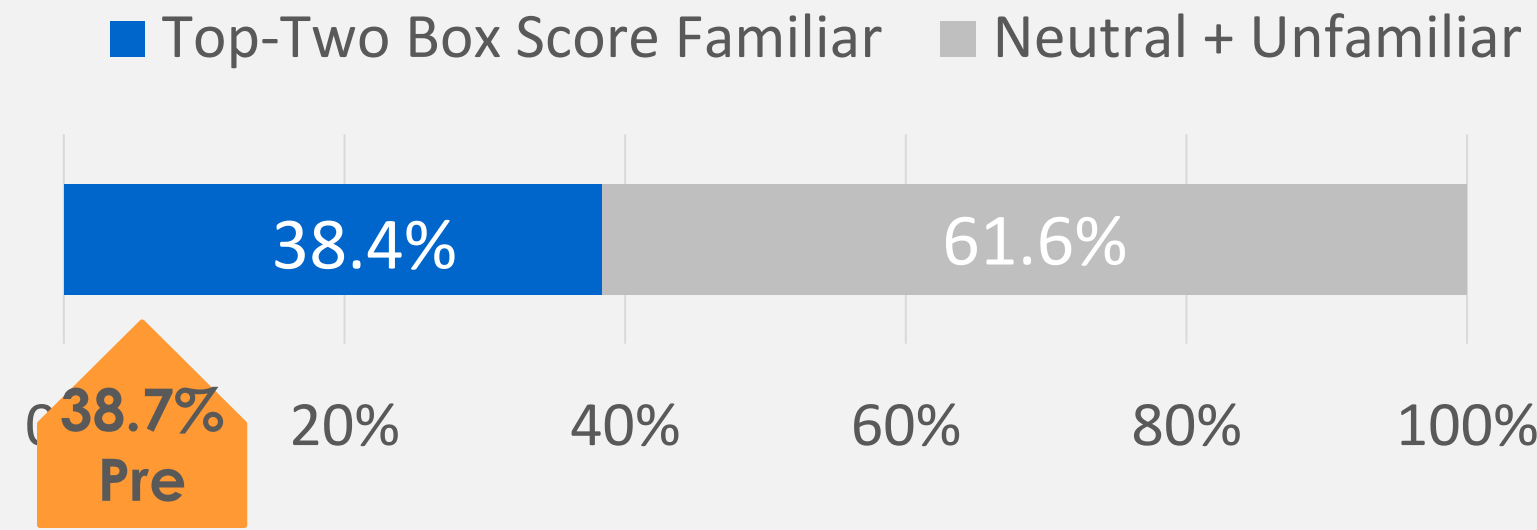
## Ads' Affect on Likelihood to Visit MD



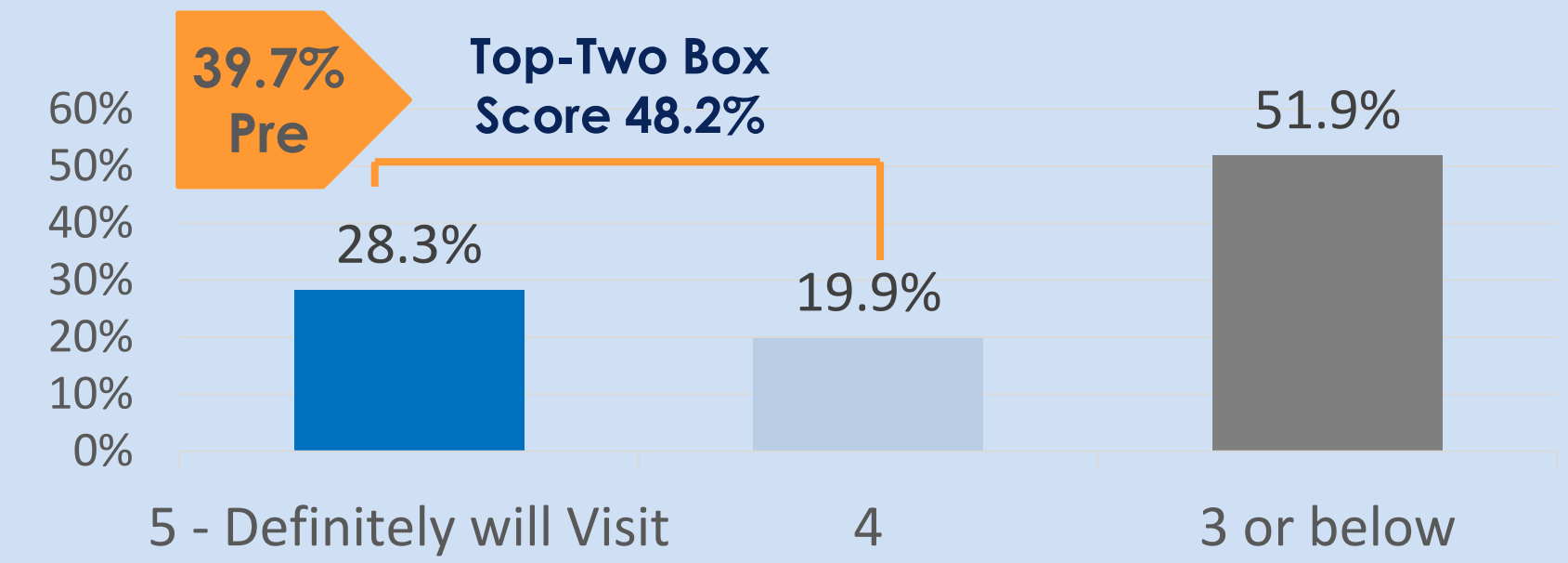


# PHILADELPHIA

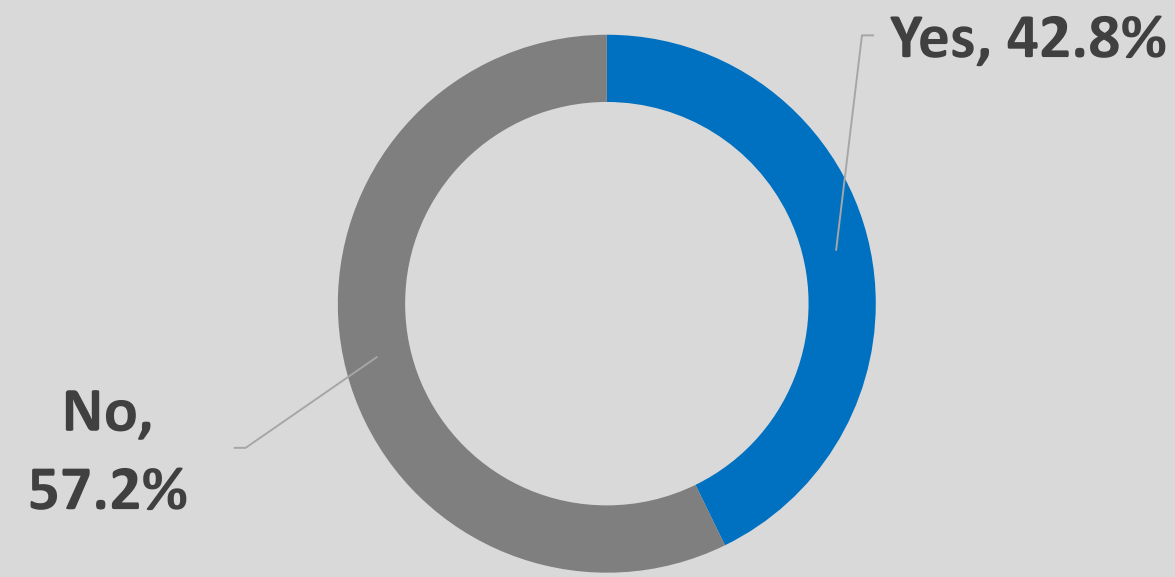
## Familiarity With Maryland



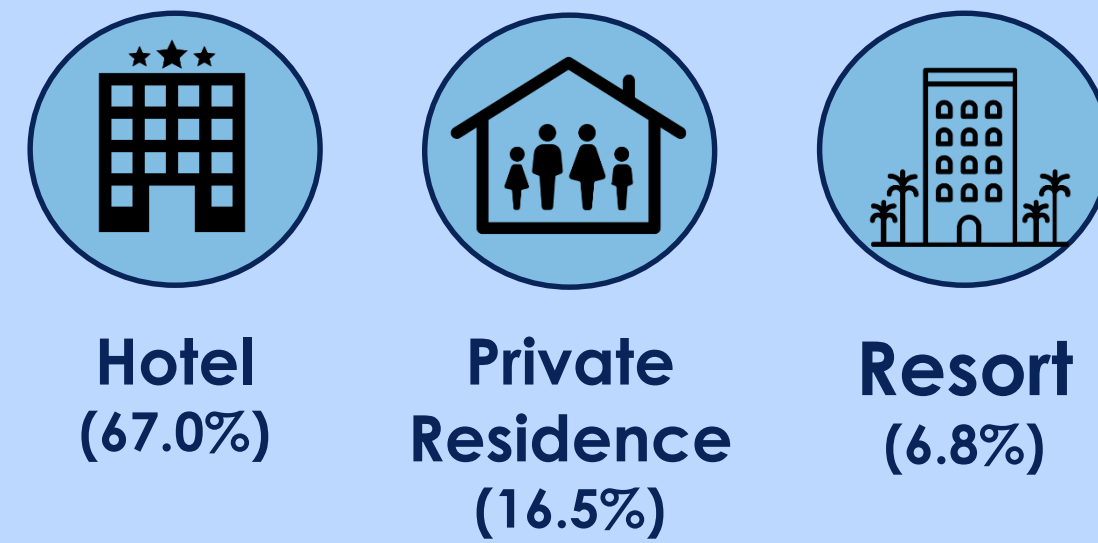
## Likelihood to Visit MD (Next 12 Months)



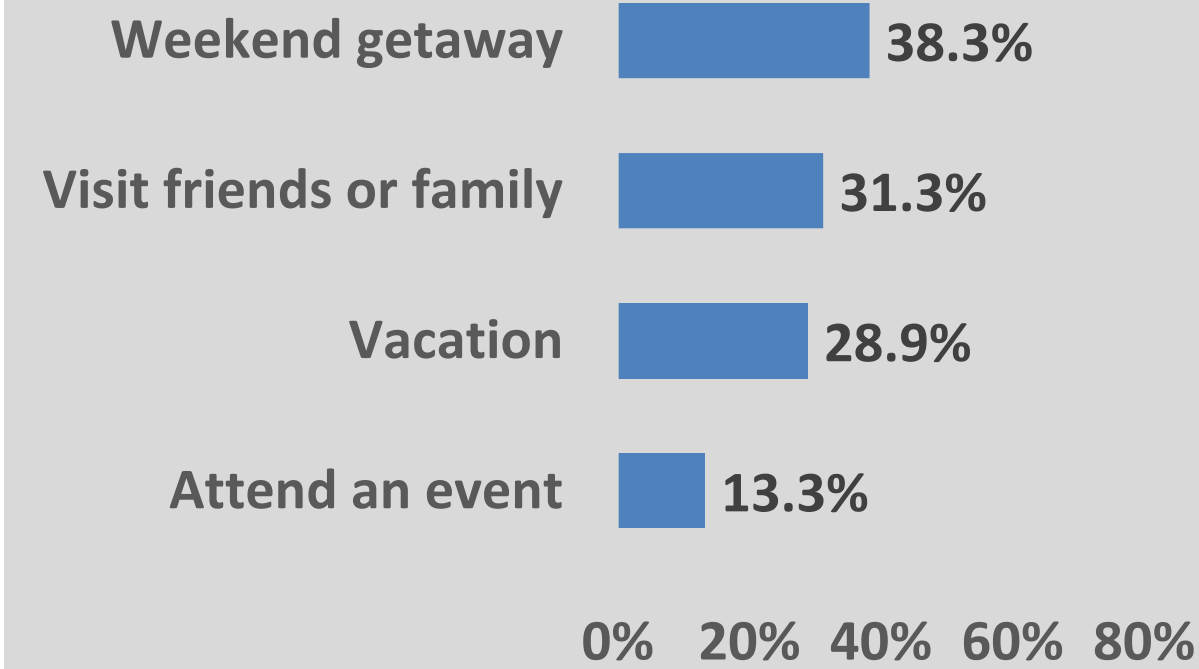
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



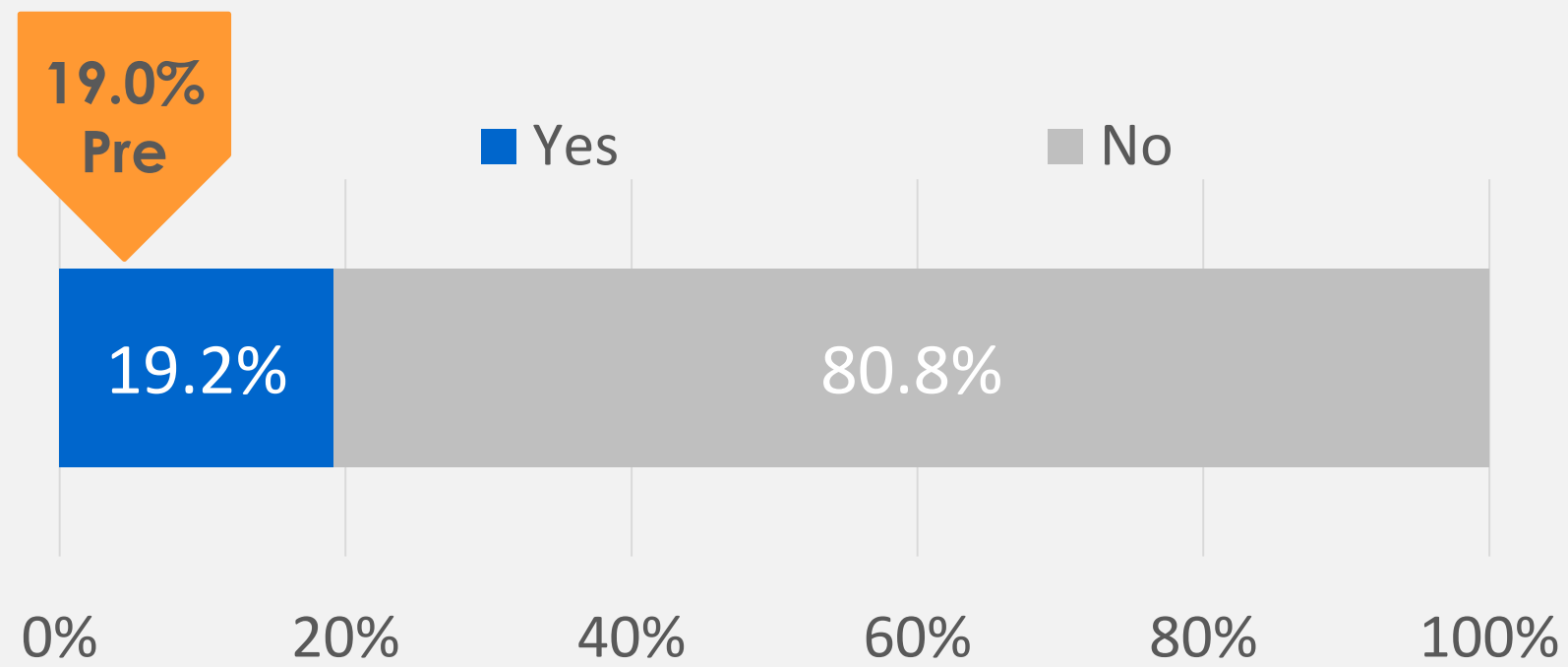
## Top Reasons for Visiting



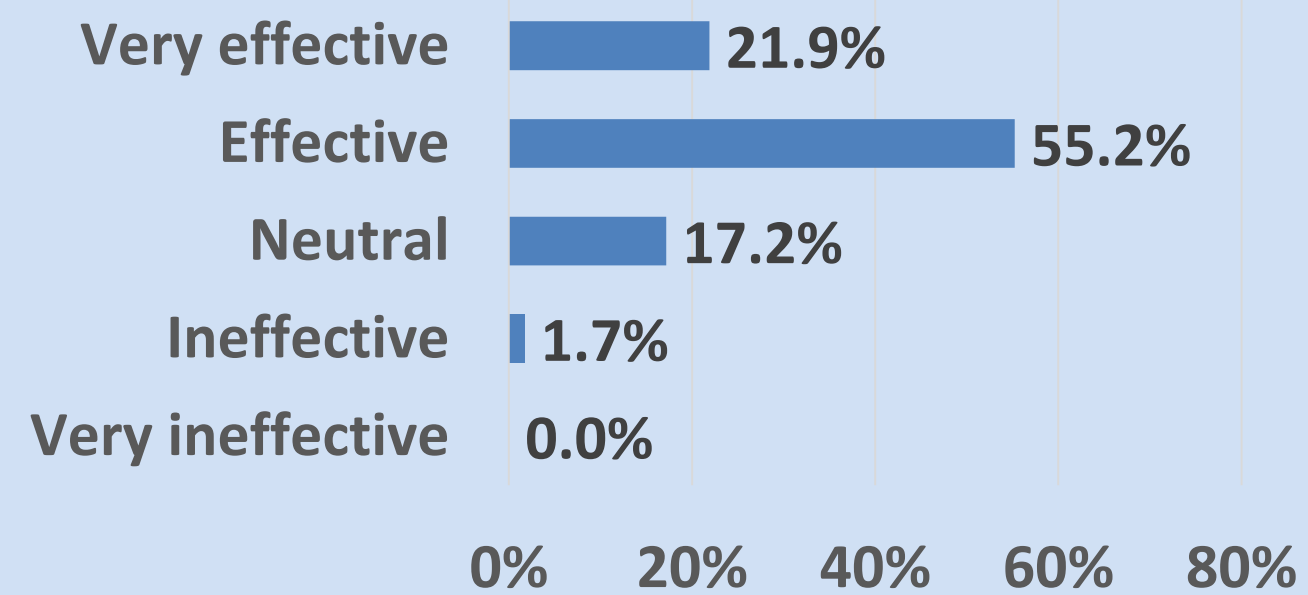
## Total In-Market Spend



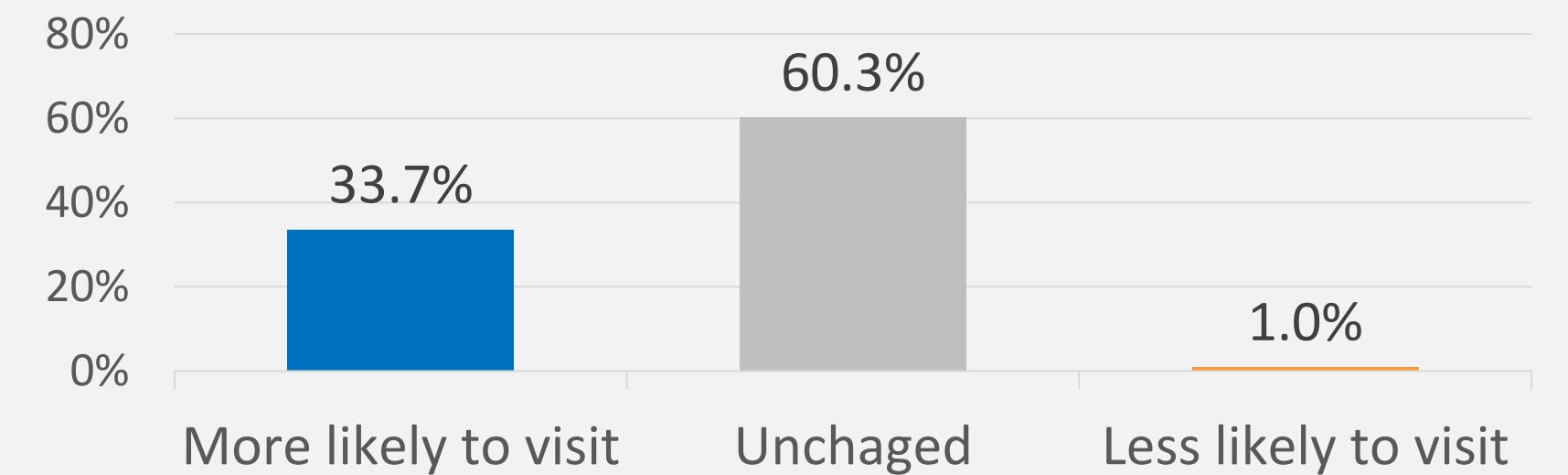
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



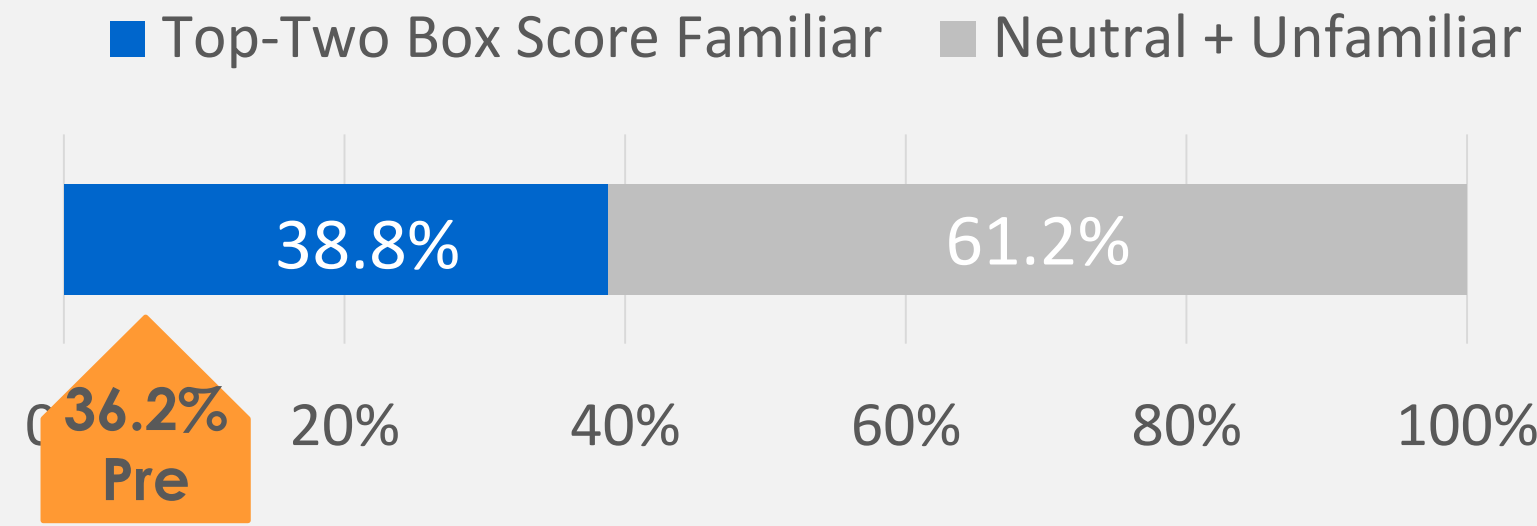
## Ads' Affect on Likelihood to Visit MD



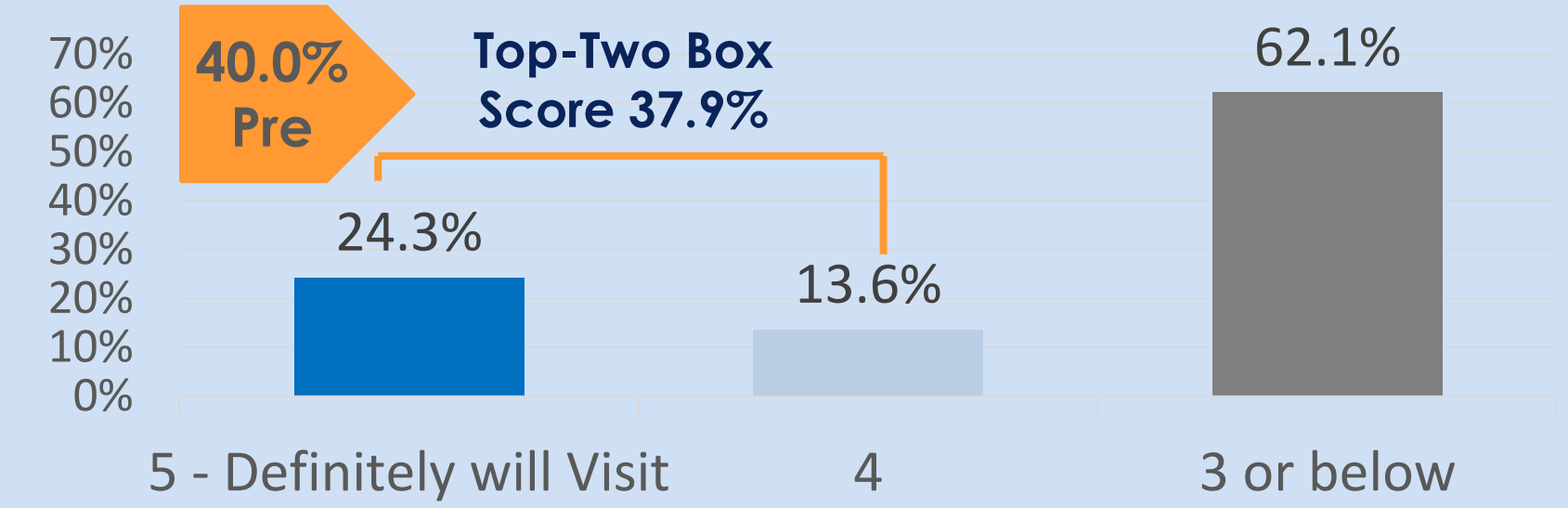


# PITTSBURGH

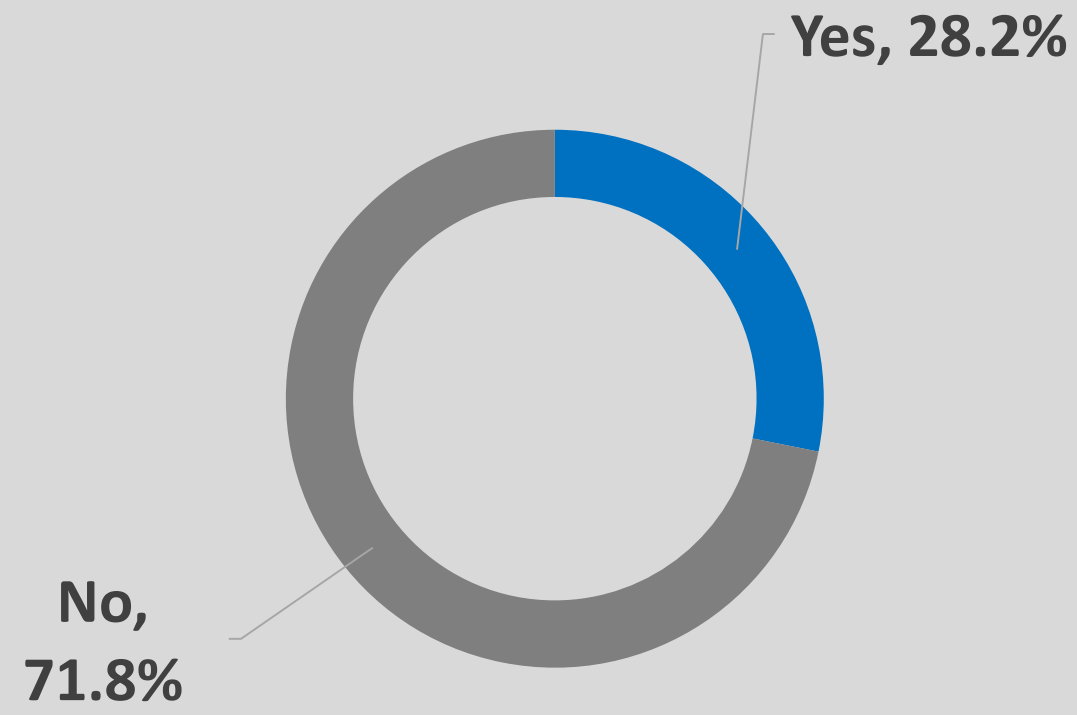
## Familiarity With Maryland



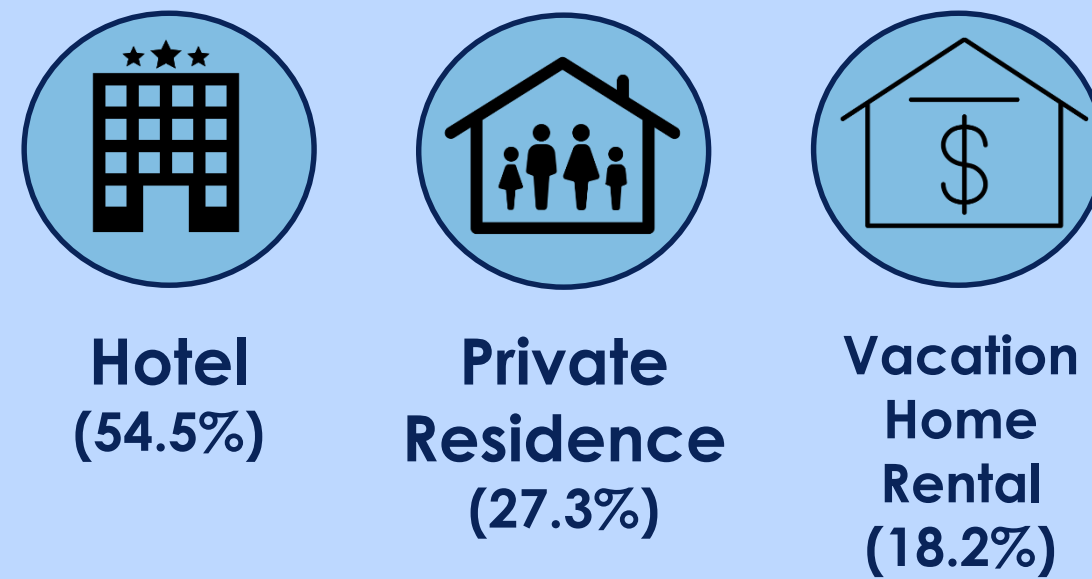
## Likelihood to Visit MD (Next 12 Months)



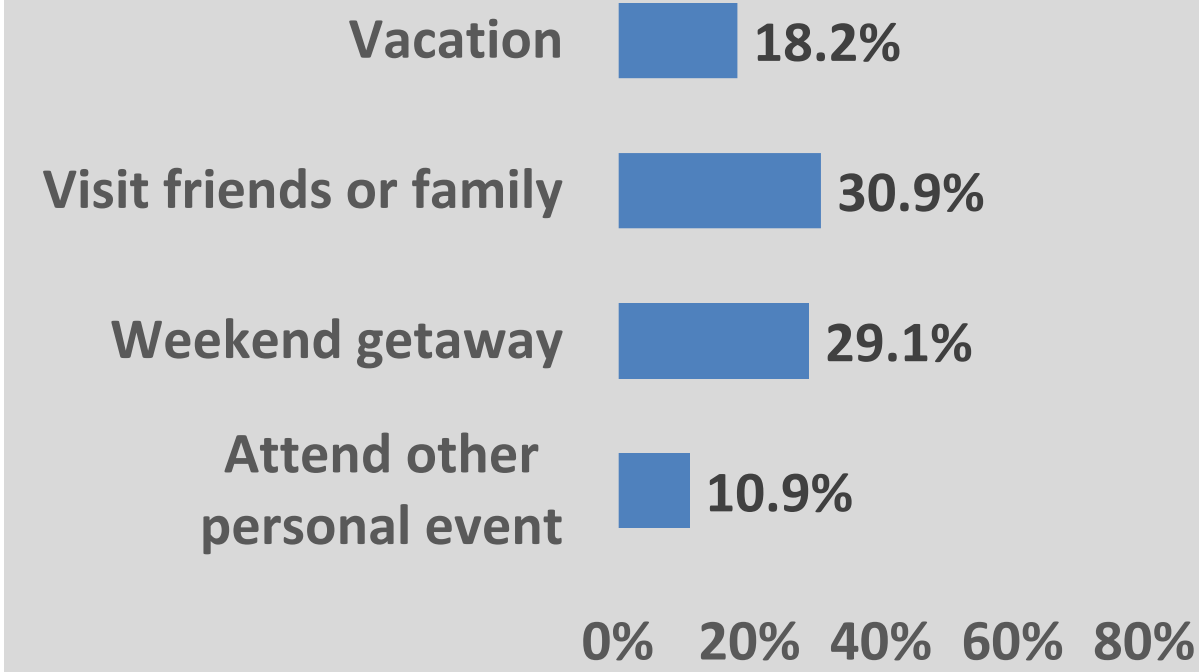
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



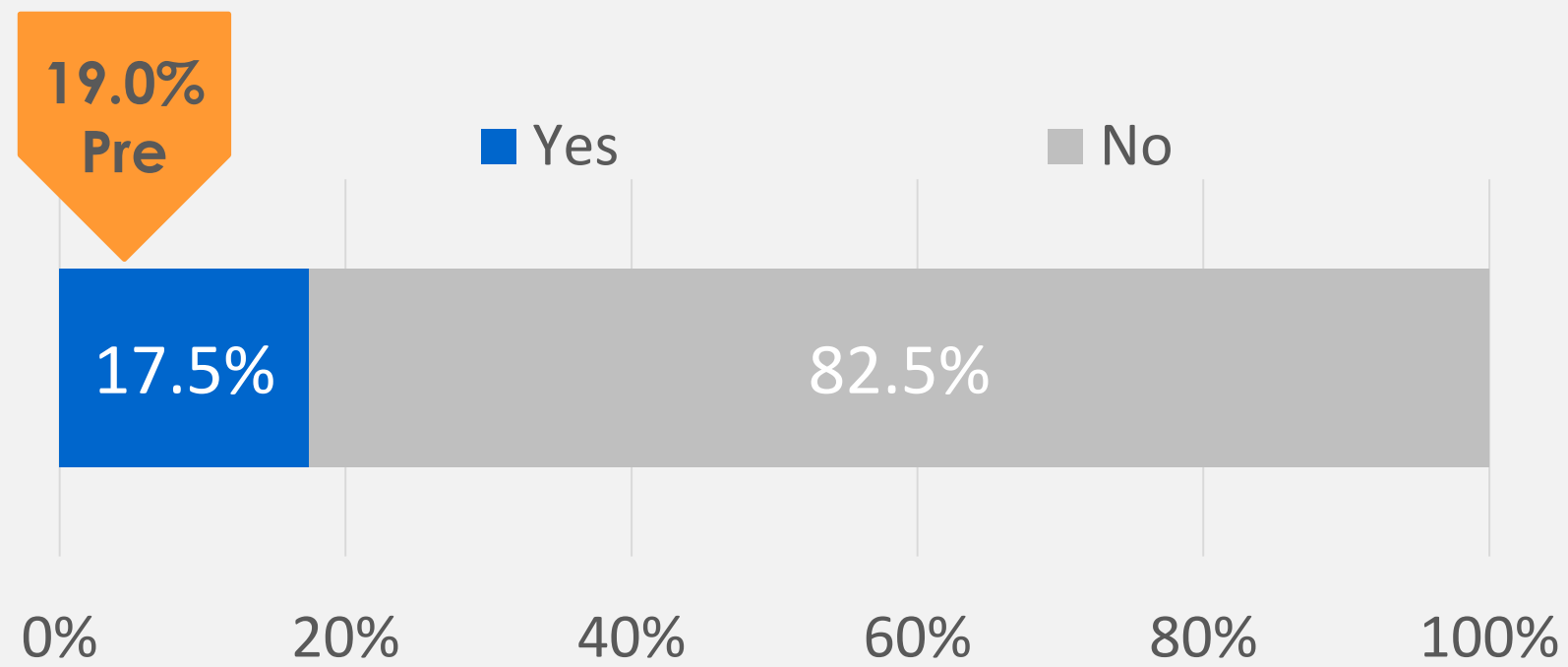
## Top Reasons for Visiting



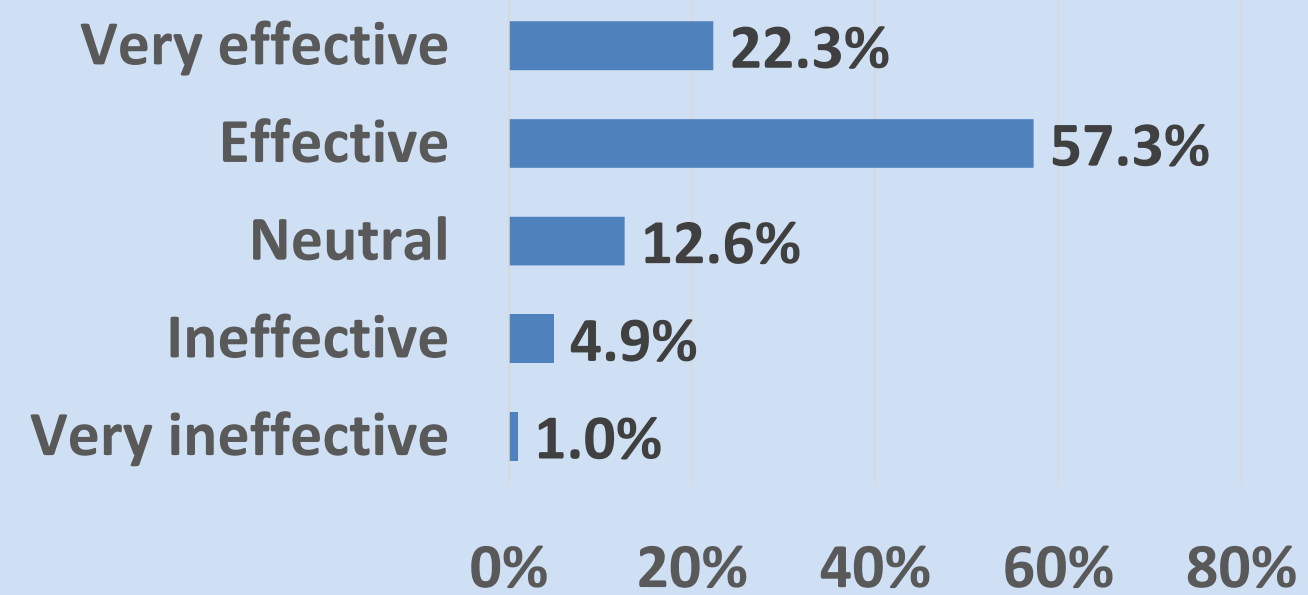
## Total In-Market Spend



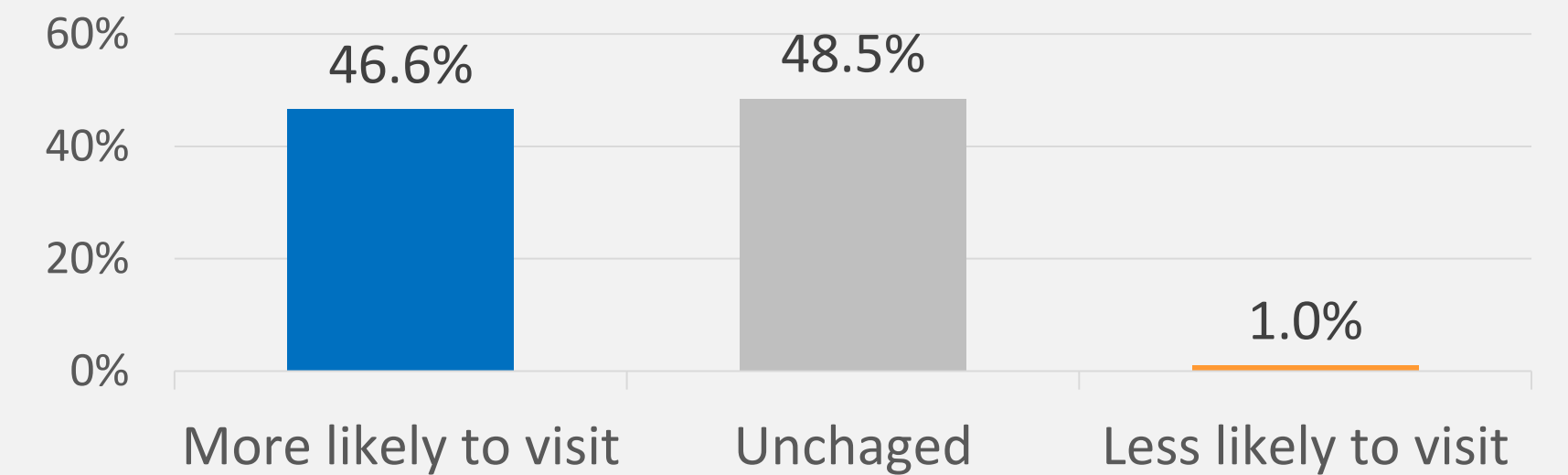
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



## Ads' Affect on Likelihood to Visit MD





An aerial photograph of a waterfront community. In the foreground, there are several houses with various roof colors (green, brown, blue) and white siding. A large body of water, likely a lake or bay, occupies the middle ground, with a marina filled with numerous boats and yachts. To the left, a golf course is visible with its green fairways and trees. The background shows a dense line of trees and a hazy horizon under a cloudy sky. The entire image is overlaid with a semi-transparent white filter.

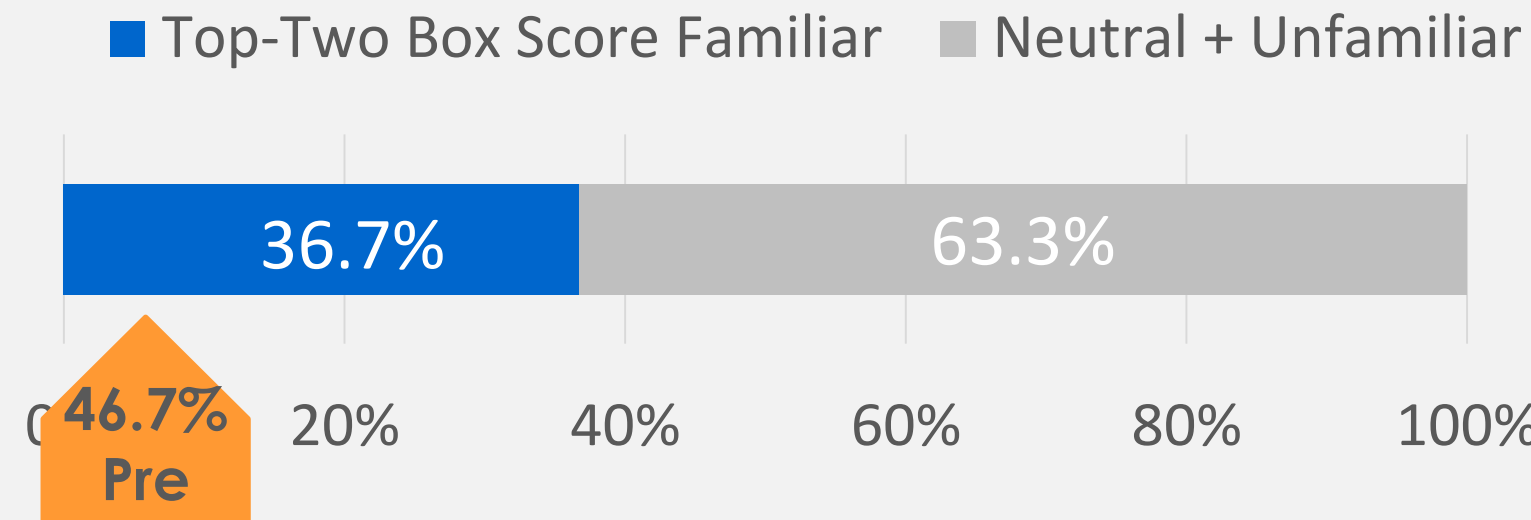
# SEGMENT SUMMARIES BY GENERATION



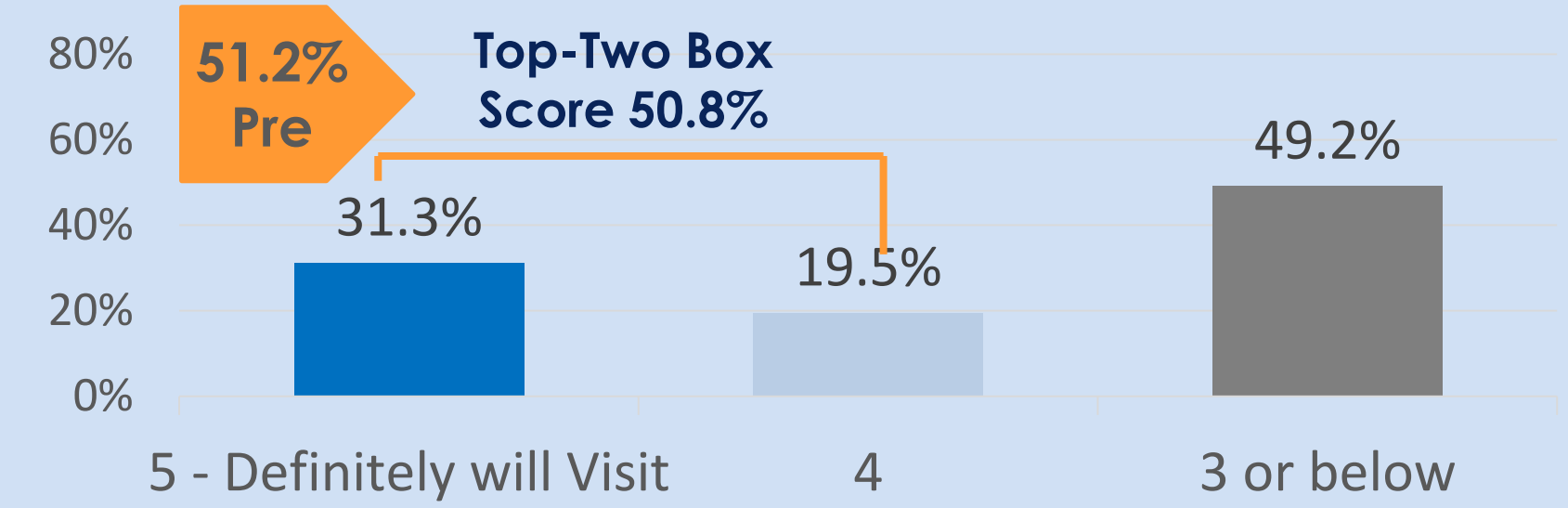
# YOUNGER MILLENNIAL

(Travelers aged 25-31 years old)

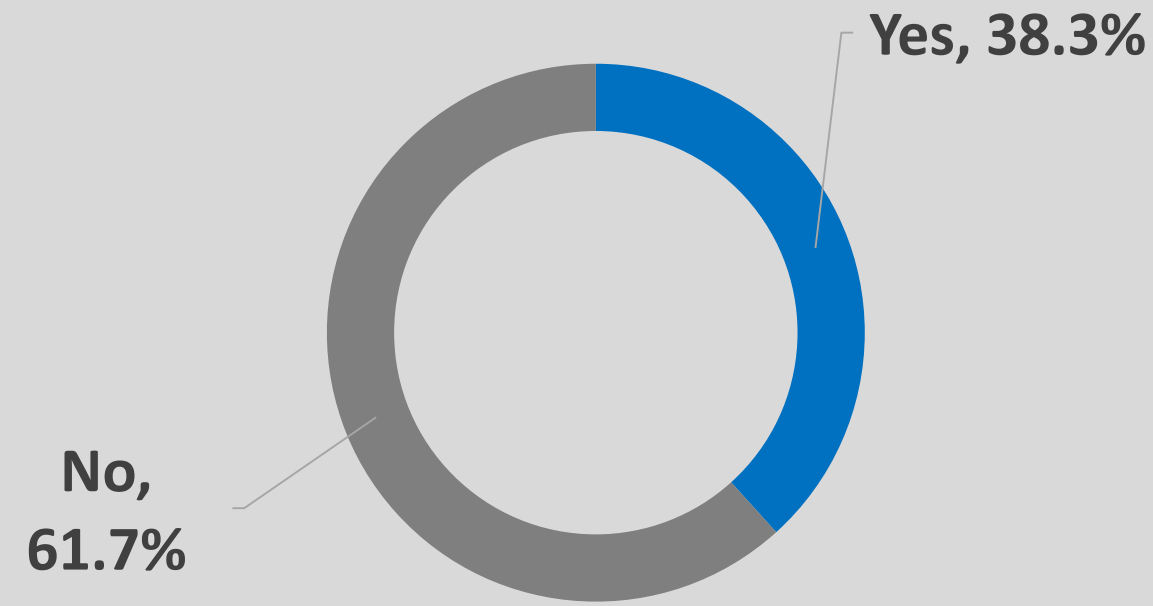
## Familiarity With Maryland



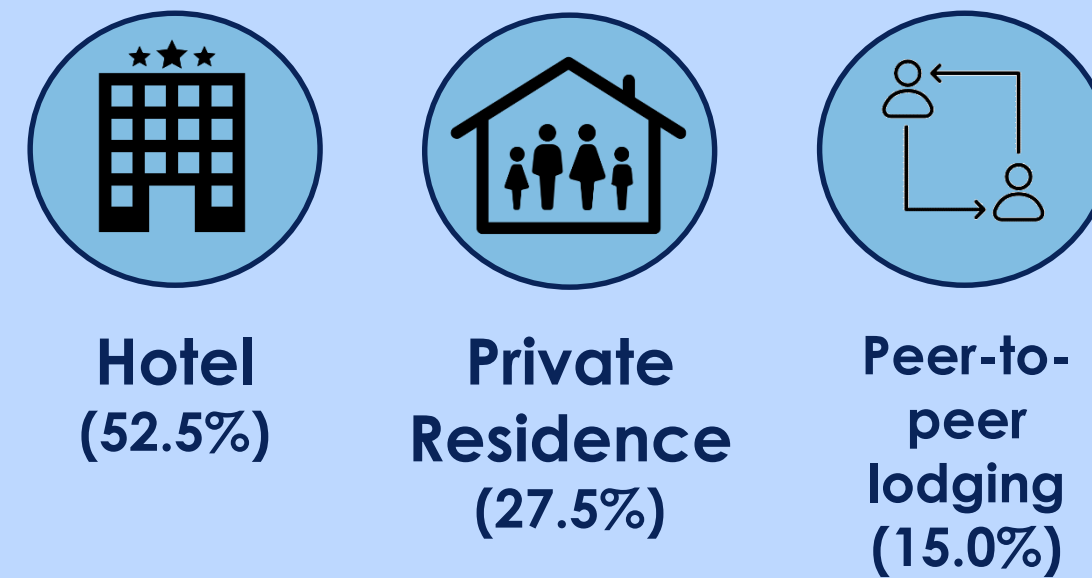
## Likelihood to Visit MD (Next 12 Months)



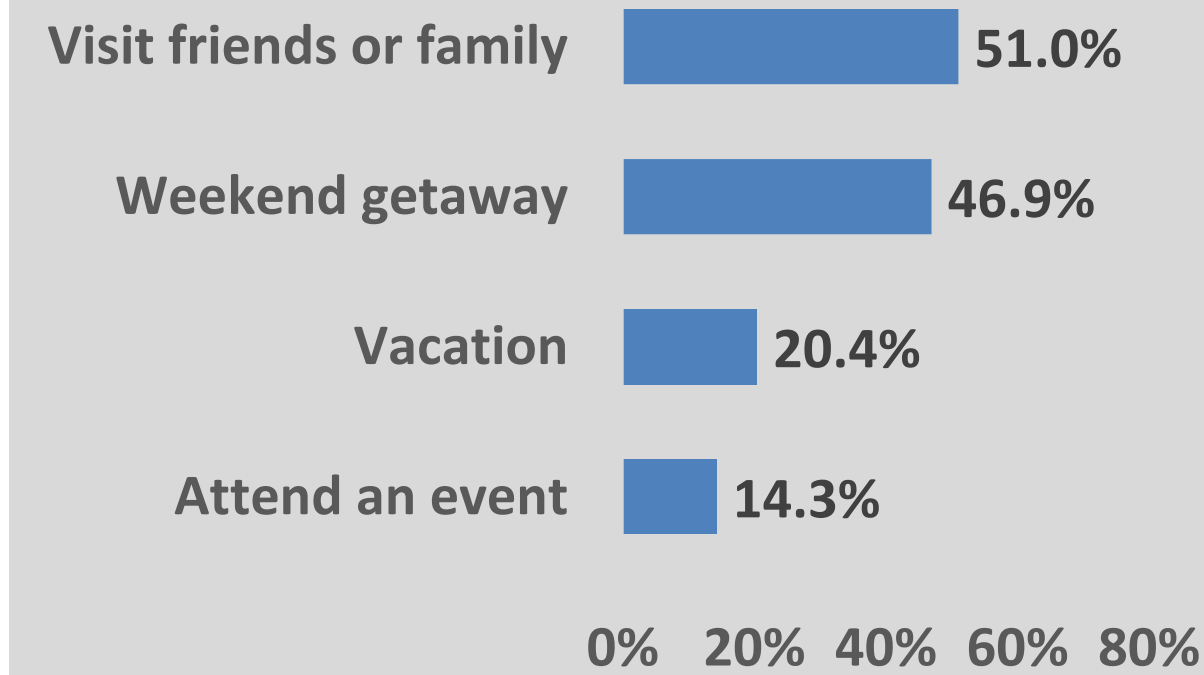
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



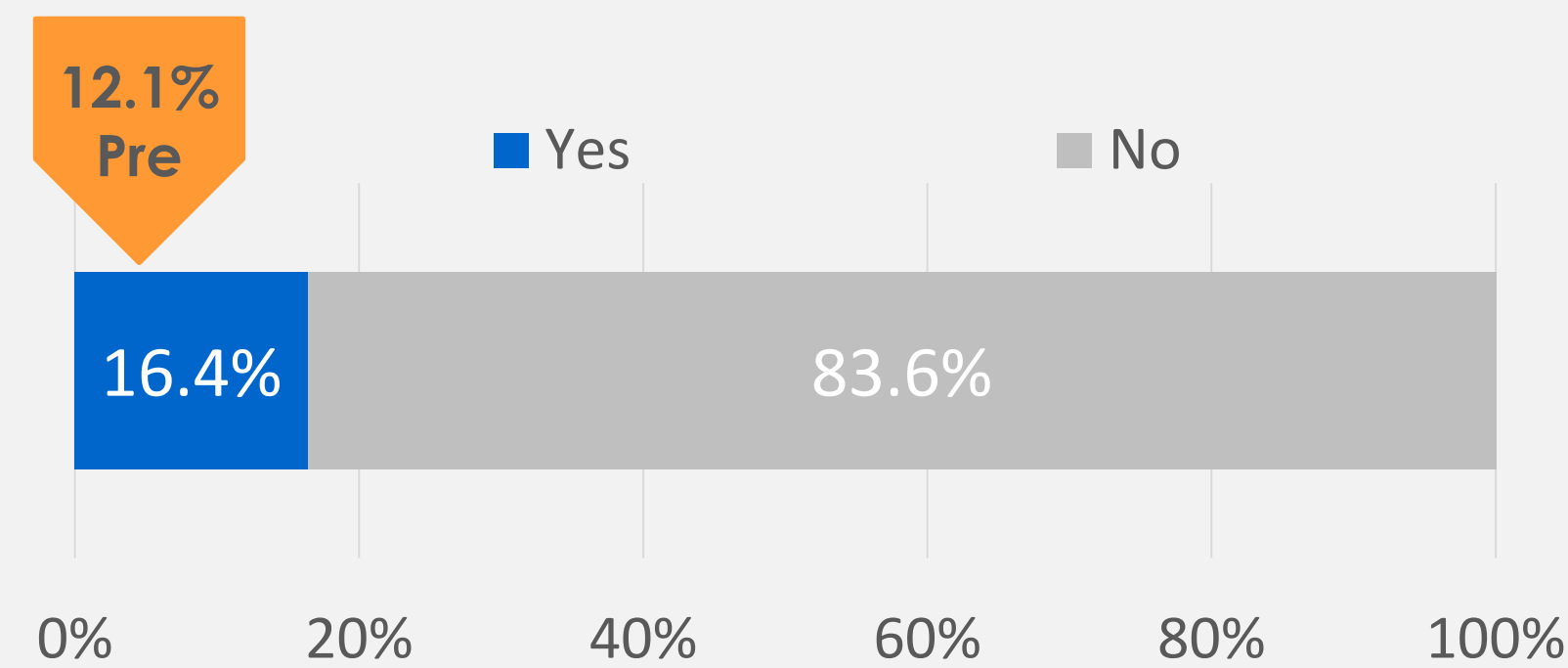
## Top Reasons for Visiting



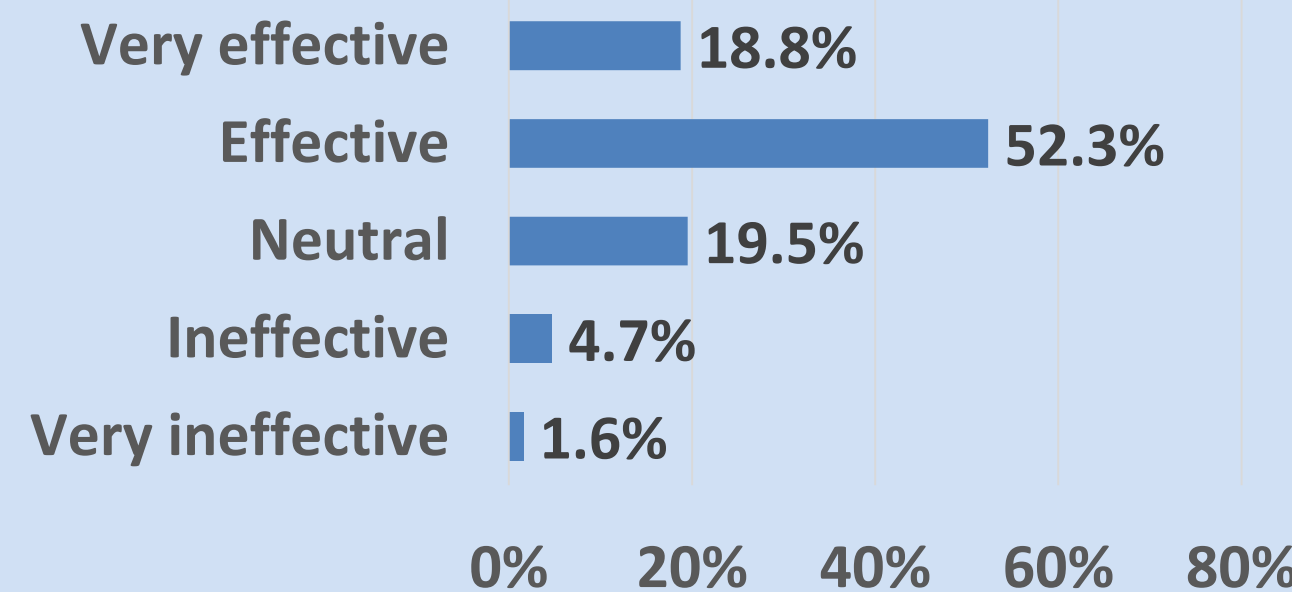
## Total In-Market Spend



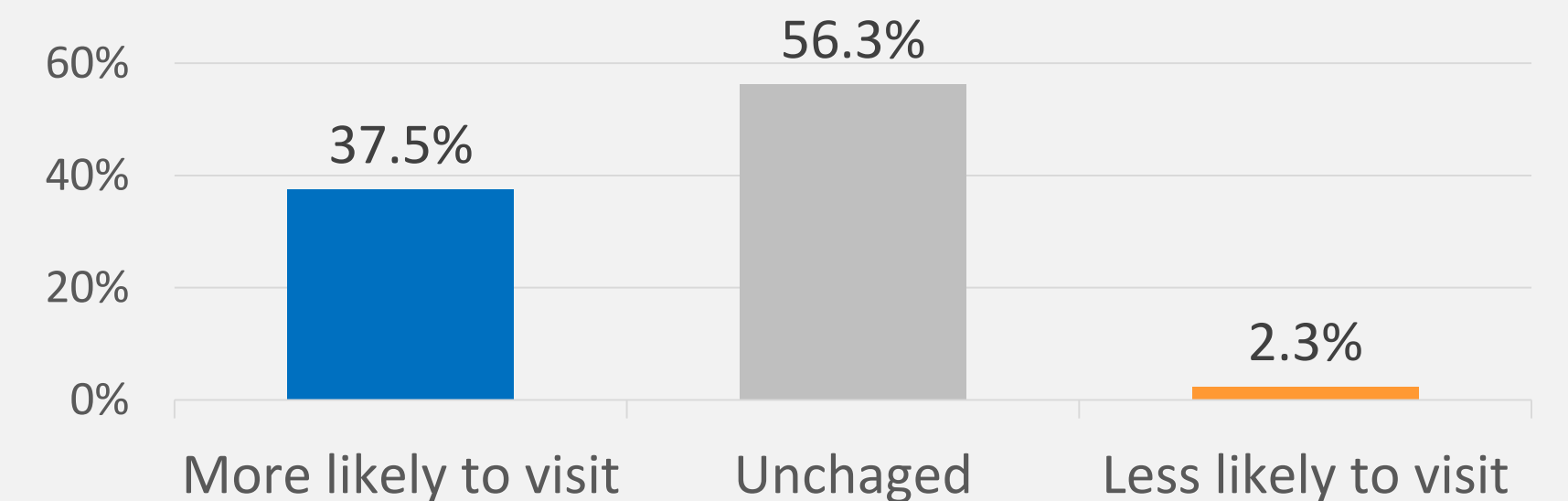
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



## Ads' Affect on Likelihood to Visit MD

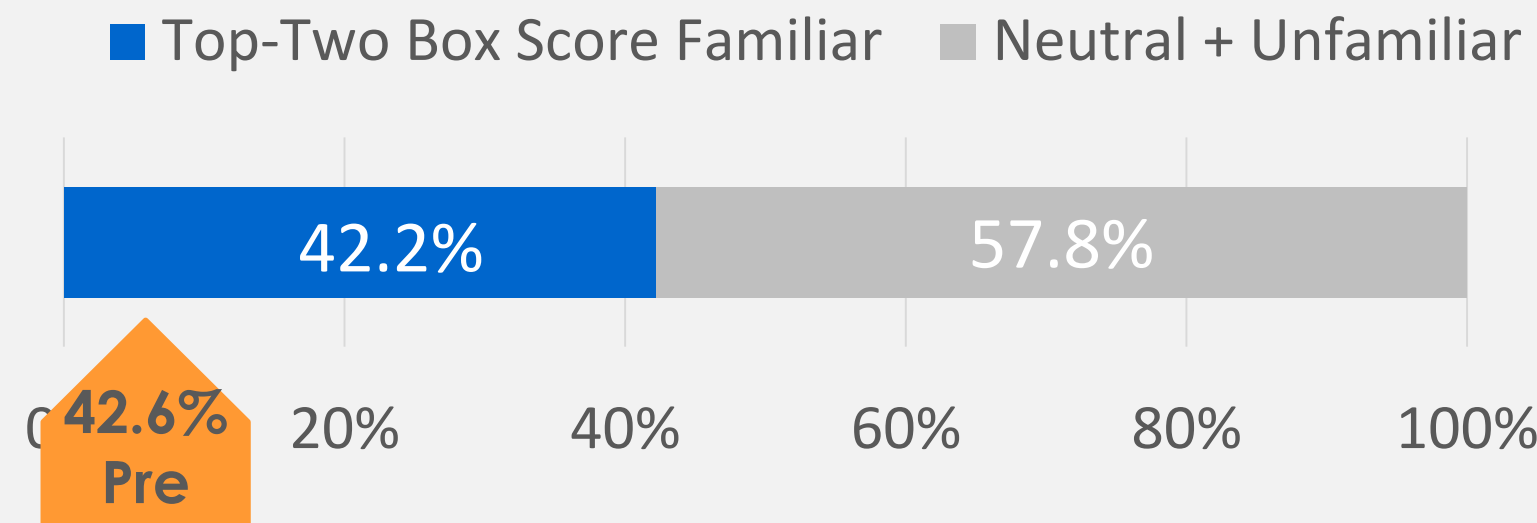




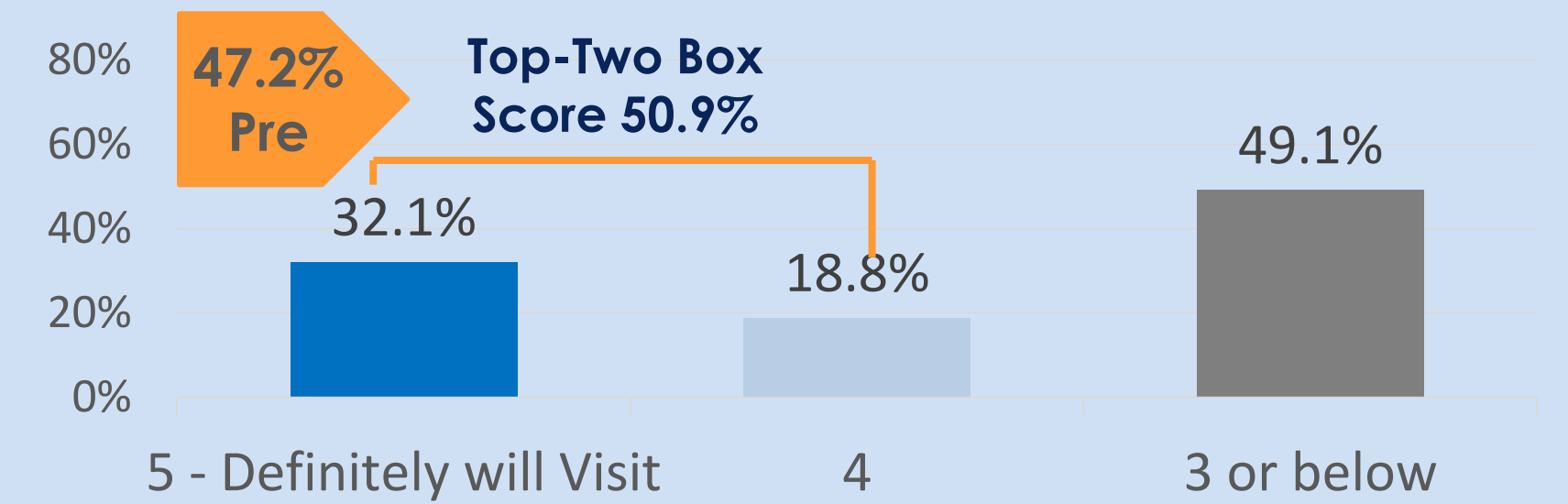
# OLDER MILLENNIAL

(Travelers aged 32-39 years old)

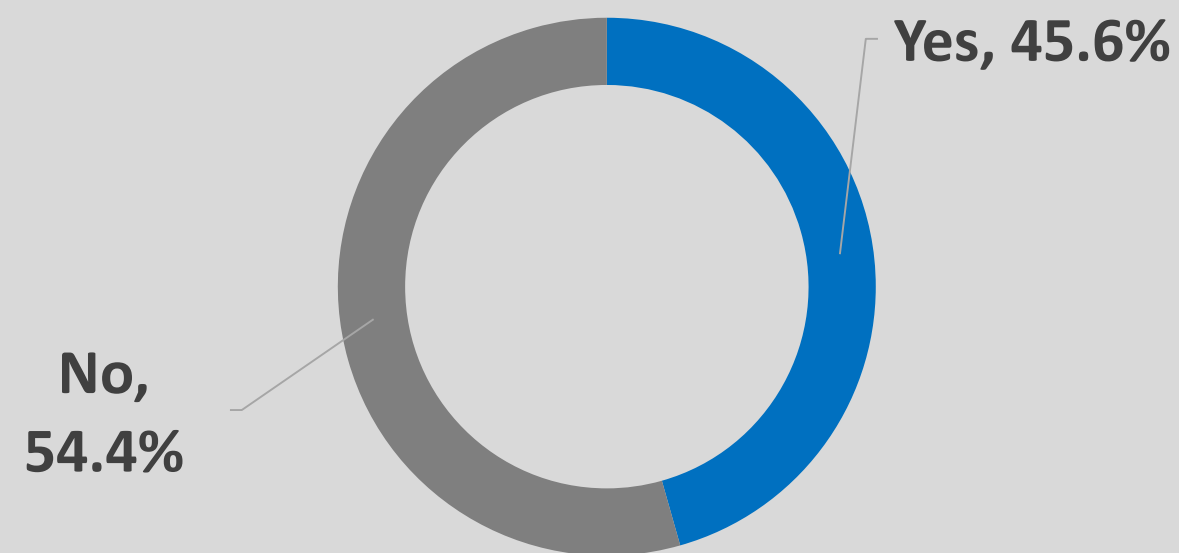
## Familiarity With Maryland



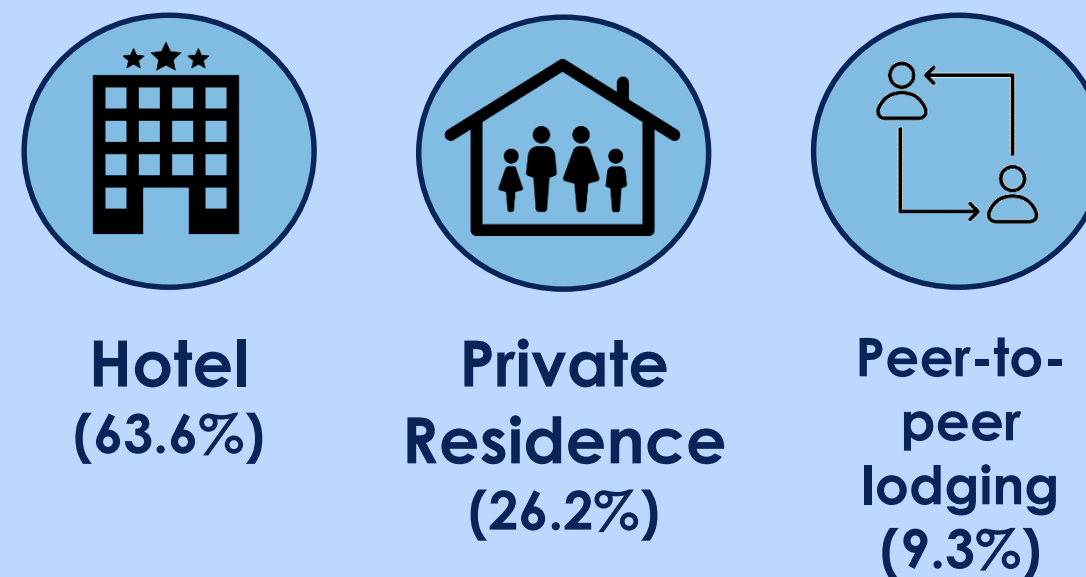
## Likelihood to Visit MD (Next 12 Months)



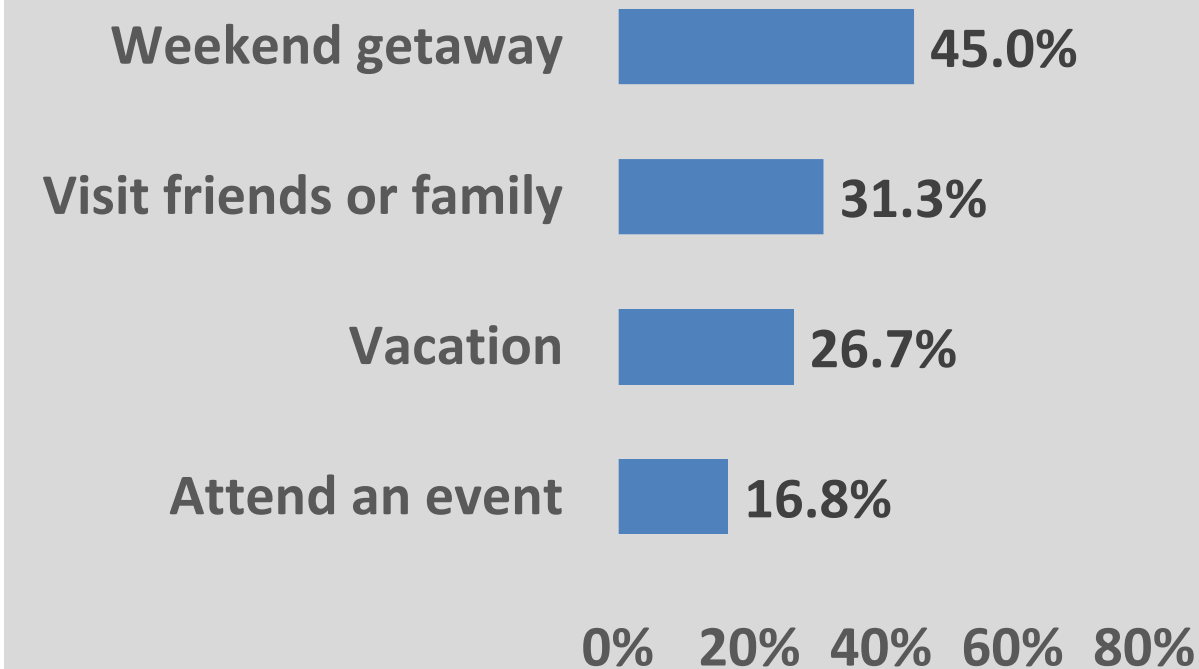
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



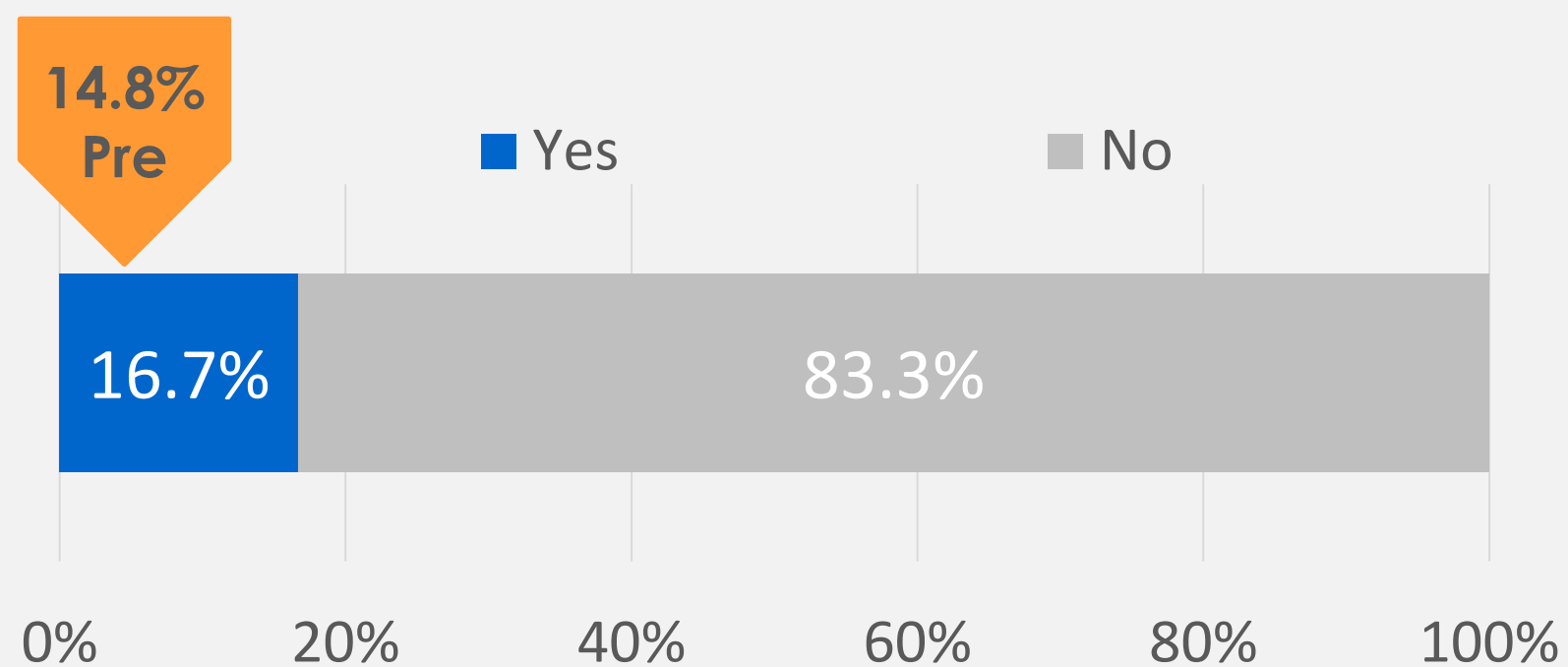
## Top Reasons for Visiting



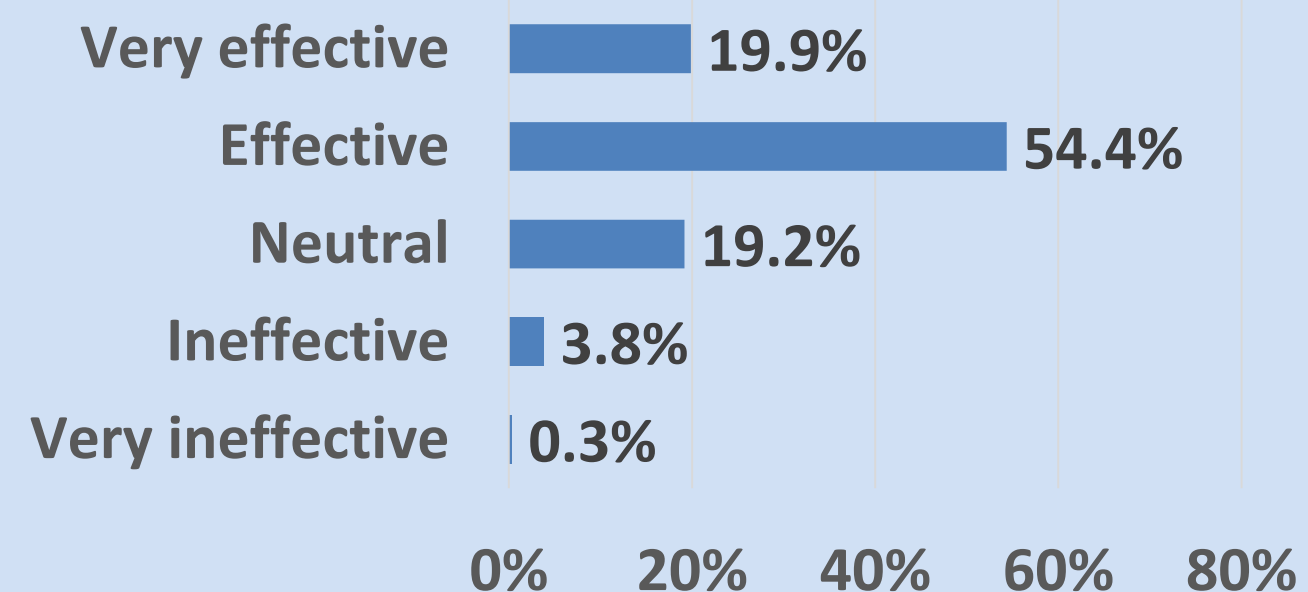
## Total In-Market Spend



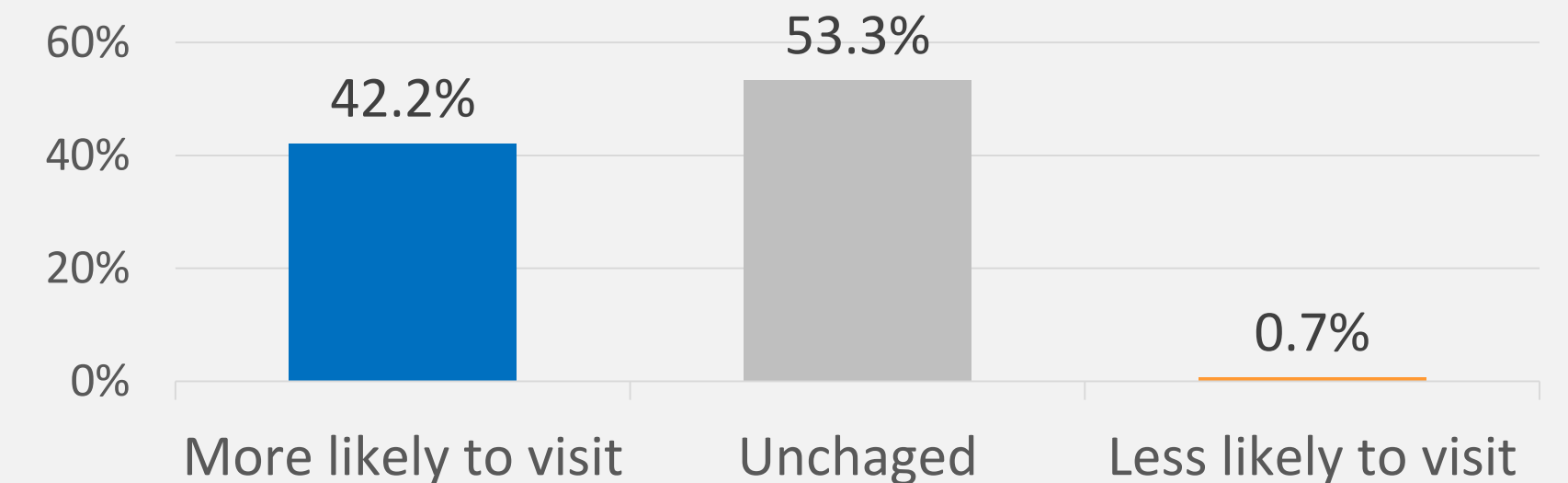
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



## Ads' Affect on Likelihood to Visit MD

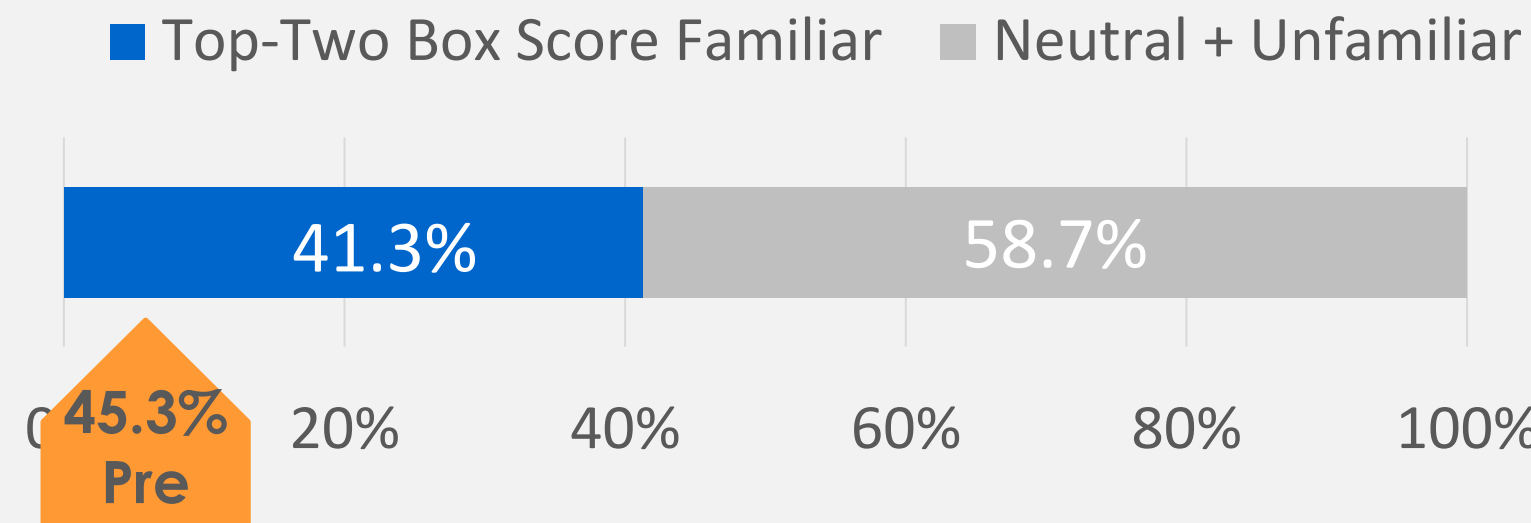




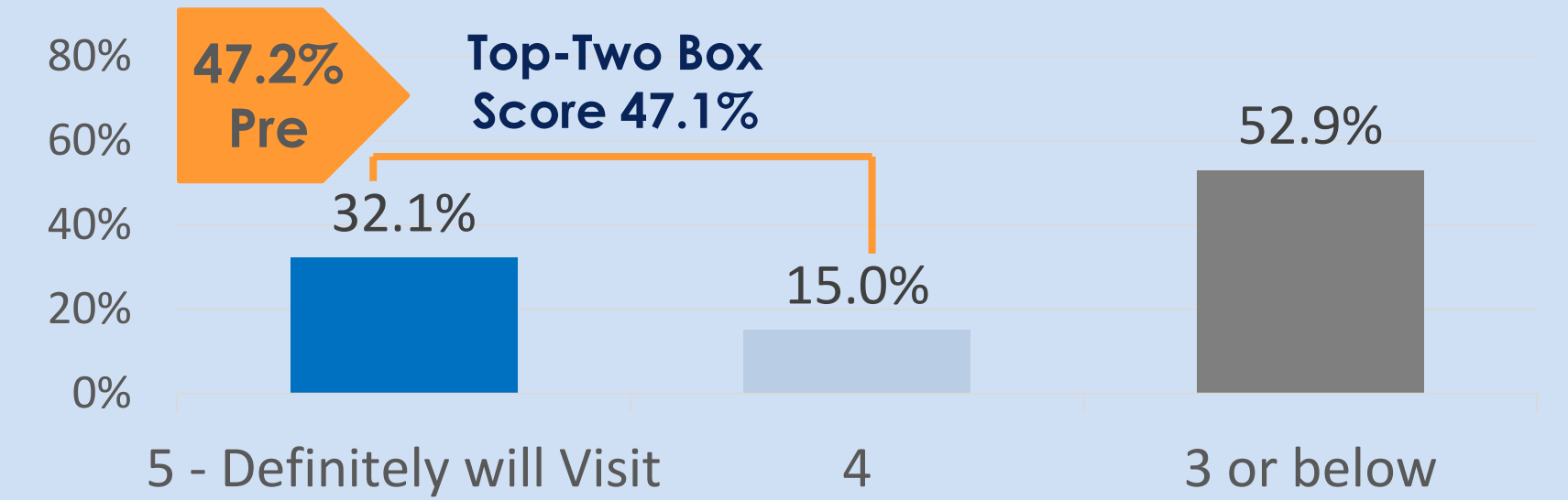
# GEN X

(Travelers aged 40-50 years old)

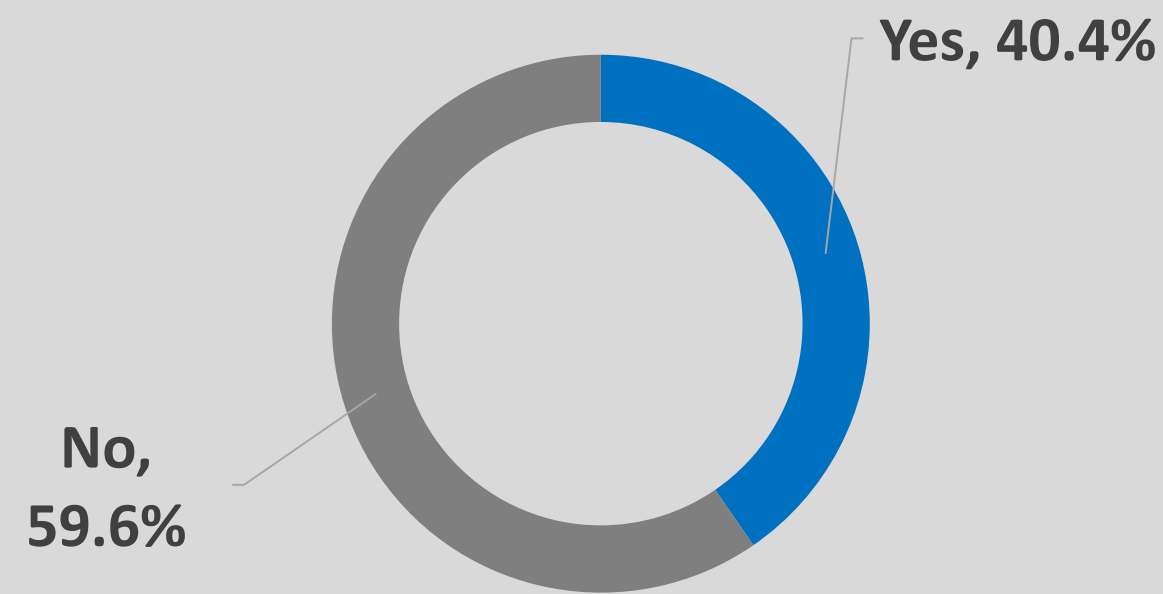
## Familiarity With Maryland



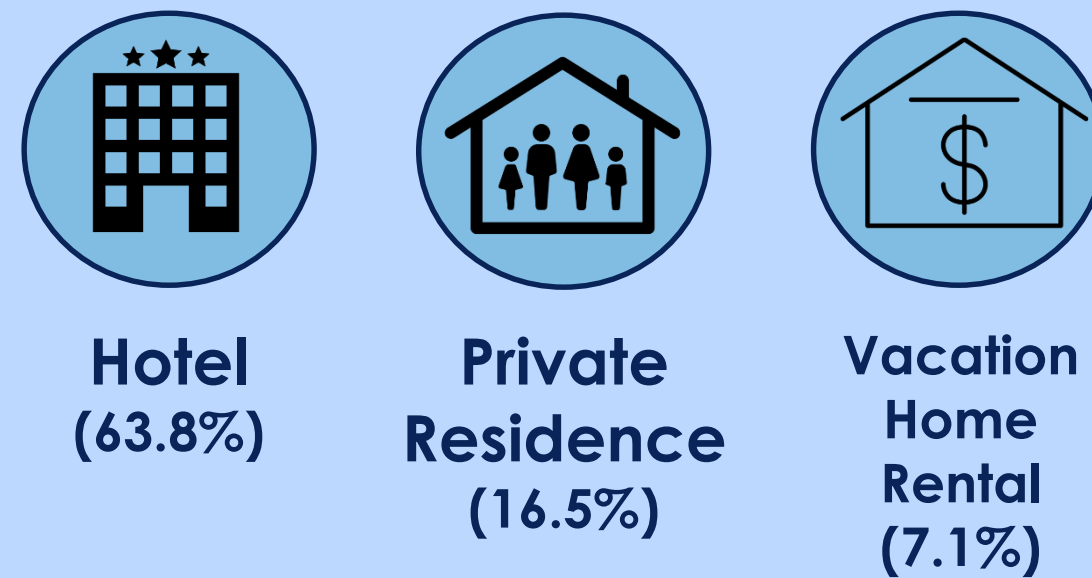
## Likelihood to Visit MD (Next 12 Months)



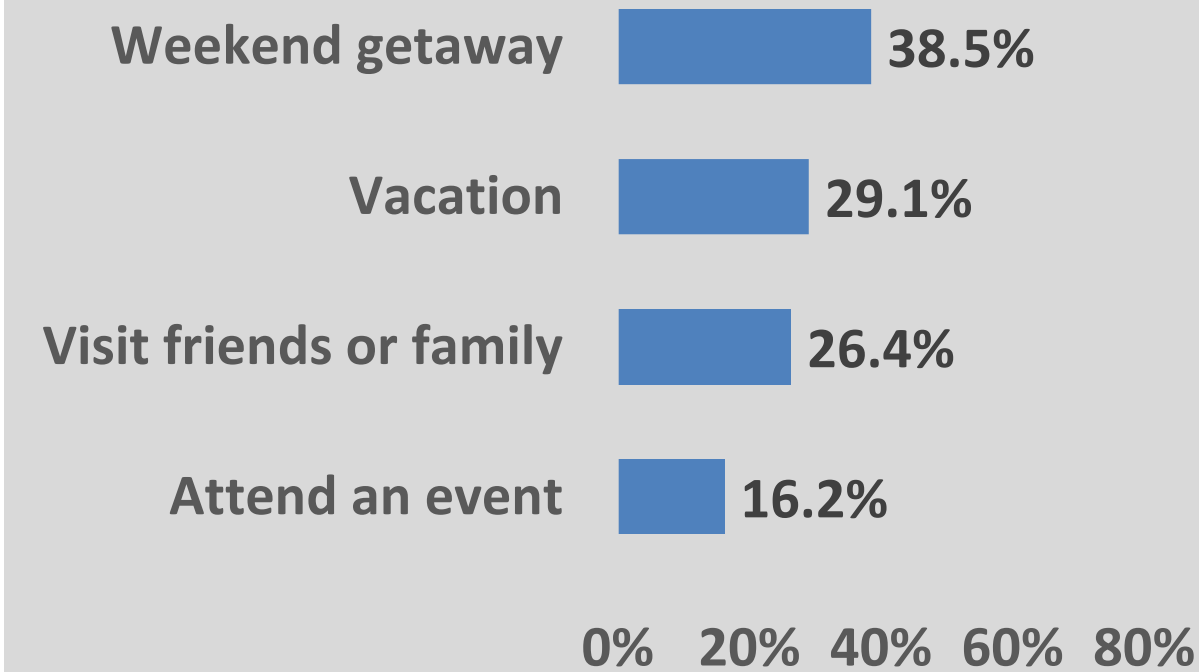
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



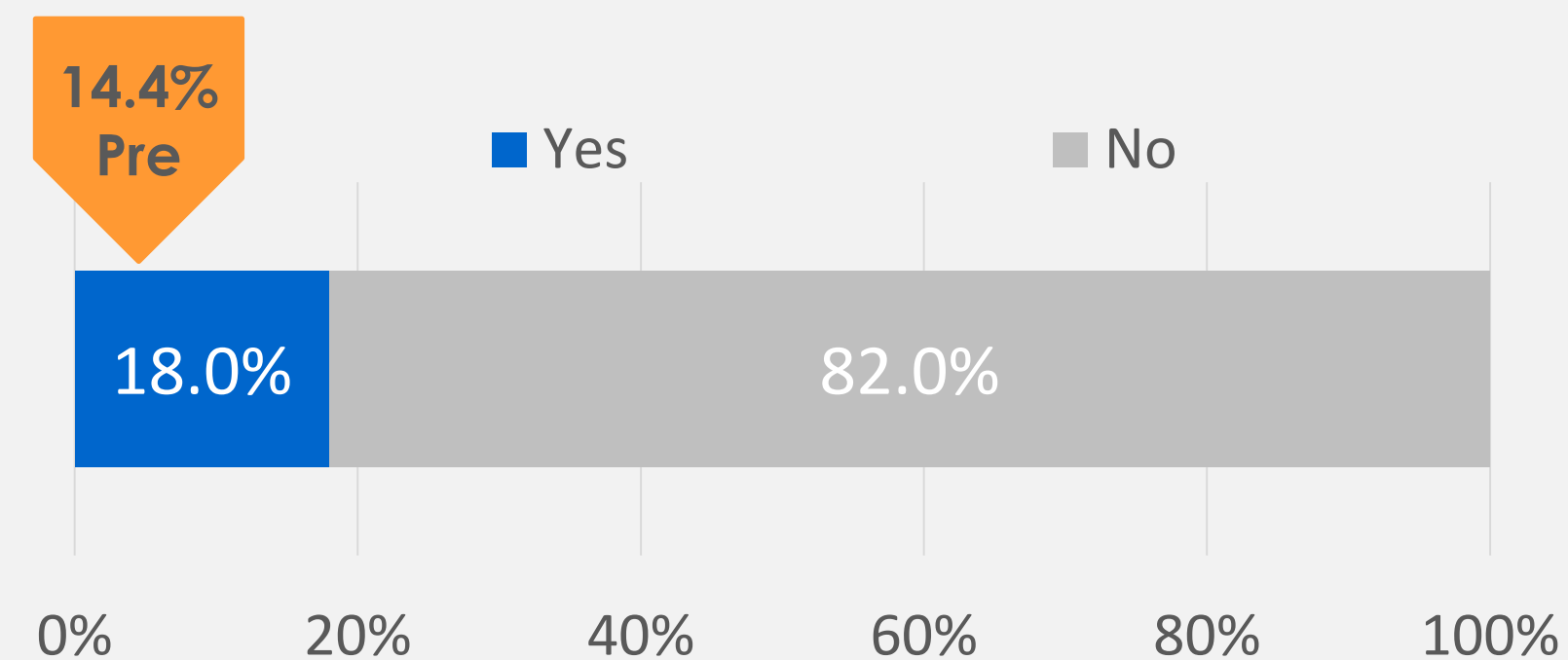
## Top Reasons for Visiting



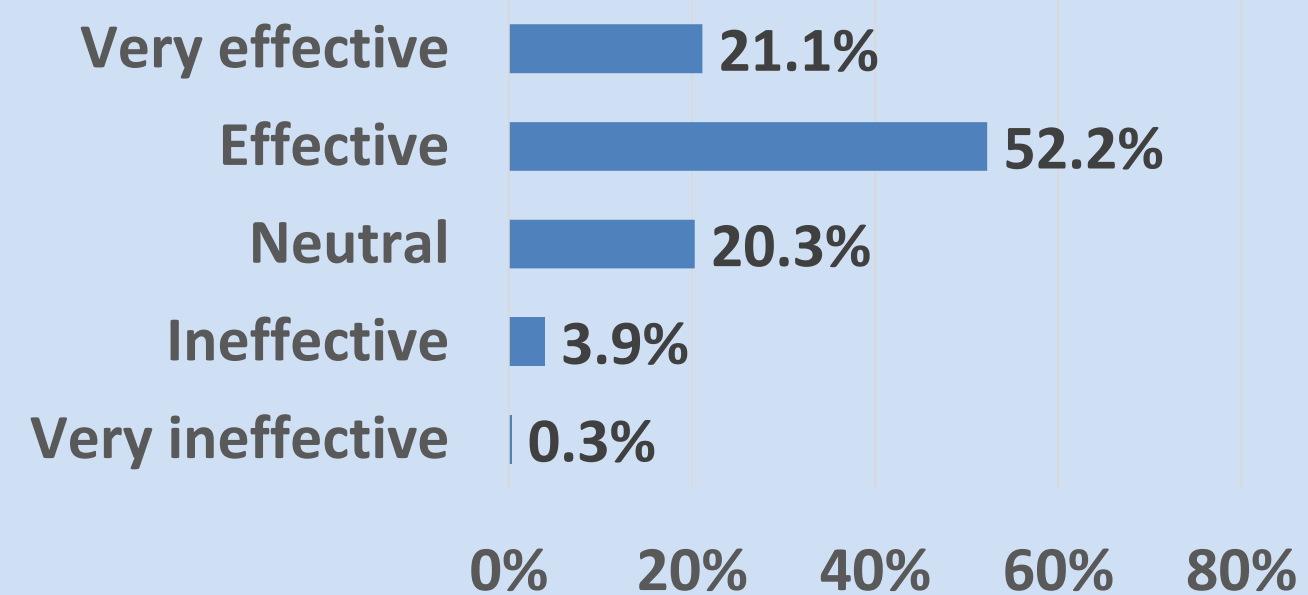
## Total In-Market Spend



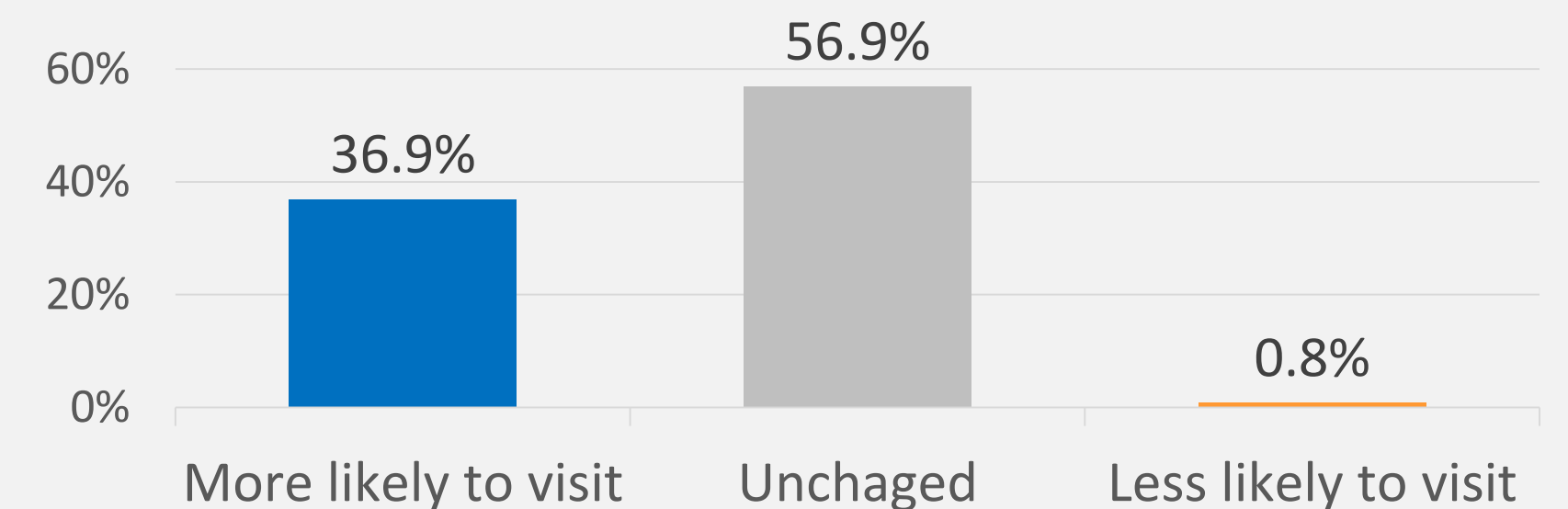
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



## Ads' Affect on Likelihood to Visit MD

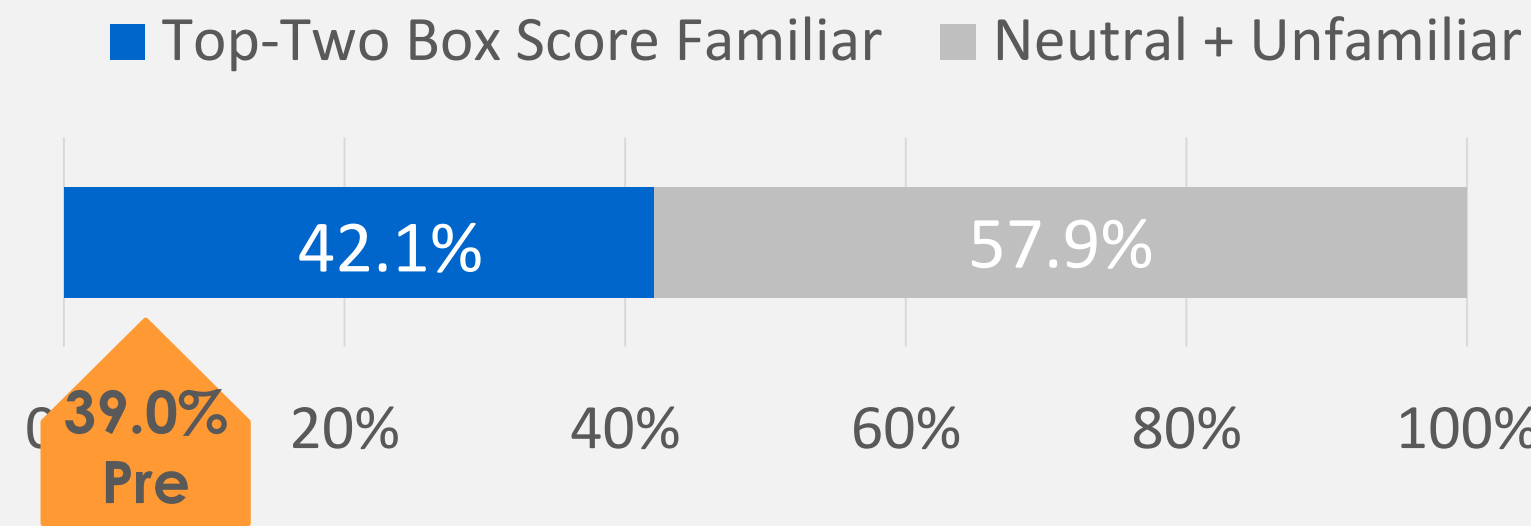




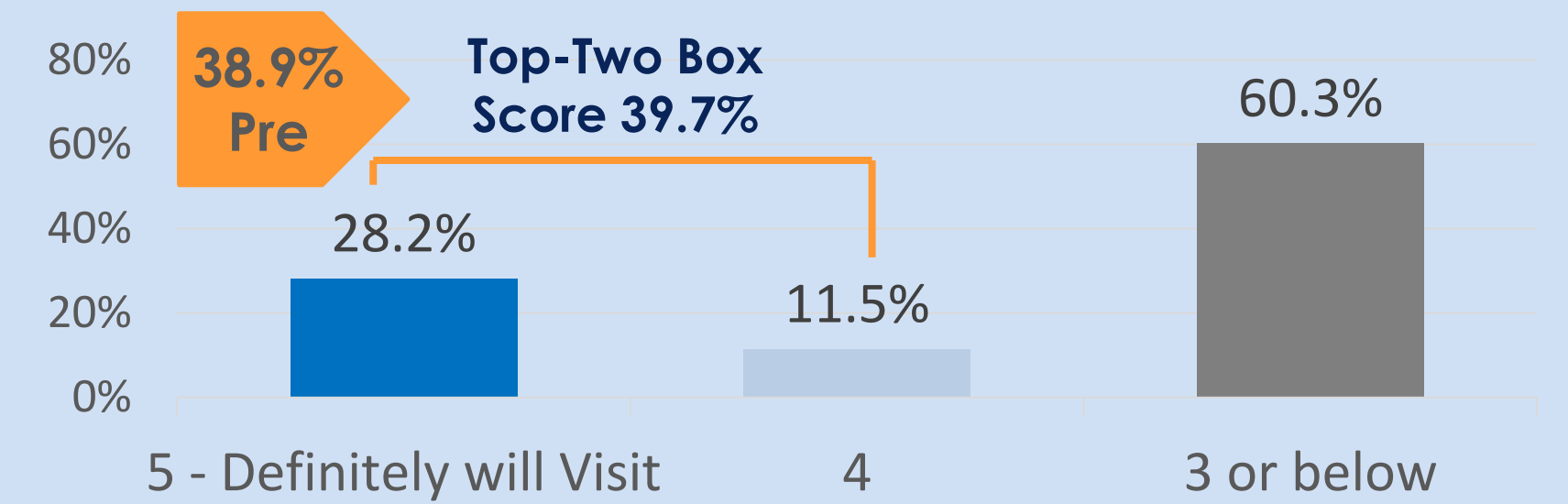
# YOUNGER BOOMER

(Travelers aged 51-61 years old)

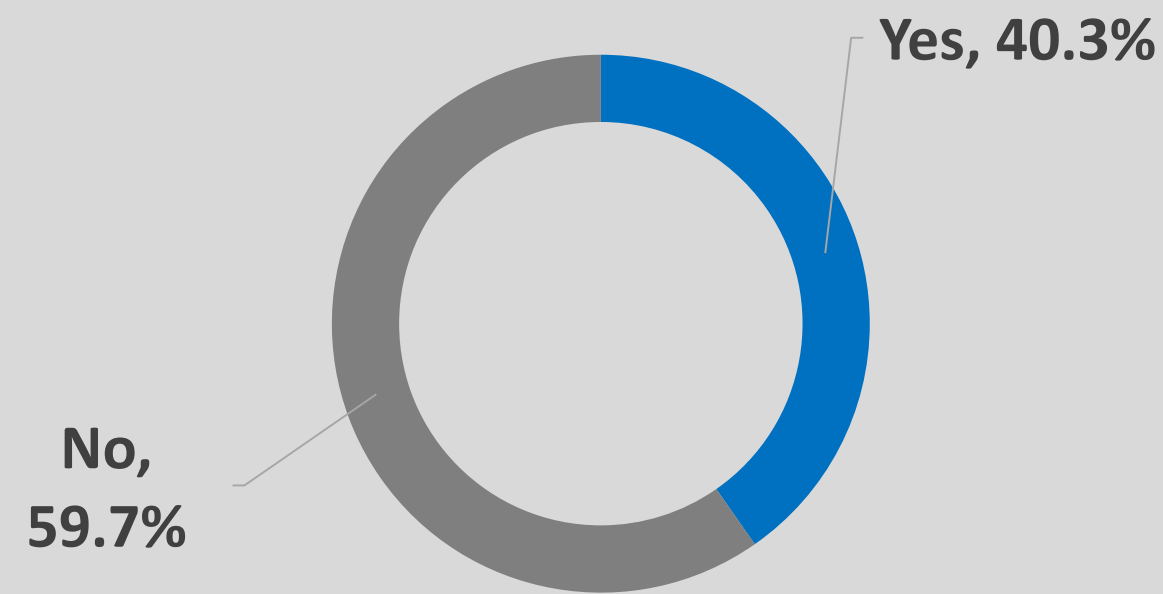
## Familiarity With Maryland



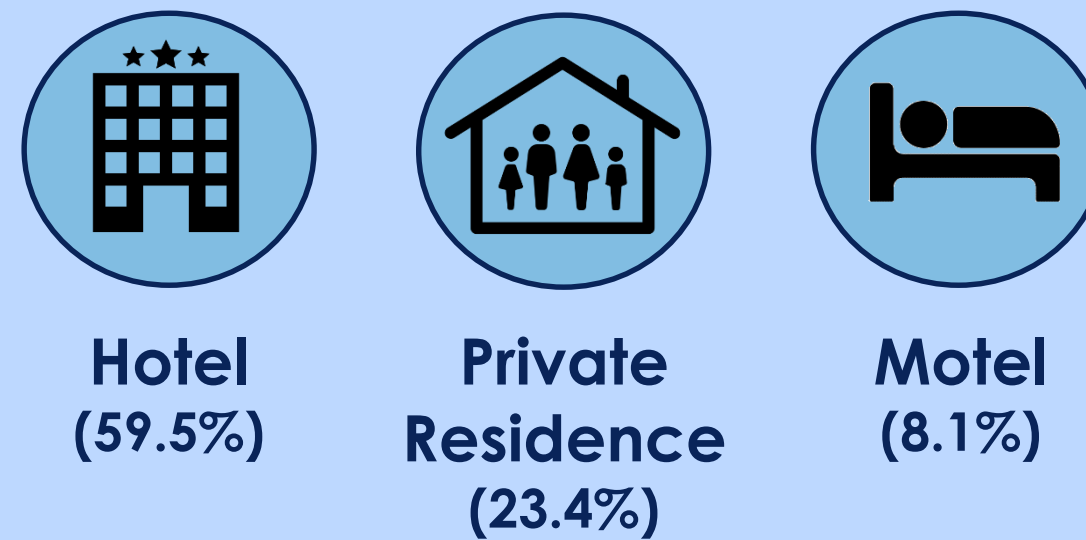
## Likelihood to Visit MD (Next 12 Months)



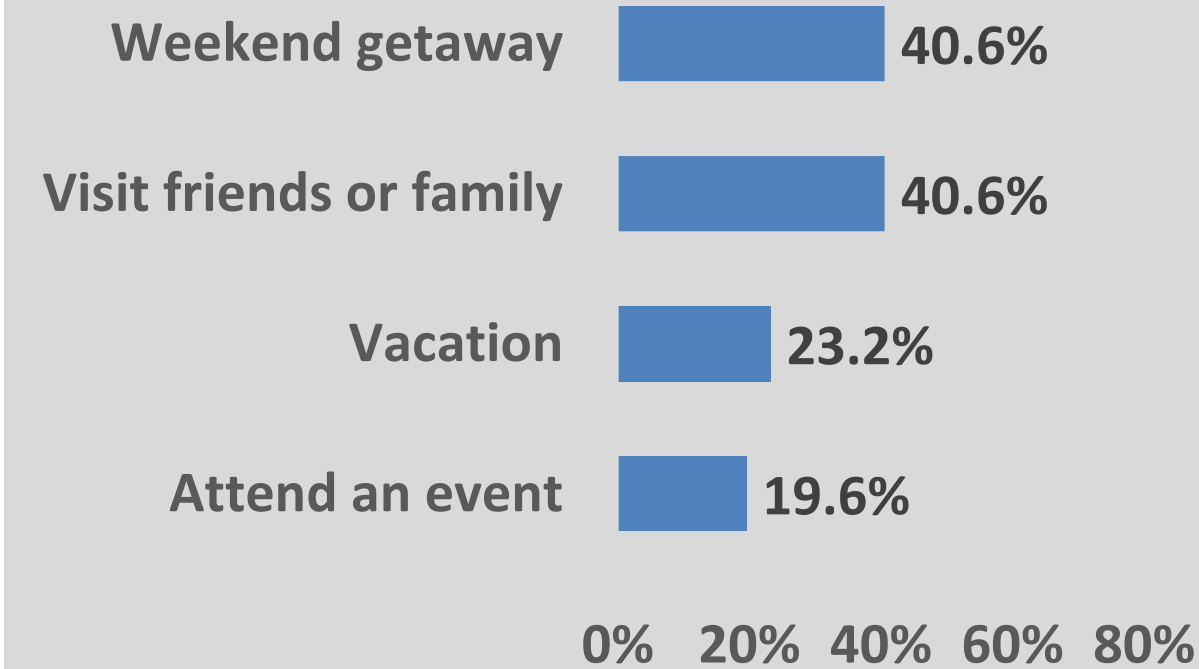
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



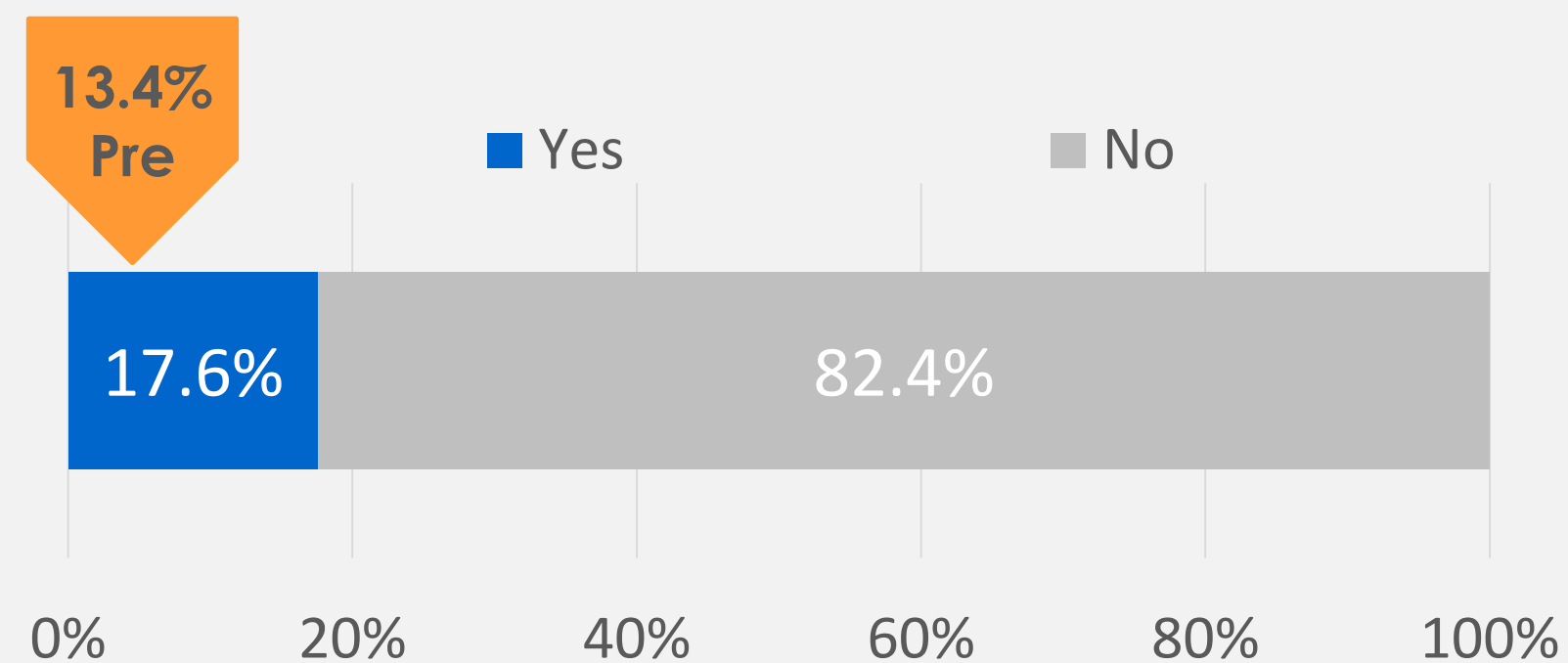
## Top Reasons for Visiting



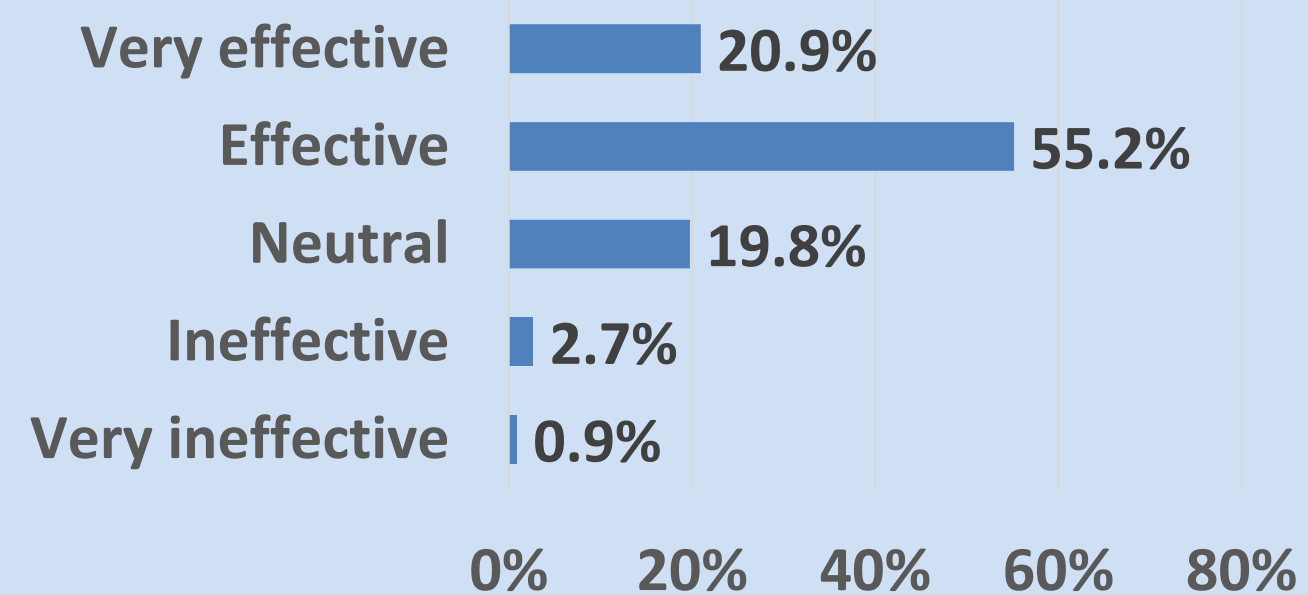
## Total In-Market Spend



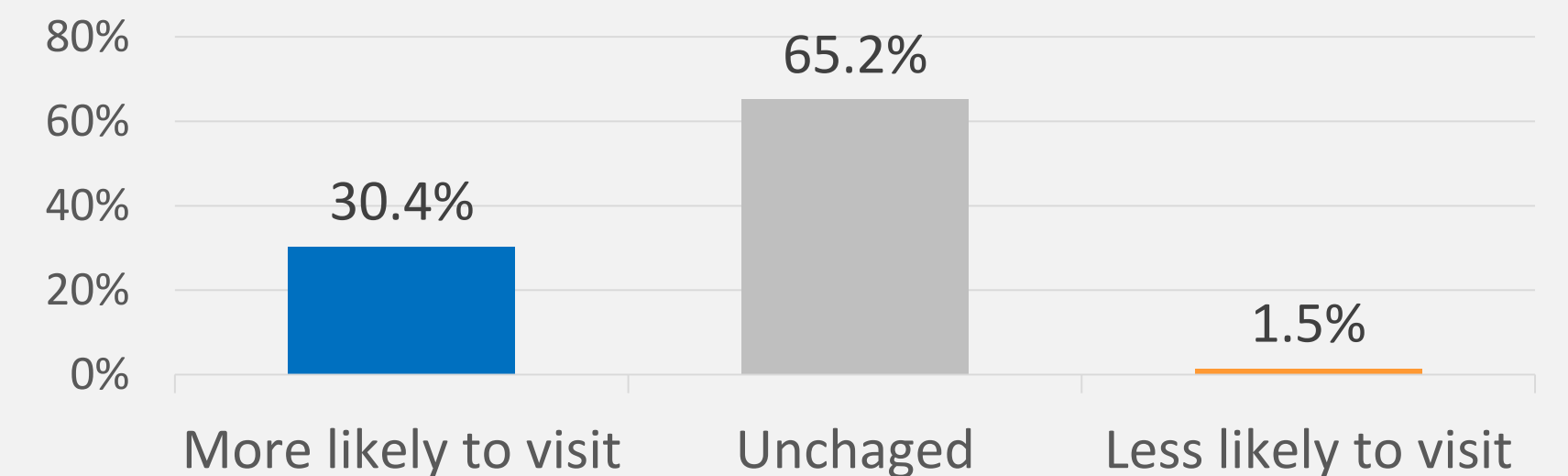
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



## Ads' Affect on Likelihood to Visit MD

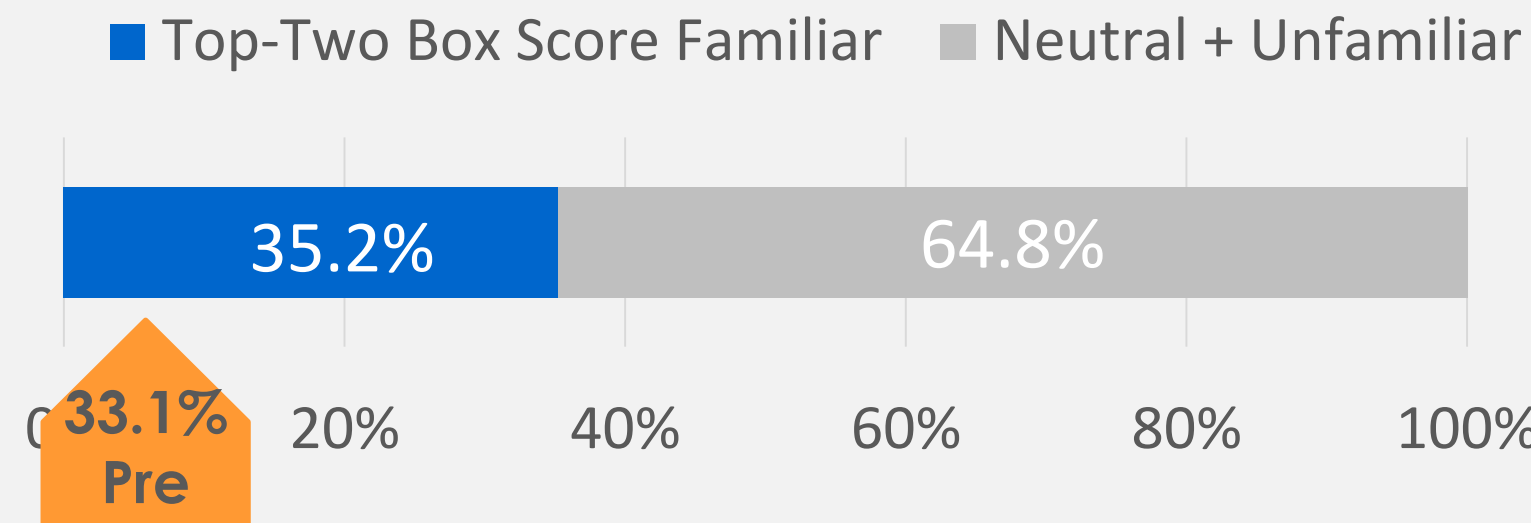




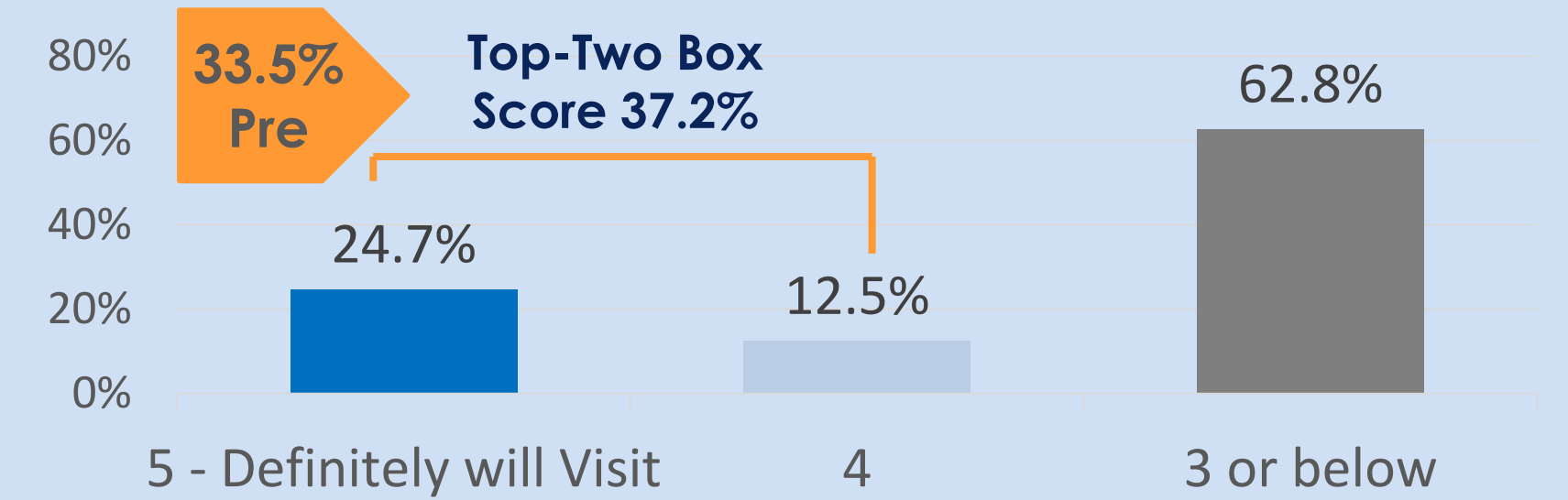
# OLDER BOOMER

(Travelers aged 62-71 years old)

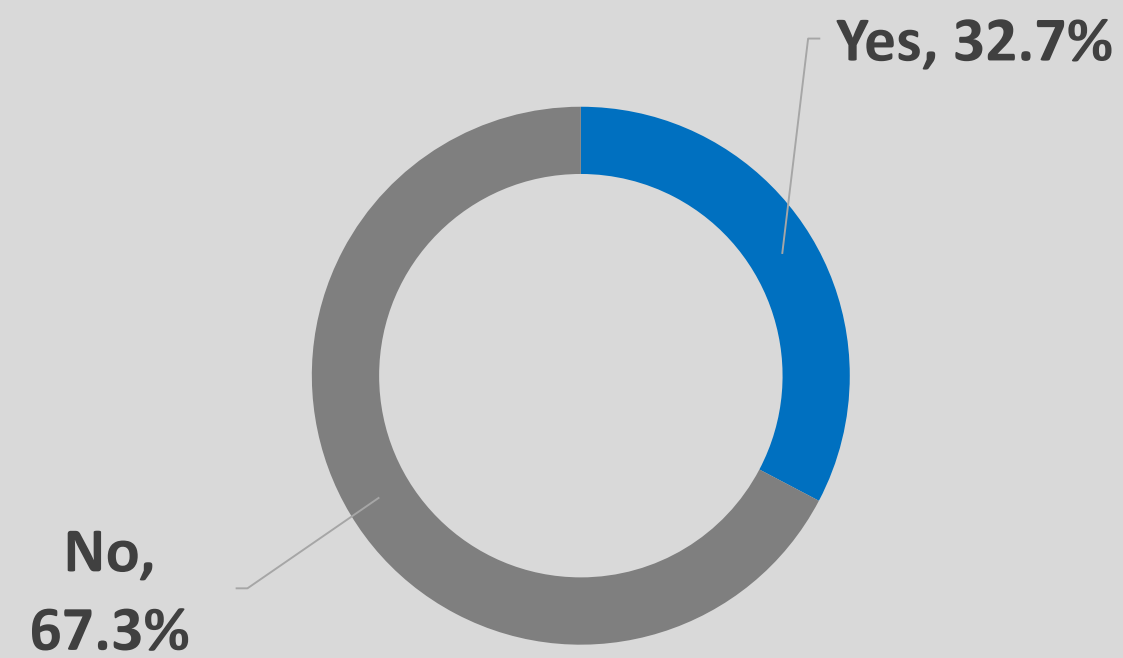
## Familiarity With Maryland



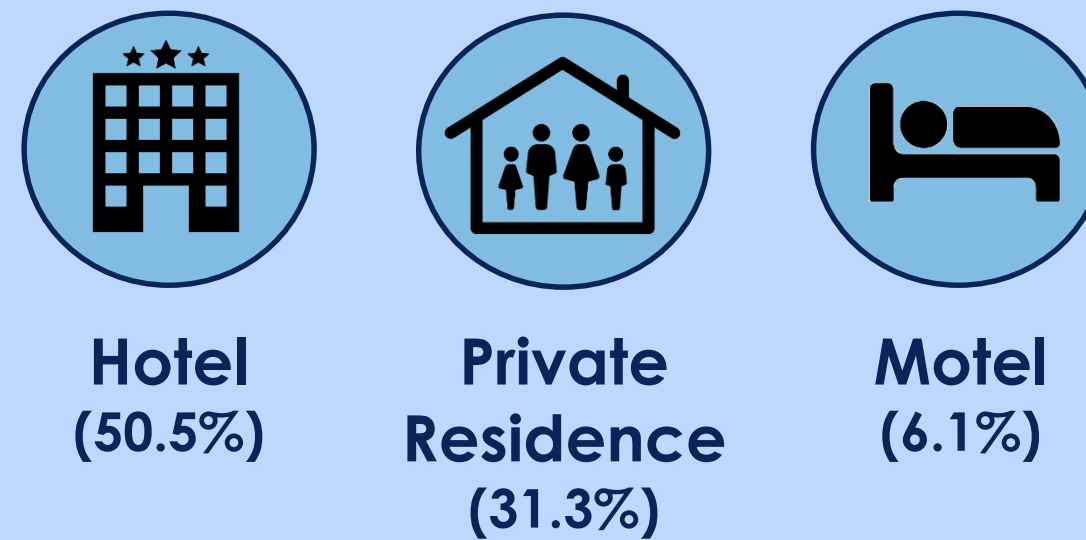
## Likelihood to Visit MD (Next 12 Months)



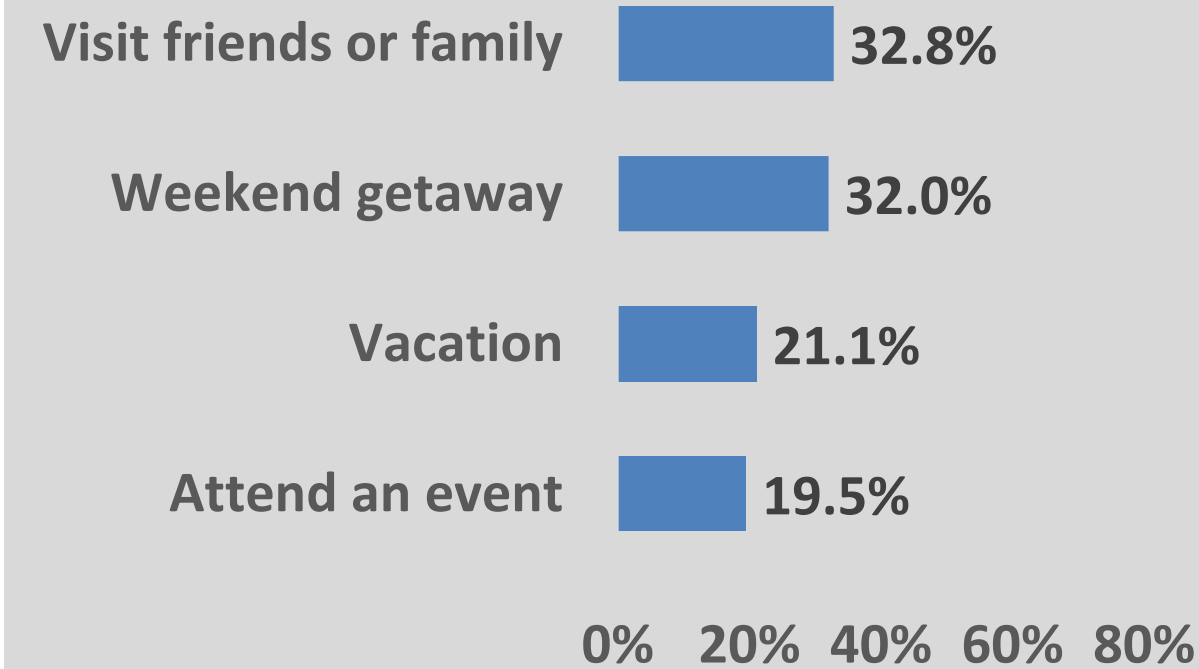
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



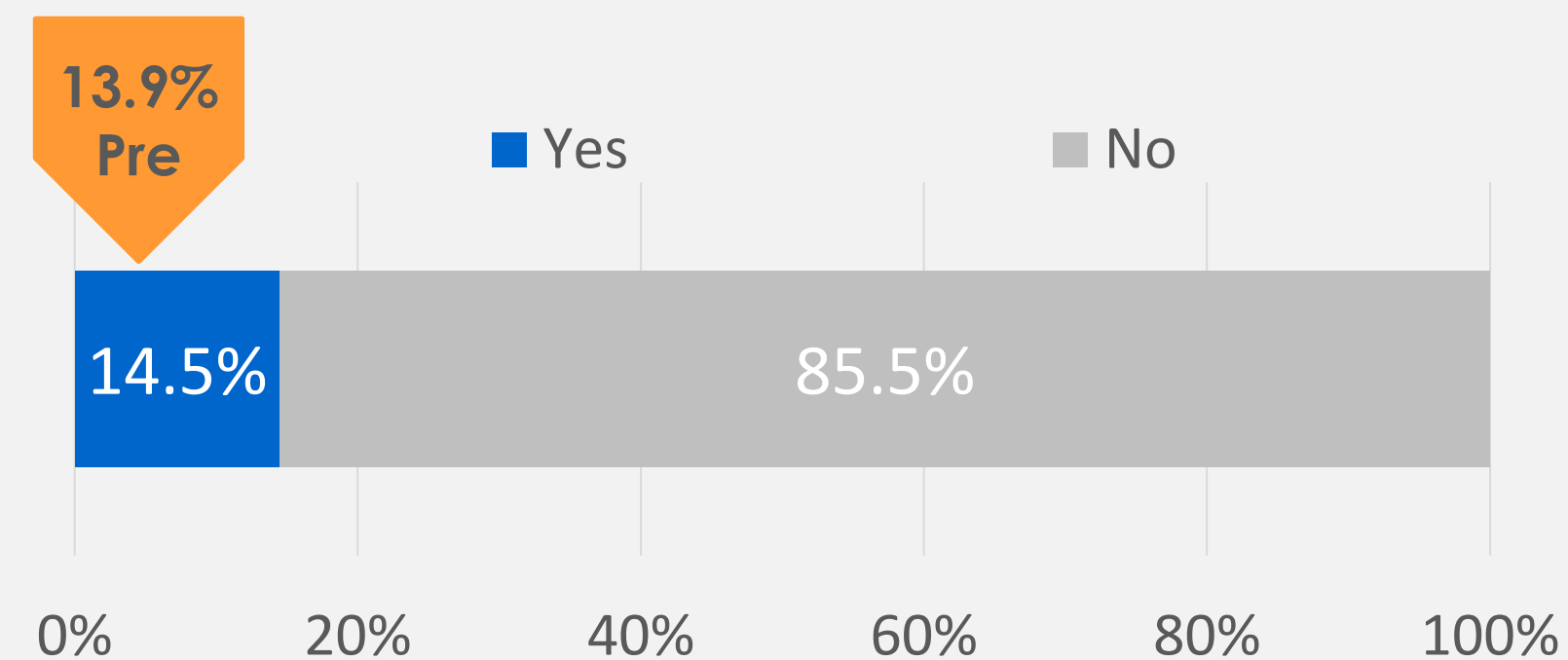
## Top Reasons for Visiting



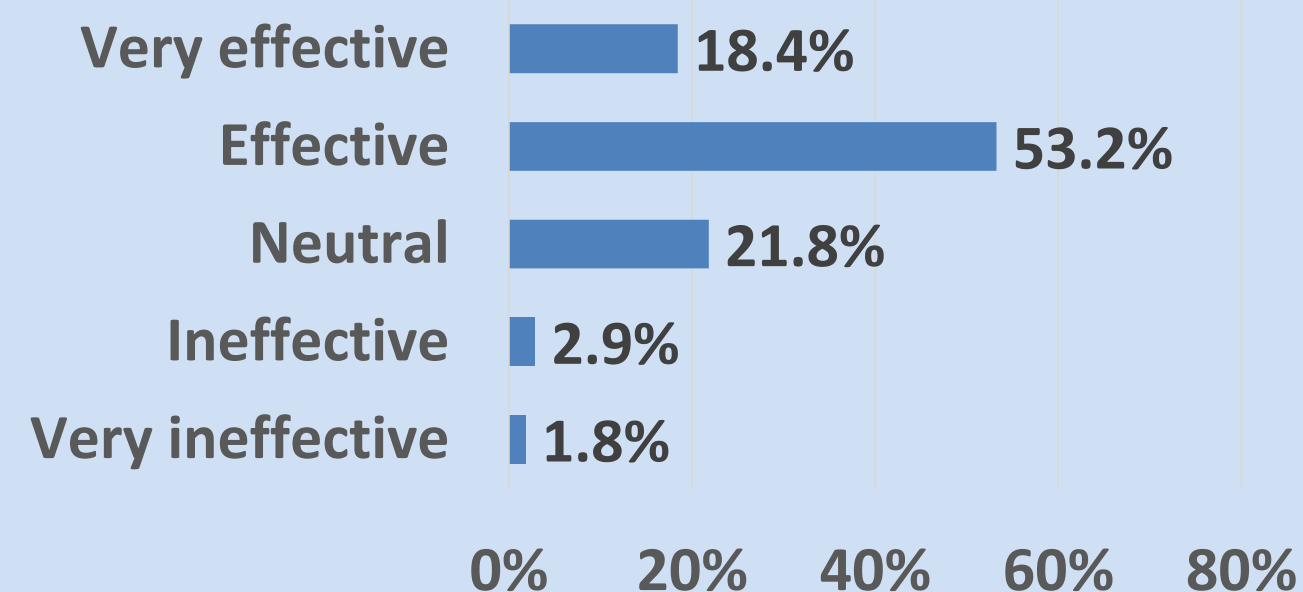
## Total In-Market Spend



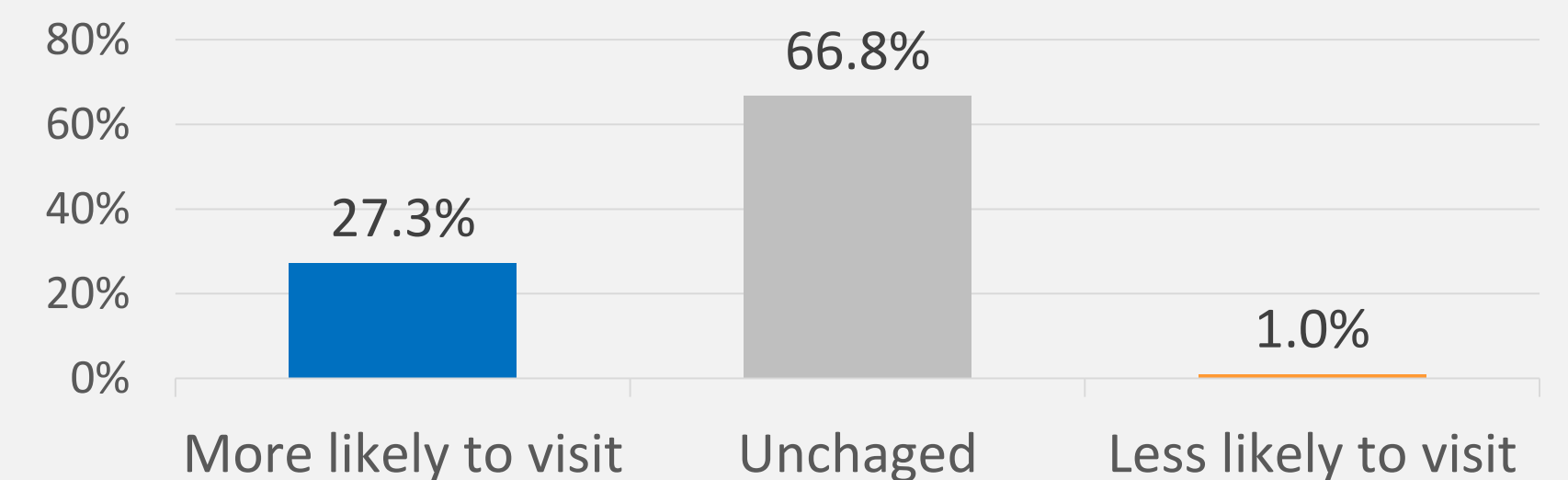
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



## Ads' Affect on Likelihood to Visit MD





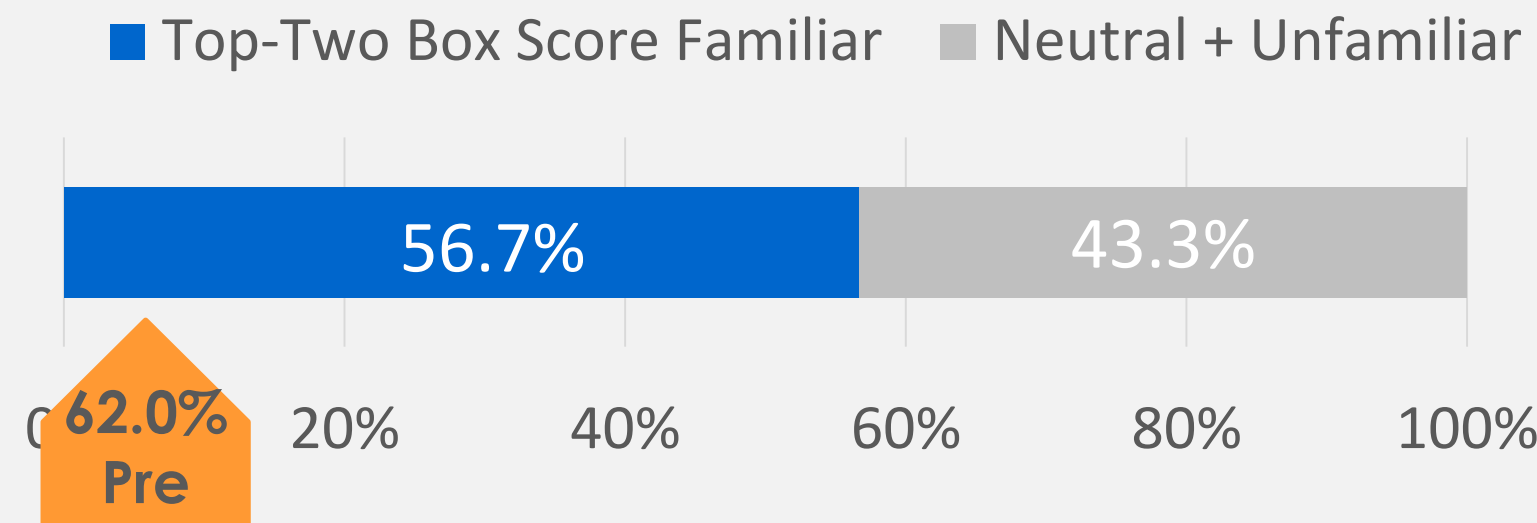


# OTHER SEGMENTS OF INTEREST

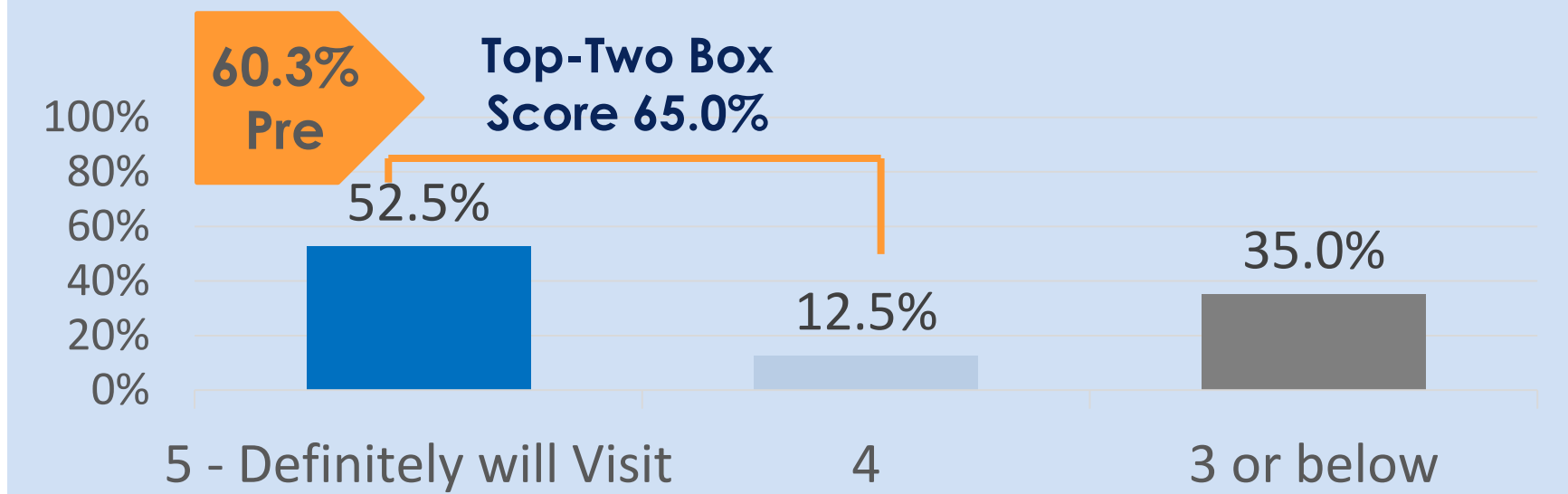


# THE AFRICAN-AMERICAN TRAVELER

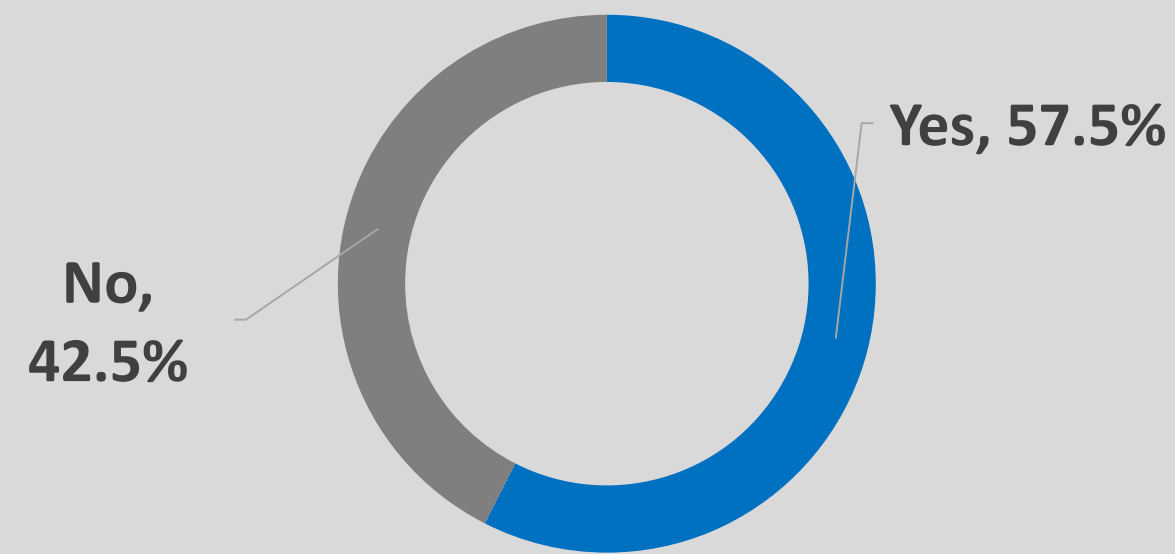
## Familiarity With Maryland



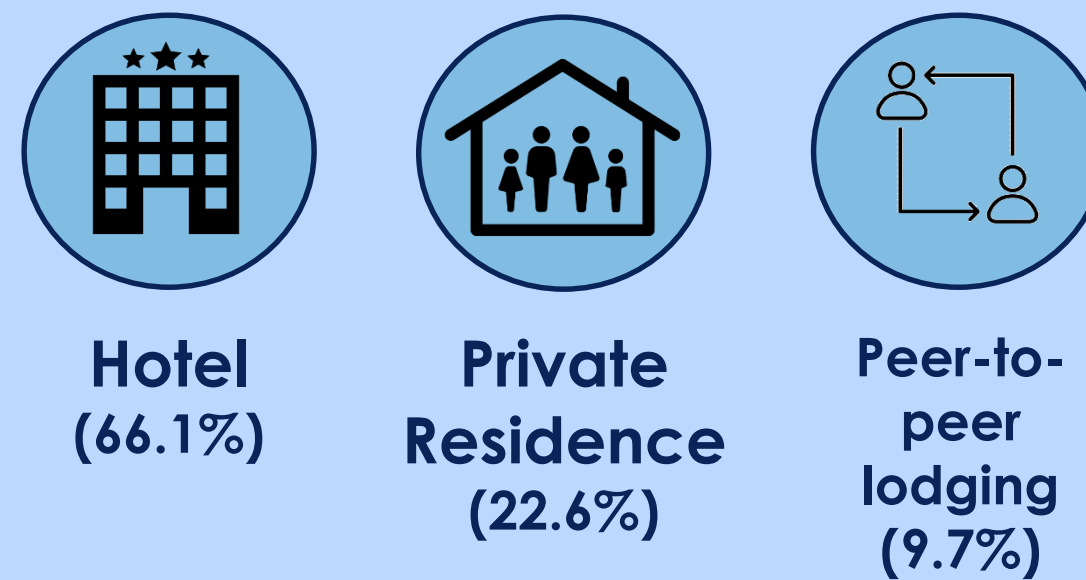
## Likelihood to Visit MD (Next 12 Months)



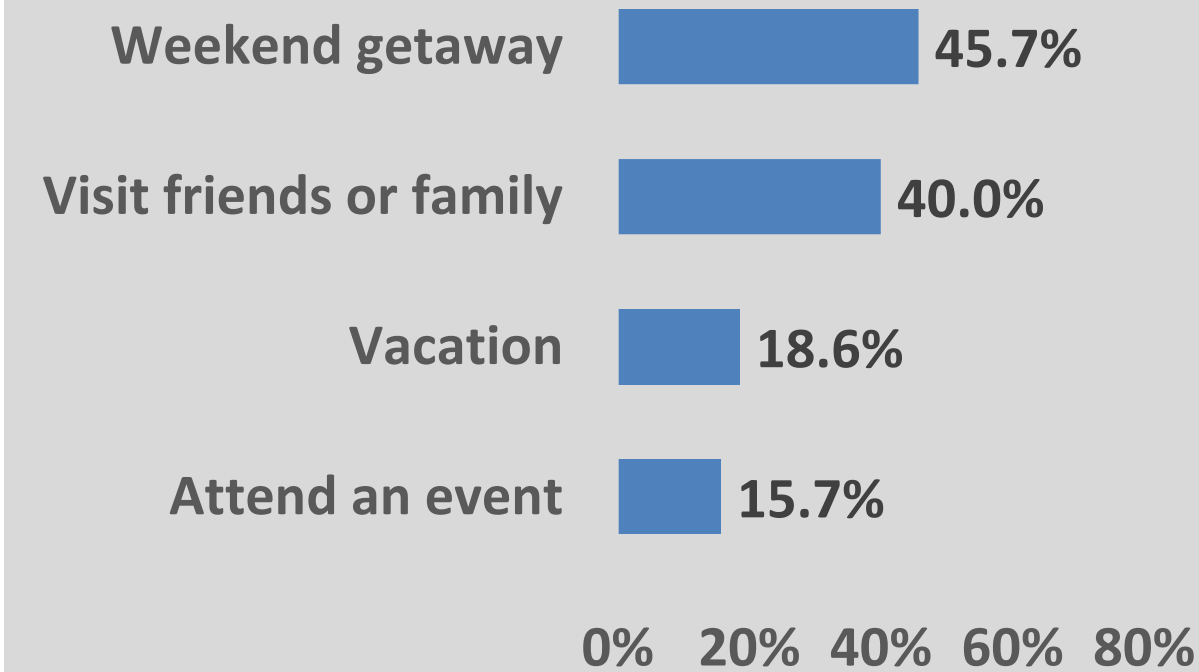
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



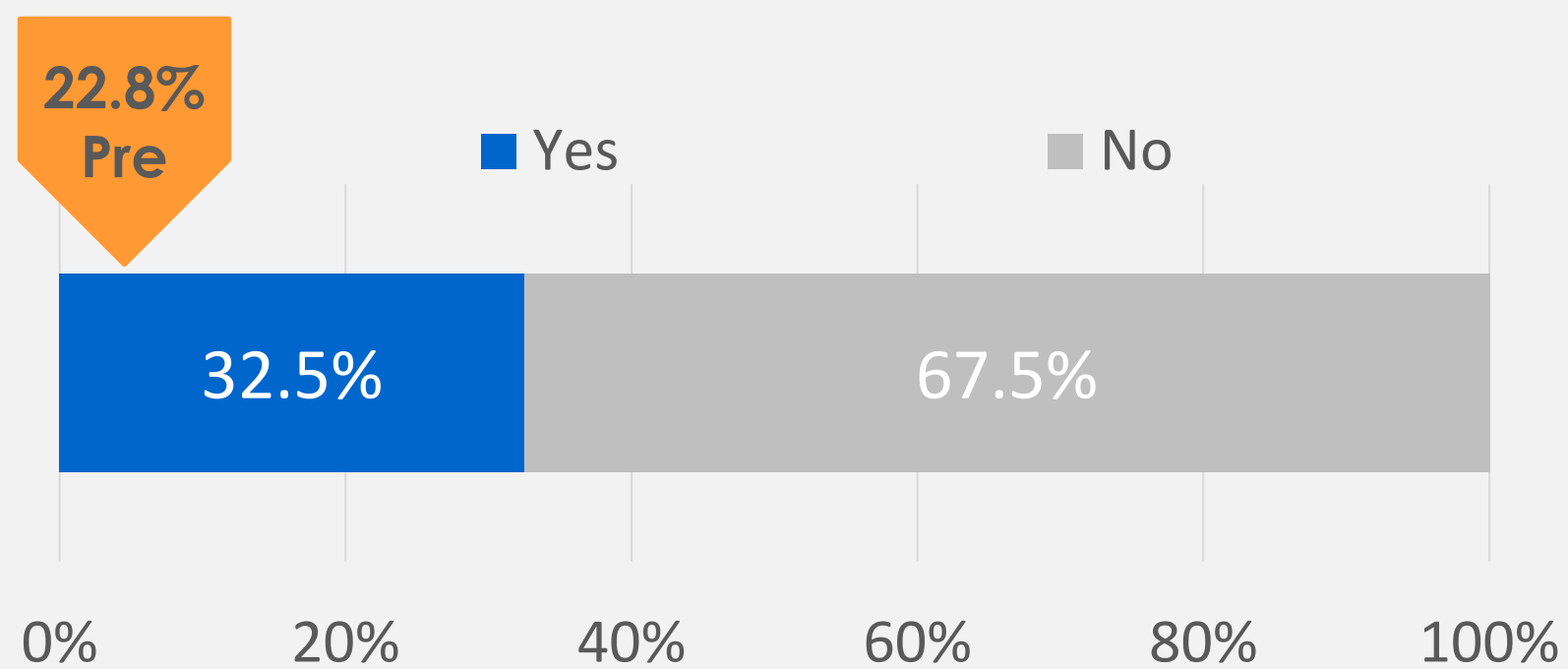
## Top Reasons for Visiting



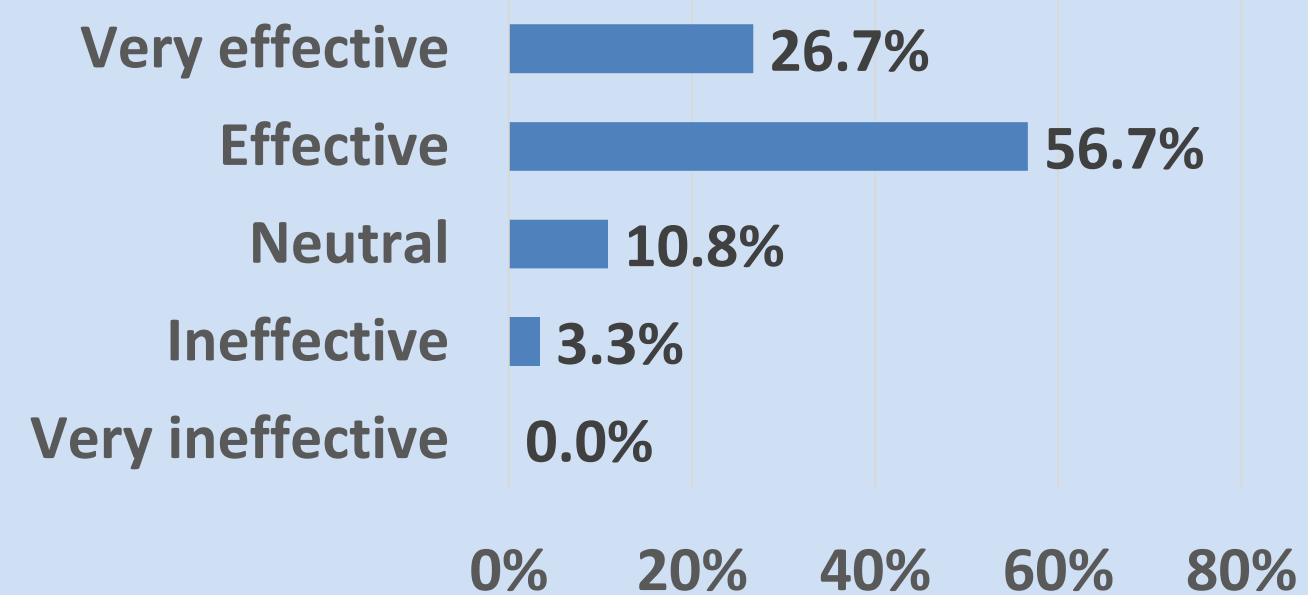
## Total In-Market Spend



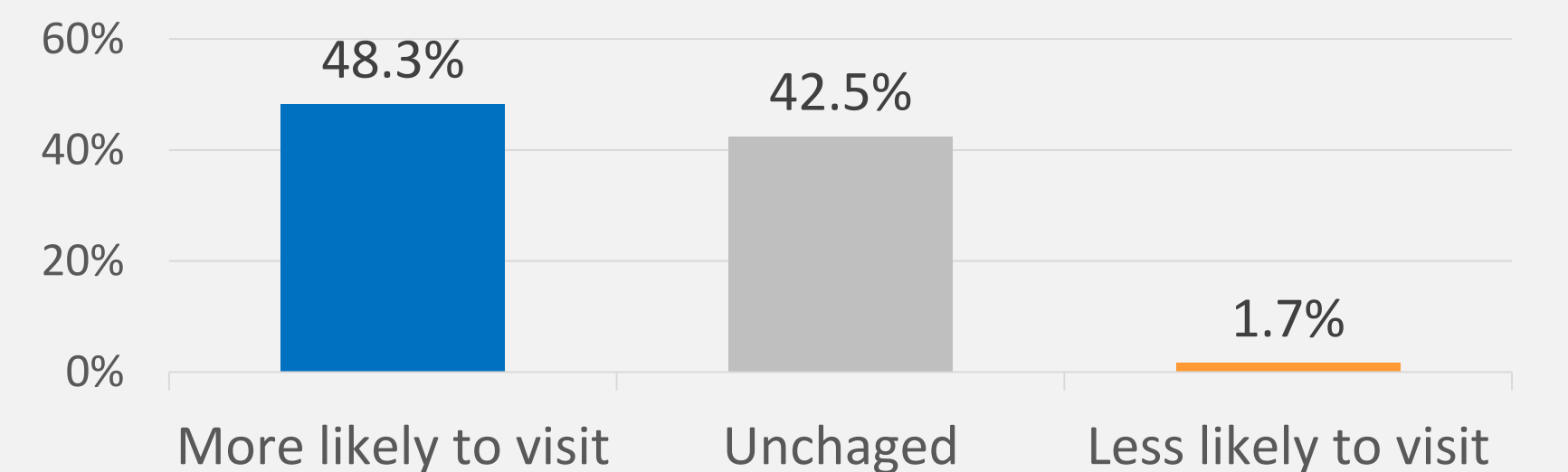
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



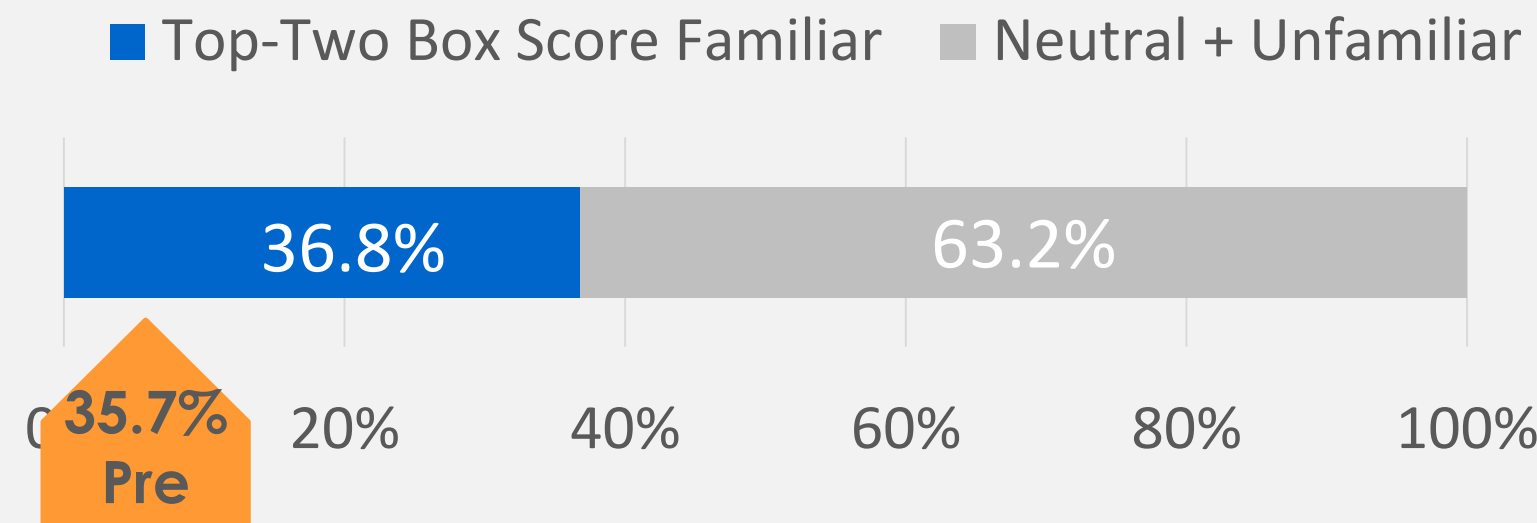
## Ads' Affect on Likelihood to Visit MD



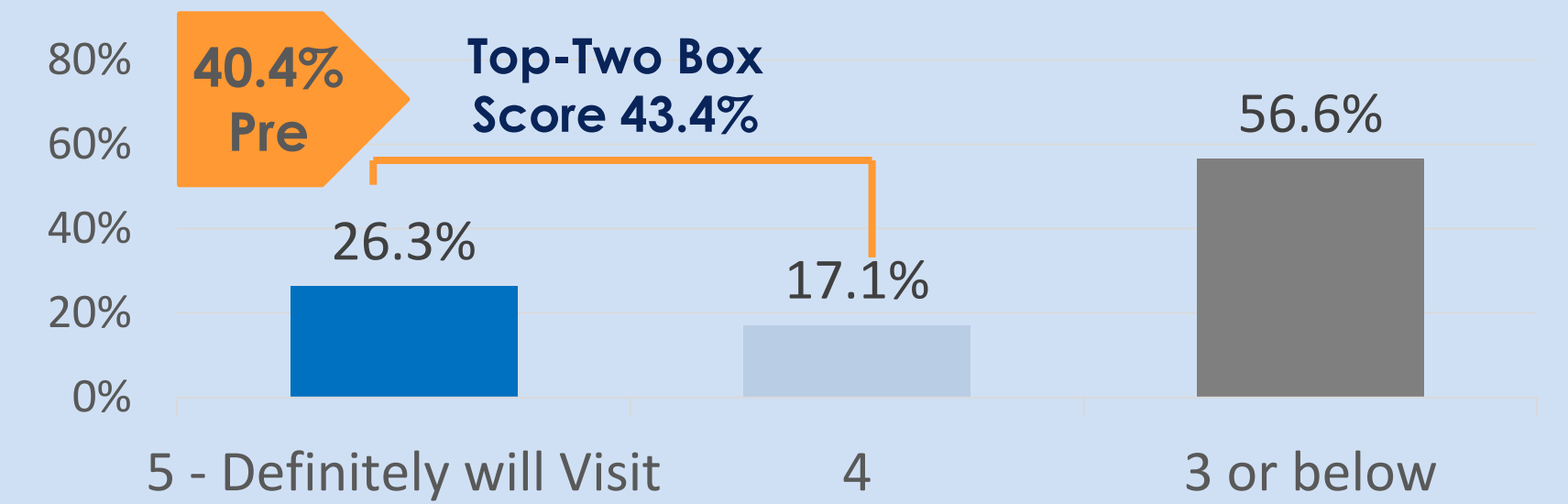


# THE LGBTQ TRAVELER

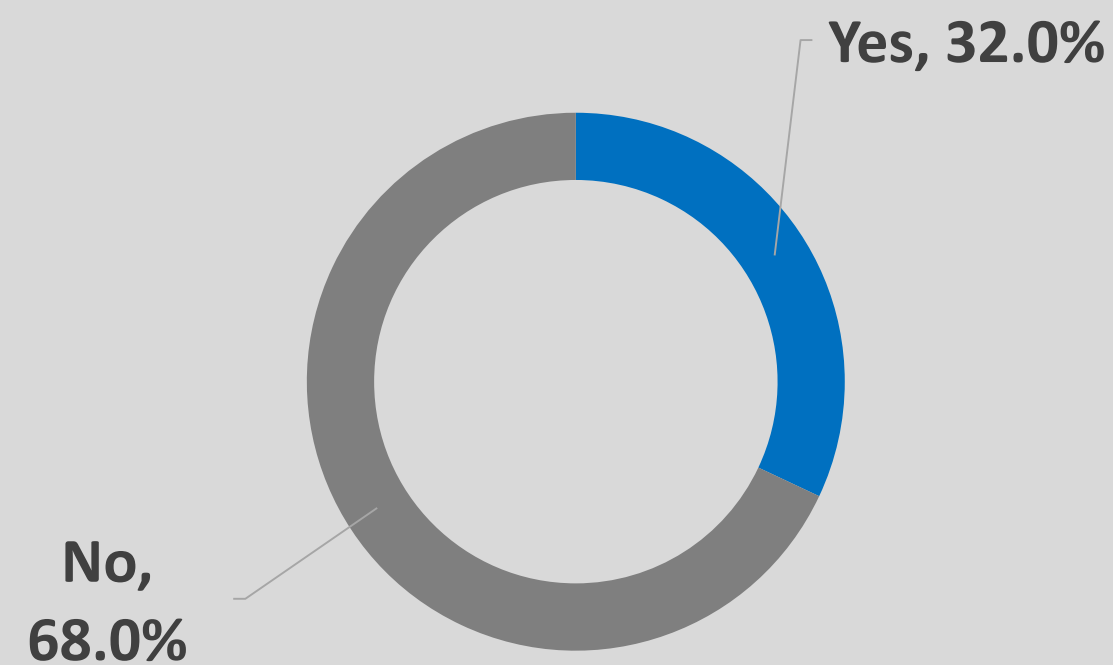
## Familiarity With Maryland



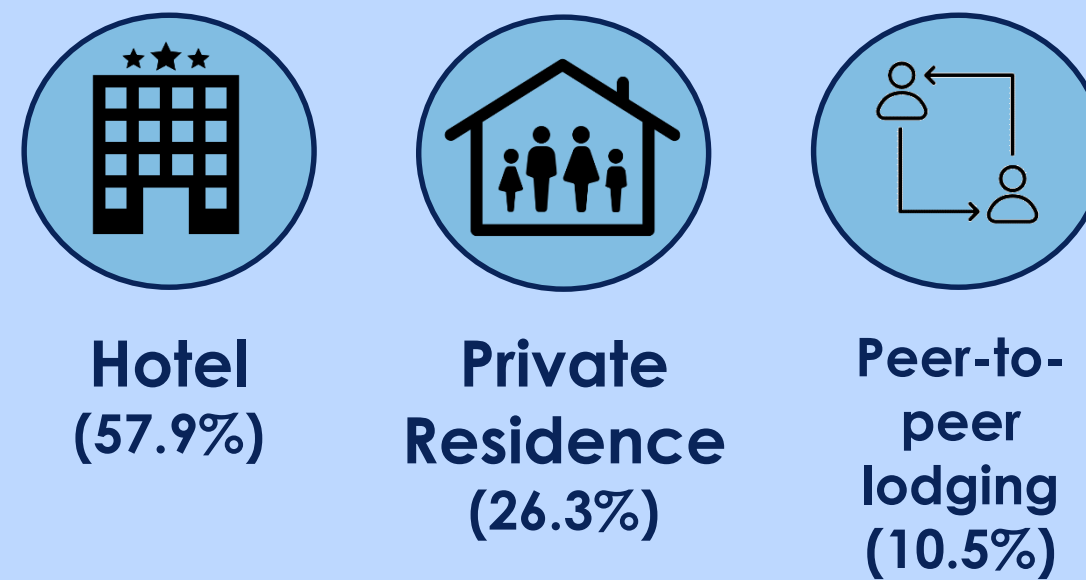
## Likelihood to Visit MD (Next 12 Months)



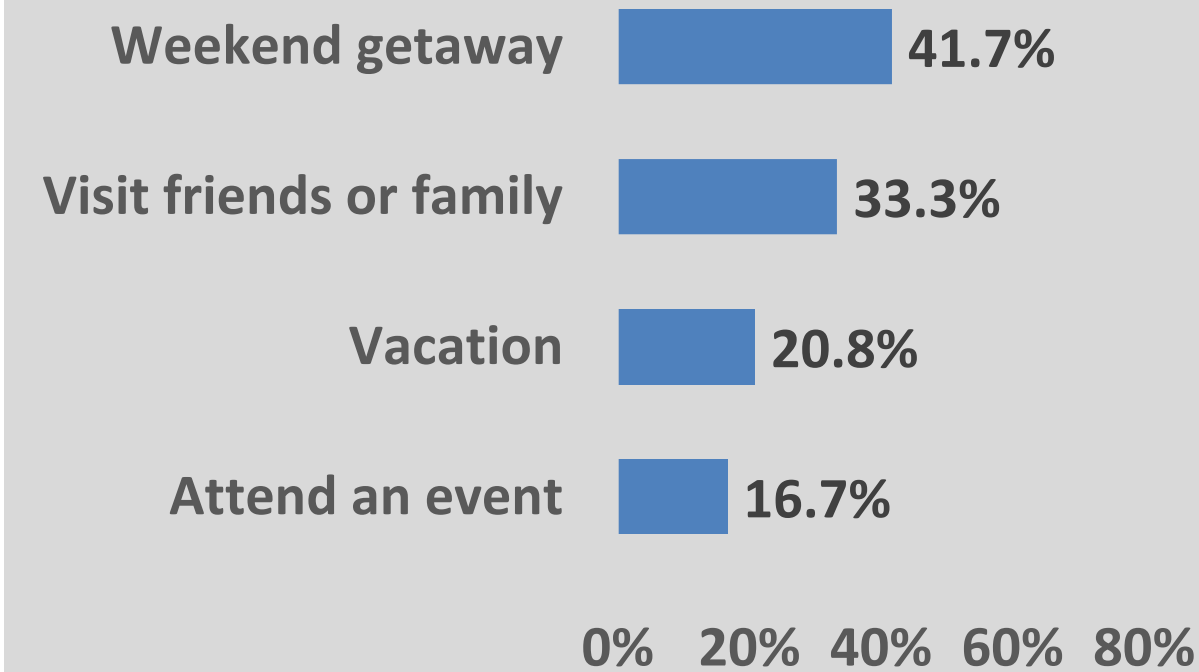
## Visited MD (Past 6 Months)



## Place of Stay in Maryland



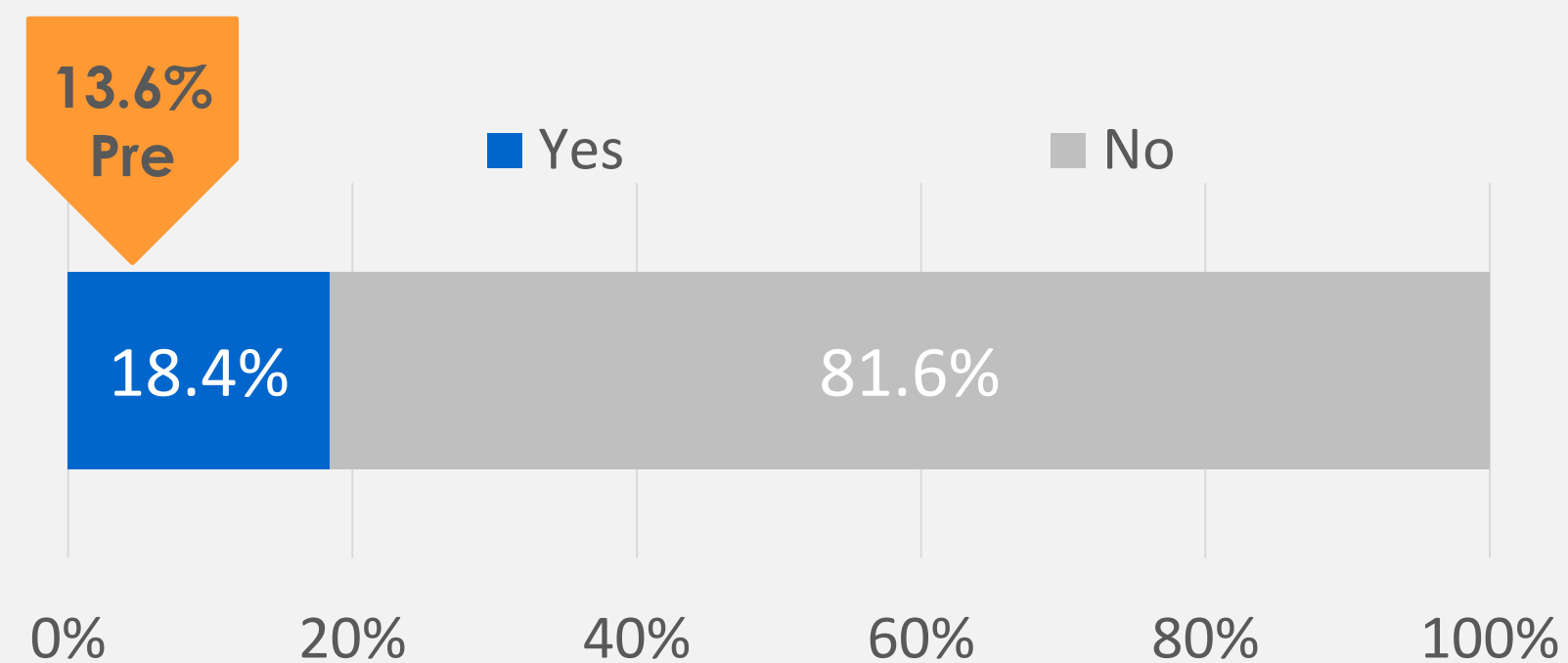
## Top Reasons for Visiting



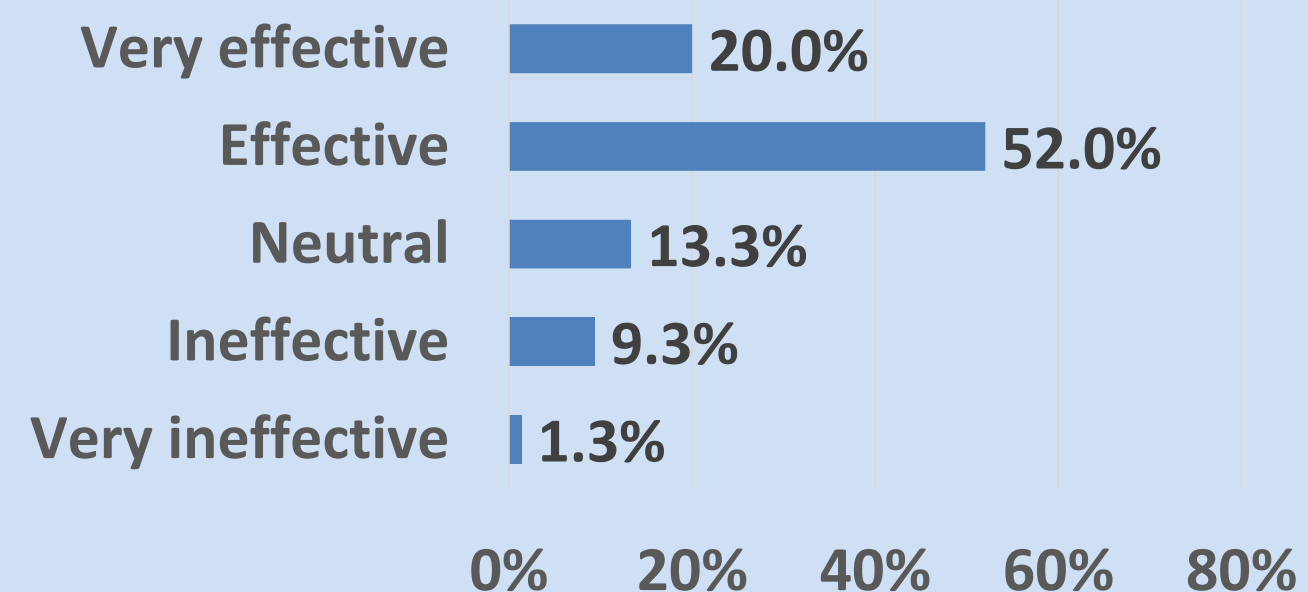
## Total In-Market Spend



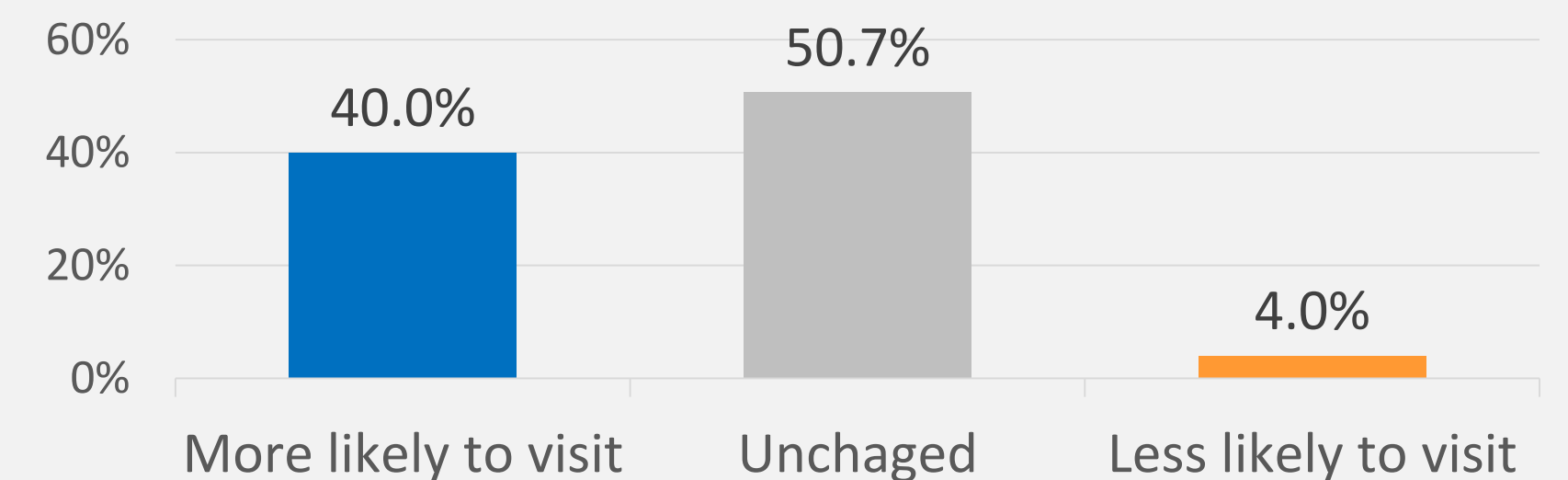
## Unaided MD Ad Recall (Past 6 Months)



## Ads' Effectiveness in portraying MD as enjoyable leisure destination



## Ads' Affect on Likelihood to Visit MD





An aerial photograph of a lakeside resort. The scene is dominated by a large body of water in the foreground and middle ground, where numerous sailboats and motorboats are docked at various piers. In the background, a dense forest of trees with autumn foliage surrounds a cluster of resort buildings, including several large, multi-story structures and smaller cottages. The overall atmosphere is serene and scenic, with a soft, slightly hazy light. The text 'DETAILED FINDINGS' is overlaid in the center of the image.

# DETAILED FINDINGS



# RESPONDENT PROFILE



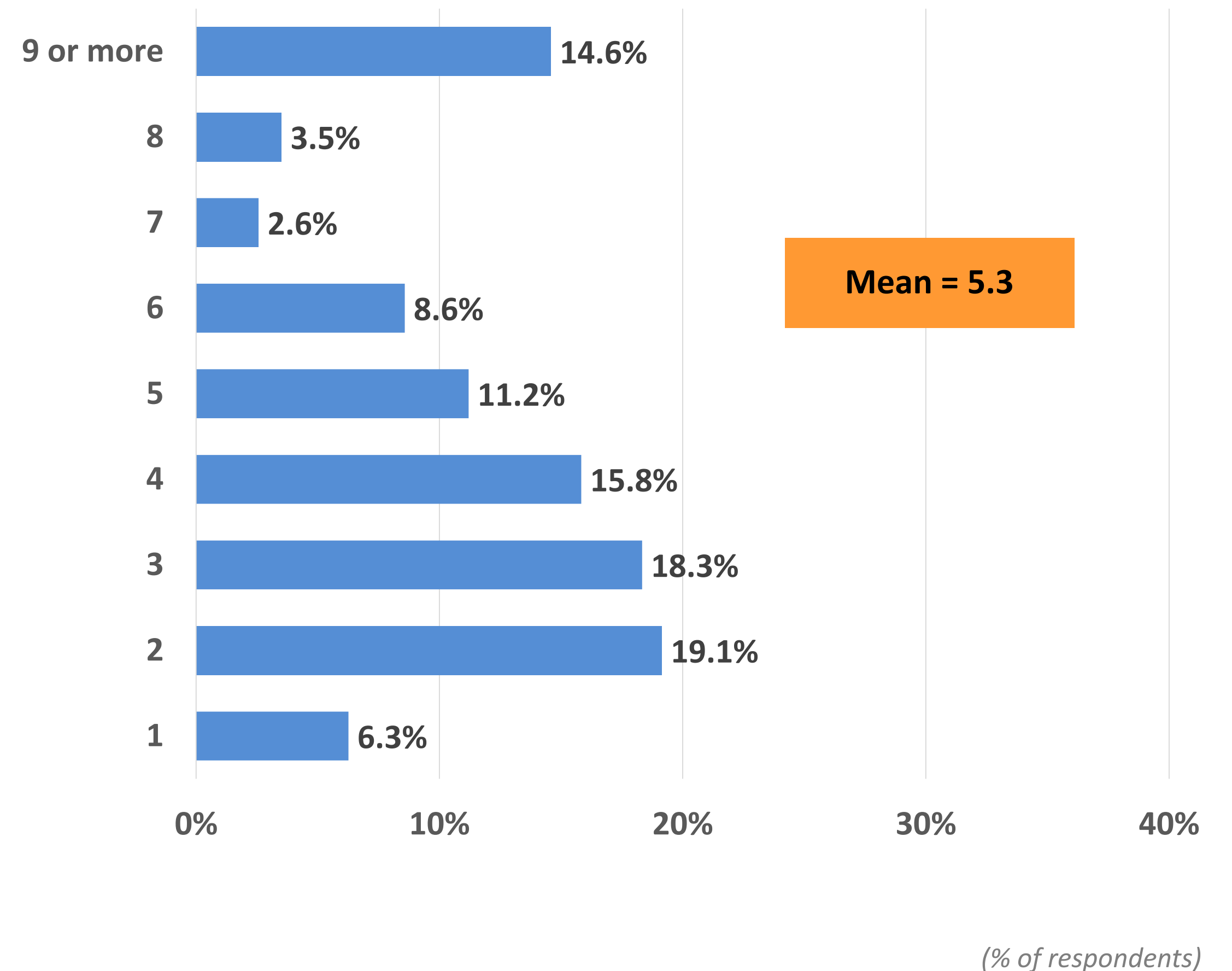
# Overnight Leisure Trips Taken in Past Year

Travelers from Maryland's key markets took an average of 5.3 overnight leisure trips in the past year. A significant proportion of this audience are even more prolific travelers having taken 9 or more such trips in the last year (14.6%).

*Note: Respondents who had not taken at least one overnight trip in the past year were screened out and did not complete the survey.*

Question: In the past 12 months, how many overnight leisure trips have you taken? Please include only OVERNIGHT trips of 50 miles or more (one way) from your home.  
Base: All respondents. 1,600 responses.

Figure 1: Overnight Leisure Trips Taken in Past Year

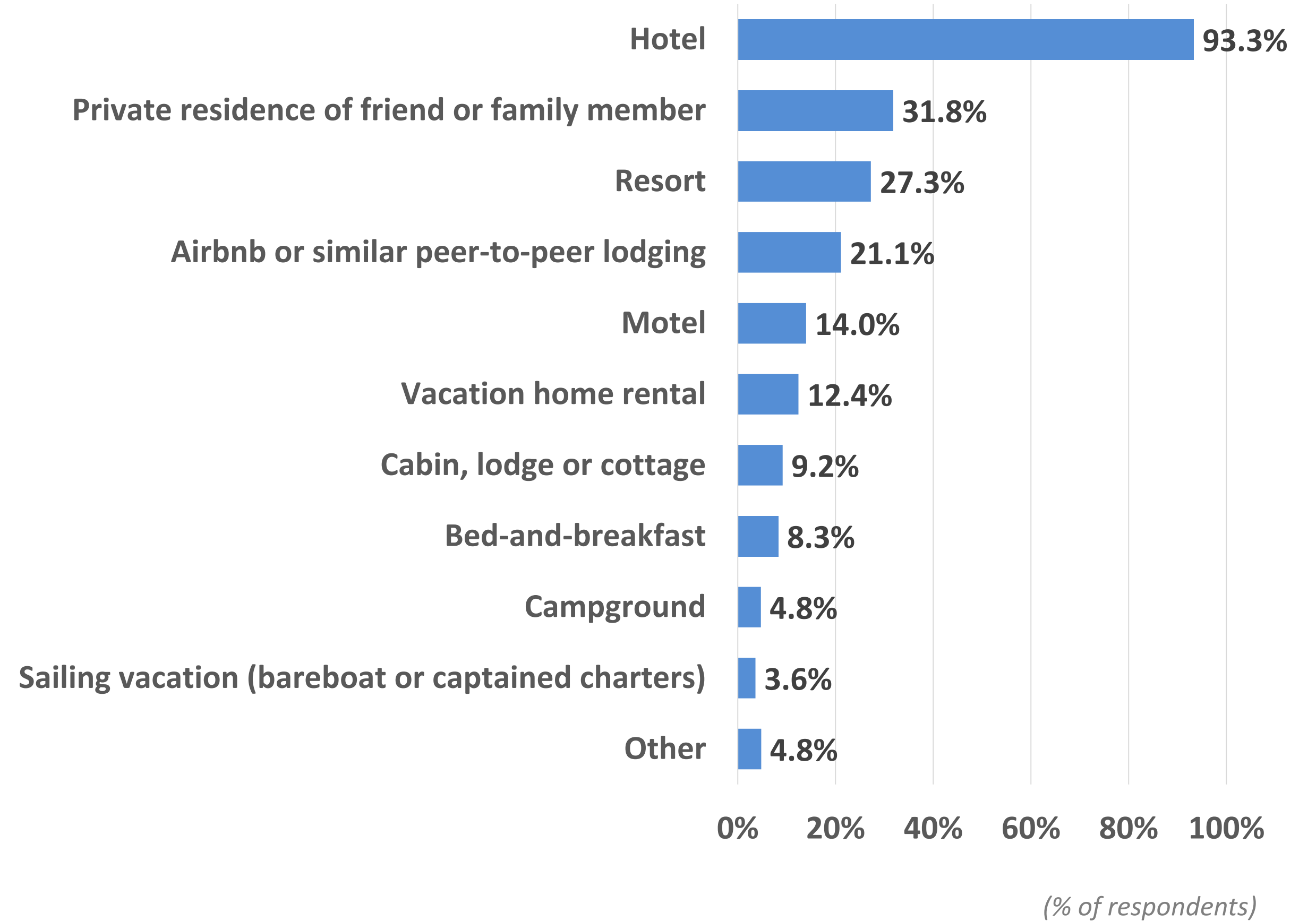




# Accommodations Used for Past Overnight Trips

Travelers from key markets most commonly stayed in a hotel on past overnight leisure trips. In fact, 93.3 percent of respondents stayed overnight in a hotel in the past year on one or more overnight leisure trips. The next most common places of stay for this audience include the private home of a friend or family member (31.8%), resort (27.3%) and peer-to-peer lodging (21.1%).

Figure 2: Accommodations Used for Past Overnight Trips



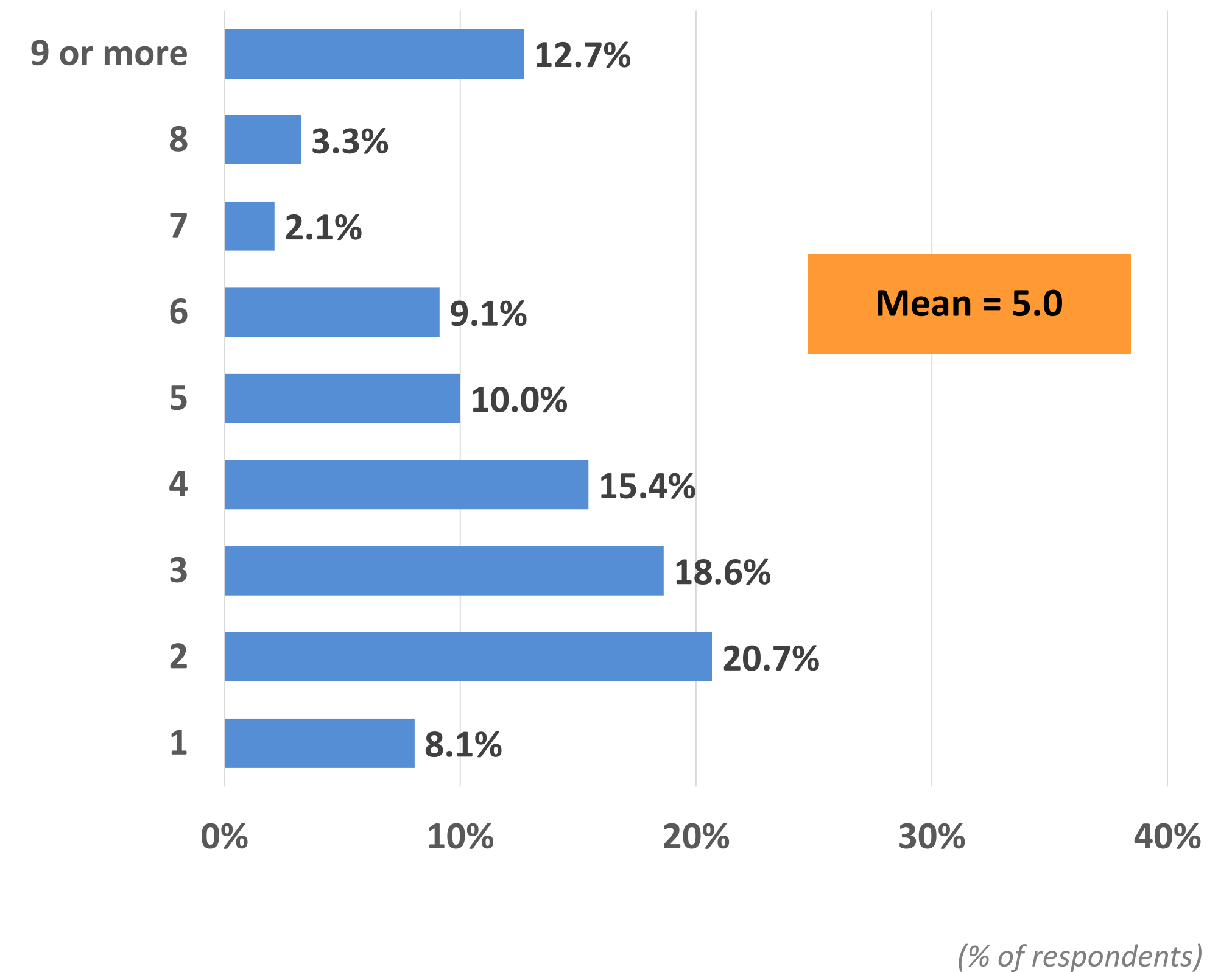
Question: Which type(s) of accommodations did you stay in on these overnight leisure trips? (Select all that apply) Base: All respondents. 1,600 responses.



# Anticipated Overnight Trips in the Next Year

**Future overnight travel sentiment remains strong.** Travelers from Maryland's key markets anticipate taking approximately the same number of overnight leisure trips in the upcoming year as they did in the past year (5.0 and 5.3, respectively).

**Figure 3: Anticipated Overnight Trips in the Next Year**



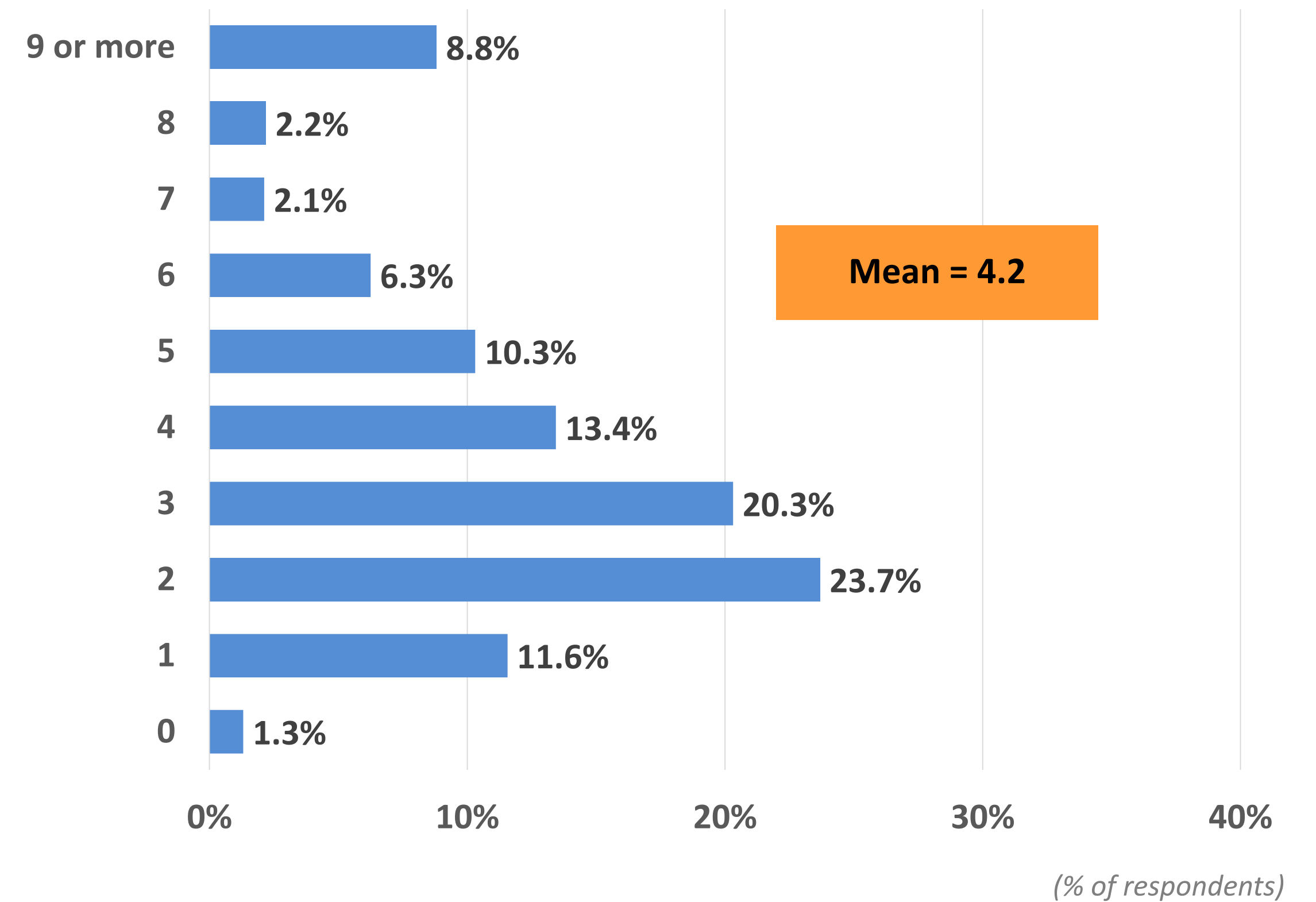
Question: In the next 12 months, how many overnight leisure trips do you plan to take?  
Please include only OVERNIGHT trips of 50 miles or more (one way) from your home.  
Base: All respondents. 1,600 responses.



# Anticipated Overnight Trips to Out-of-State Destinations in the Next Year

A majority of the anticipated overnight trips these travelers plan to take will be to destinations outside their home state. On average, respondents anticipate taking 4.2 of their 5.0 overnight leisure trips in the next year to destinations outside their primary state of residence.

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



Question: How many of these overnight leisure trips will be to destinations outside your primary state of residence? Base: All respondents. 1,600 responses.



# MARYLAND'S COMPETITIVE SITUATION



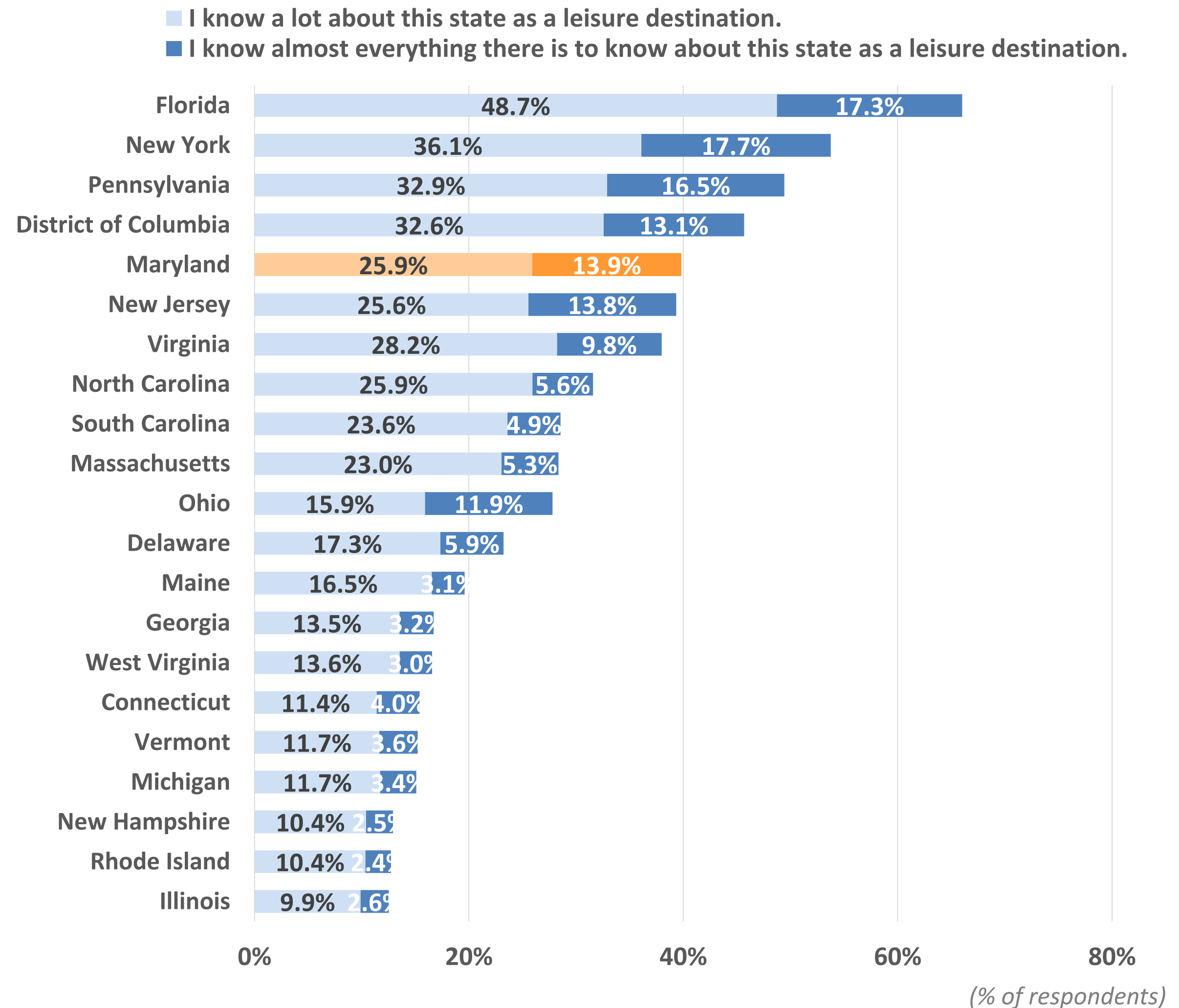
# Familiarity with Leisure Travel Destination

**Familiarity with Maryland’s leisure destination brand is moderate amongst travelers from key markets.** Two-in-five travelers (39.8%) surveyed said they “know a lot about the state” or they “know almost everything there is to know” about the state as a leisure destination. Similar to the pre-campaign survey findings, travelers’ familiarity with Maryland was only surpassed by their familiarity with Florida (66.0%), New York (53.8%), Pennsylvania (49.4%), and Washington, DC (45.7%).

However, when looking at these results amongst ad-exposed travelers (i.e. those who recalled one or more Maryland ads tested—see pages 68-69) familiarity with the state is significantly higher. In total, 58.4 percent of this group said they know a lot or almost everything there is to know about the state as a leisure destination.

Question: How much do you know about each of the following as a destination for leisure travel? Base: All respondents. 1,600 responses.

**Figure 5: Familiarity with Leisure Travel Destination**





# Familiarity with Leisure Travel Destination (Full Rating Detail)

	Top 2 Box	I know almost everything there is to know about this state as a leisure destination.	I know a lot about this state as a leisure destination.	I know some things about this state as a leisure destination.	I know very little about this state as a leisure destination.	I know nothing at all about this state as a leisure destination.
Florida	66.0%	17.3%	48.7%	26.5%	6.1%	1.4%
New York	53.8%	17.7%	36.1%	34.0%	9.3%	3.0%
Pennsylvania	49.4%	16.5%	32.9%	32.5%	14.6%	3.5%
District of Columbia	45.7%	13.1%	32.6%	30.4%	15.3%	8.6%
Maryland	39.8%	13.9%	25.9%	31.9%	19.6%	8.6%
New Jersey	39.3%	13.8%	25.6%	31.1%	20.4%	9.1%
Virginia	38.0%	9.8%	28.2%	38.2%	17.4%	6.4%
North Carolina	31.6%	5.6%	25.9%	39.9%	21.4%	7.1%
South Carolina	28.6%	4.9%	23.6%	38.6%	24.5%	8.4%
Massachusetts	28.4%	5.3%	23.0%	33.3%	24.6%	13.7%
Ohio	27.8%	11.9%	15.9%	20.4%	27.6%	24.3%
Delaware	23.2%	5.9%	17.3%	29.6%	28.7%	18.5%
Maine	19.6%	3.1%	16.5%	34.1%	28.6%	17.7%
Georgia	16.7%	3.2%	13.5%	37.2%	32.2%	13.9%
West Virginia	16.6%	3.0%	13.6%	29.2%	31.5%	22.8%
Connecticut	15.4%	4.0%	11.4%	30.4%	33.8%	20.4%
Vermont	15.2%	3.6%	11.7%	31.0%	31.6%	22.2%
Michigan	15.1%	3.4%	11.7%	24.0%	34.6%	26.3%
New Hampshire	12.9%	2.5%	10.4%	25.0%	34.3%	27.8%
Rhode Island	12.7%	2.4%	10.4%	26.7%	33.2%	27.4%
Illinois	12.5%	2.6%	9.9%	26.6%	33.2%	27.7%

Question: How much do you know about each of the following as a destination for leisure travel? Base: All respondents. 1,600 responses.



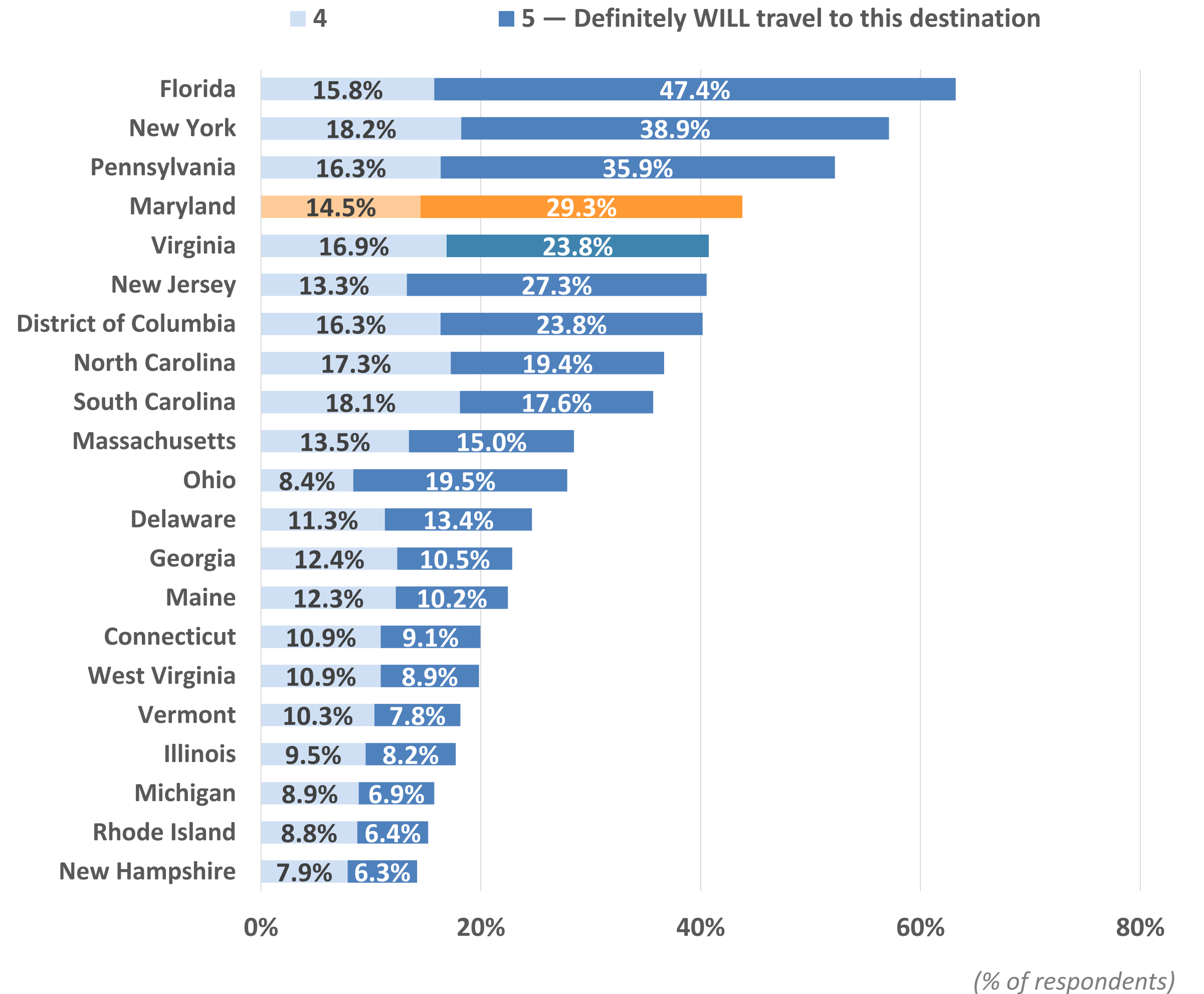
# Likelihood to Visit in the Next Year

Three-in-ten travelers from key markets surveyed said they will visit **Maryland in the next year**. In total, 29.3 percent of respondents said they definitely will visit the state in the upcoming year, up from 25.6 percent who said the same in the pre-campaign survey.

Full rating detail on all destinations tested is presented on the following page.

Question: On a five-point scale, where “1” represents “Definitely will NOT visit” and “5” represents “Definitely WILL visit,” what is the likelihood that you will visit each of the following in the next year? Base: All respondents. 1,600 responses.

Figure 6: Likelihood to Visit in the Next Year





# Likelihood to Visit in the Next Year (Full Rating Detail)

	Top 2 Box	5 — Definitely WILL travel to this destination	4	3—May or may not travel to this destination	2	1 — Definitely will NOT travel to this destination
Florida	63.2%	47.4%	15.8%	22.8%	6.4%	7.6%
New York	57.1%	38.9%	18.2%	25.7%	7.4%	9.8%
Pennsylvania	52.2%	35.9%	16.3%	29.9%	9.5%	8.5%
Maryland	43.8%	29.3%	14.5%	29.5%	13.1%	13.6%
Virginia	40.7%	23.8%	16.9%	34.5%	12.1%	12.6%
New Jersey	40.6%	27.3%	13.3%	27.8%	14.5%	17.1%
District of Columbia	40.2%	23.8%	16.3%	30.4%	13.6%	15.8%
North Carolina	36.7%	19.4%	17.3%	35.6%	14.5%	13.2%
South Carolina	35.7%	17.6%	18.1%	32.7%	15.6%	16.0%
Massachusetts	28.5%	15.0%	13.5%	32.7%	16.9%	22.0%
Ohio	27.9%	19.5%	8.4%	23.2%	19.1%	29.8%
Delaware	24.7%	13.4%	11.3%	31.7%	19.8%	23.9%
Georgia	22.9%	10.5%	12.4%	34.2%	19.6%	23.4%
Maine	22.5%	10.2%	12.3%	32.0%	18.6%	27.0%
Connecticut	20.0%	9.1%	10.9%	28.5%	23.3%	28.2%
West Virginia	19.8%	8.9%	10.9%	29.5%	21.2%	29.5%
Vermont	18.1%	7.8%	10.3%	31.3%	21.0%	29.5%
Illinois	17.7%	8.2%	9.5%	26.4%	21.5%	34.3%
Michigan	15.8%	6.9%	8.9%	27.6%	21.5%	35.1%
Rhode Island	15.2%	6.4%	8.8%	28.2%	23.4%	33.2%
New Hampshire	14.2%	6.3%	7.9%	29.0%	25.4%	31.4%

Question: On a five-point scale, where “1” represents “Definitely will NOT visit” and “5” represents “Definitely WILL visit,” what is the likelihood that you will visit each of the following in the next year? Base: All respondents. 1,600 responses.

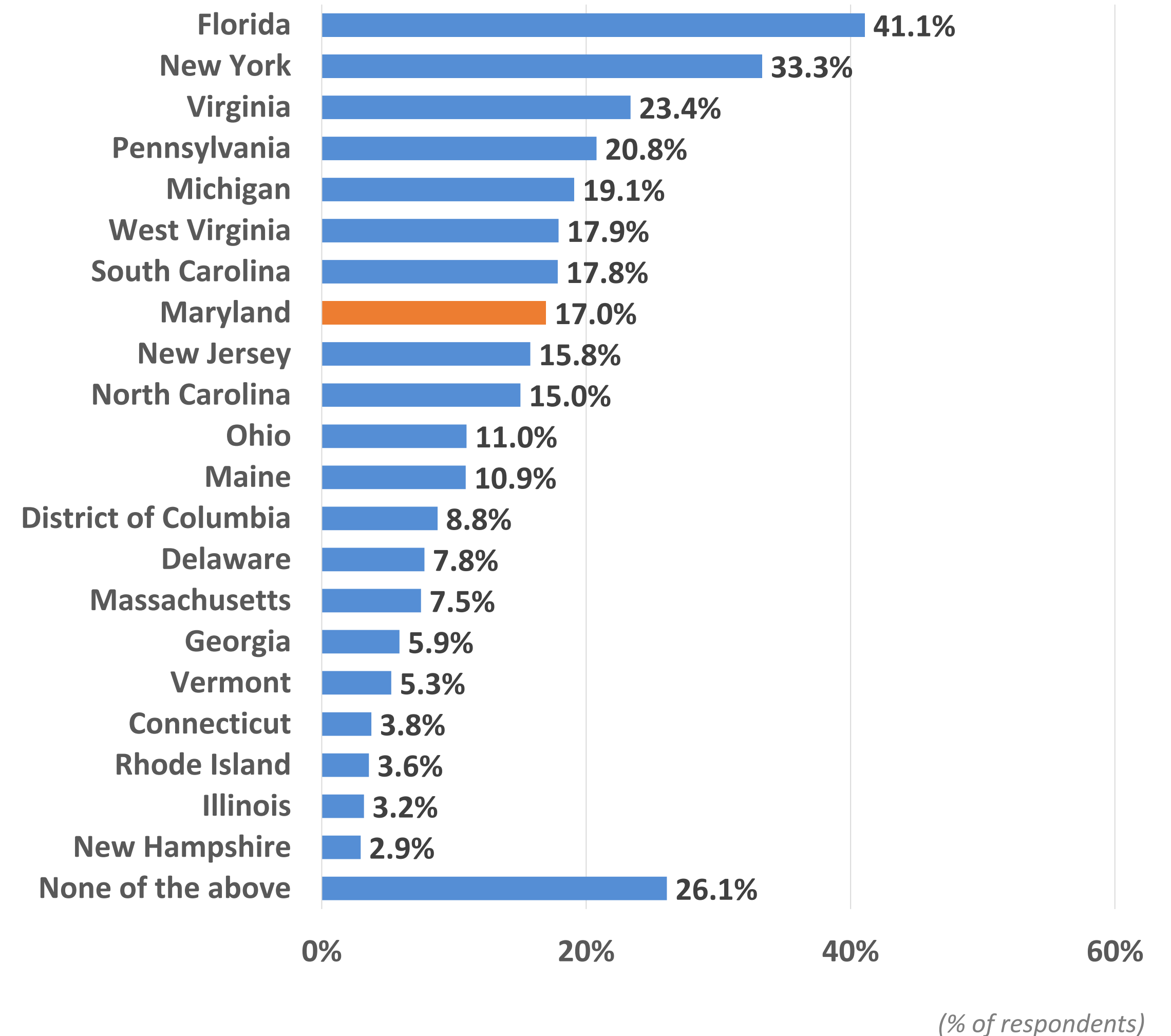


# Advertising Recall (Past 6 Months)—Unaided

Travel-related advertising recall for Maryland post-campaign increased compared to pre-campaign findings. Fully, 17.0 percent of respondents said they recalled seeing travel advertisements for Maryland in the past six months, up from 13.9 percent who said the same in the pre-campaign survey findings.

Question: Which of the following have you seen or heard travel-related advertising for in the past three to six months? (Select all that apply) Base: All respondents. 1,600 responses.

Figure 7: Advertising Recall (Past 6 Months)—Unaided

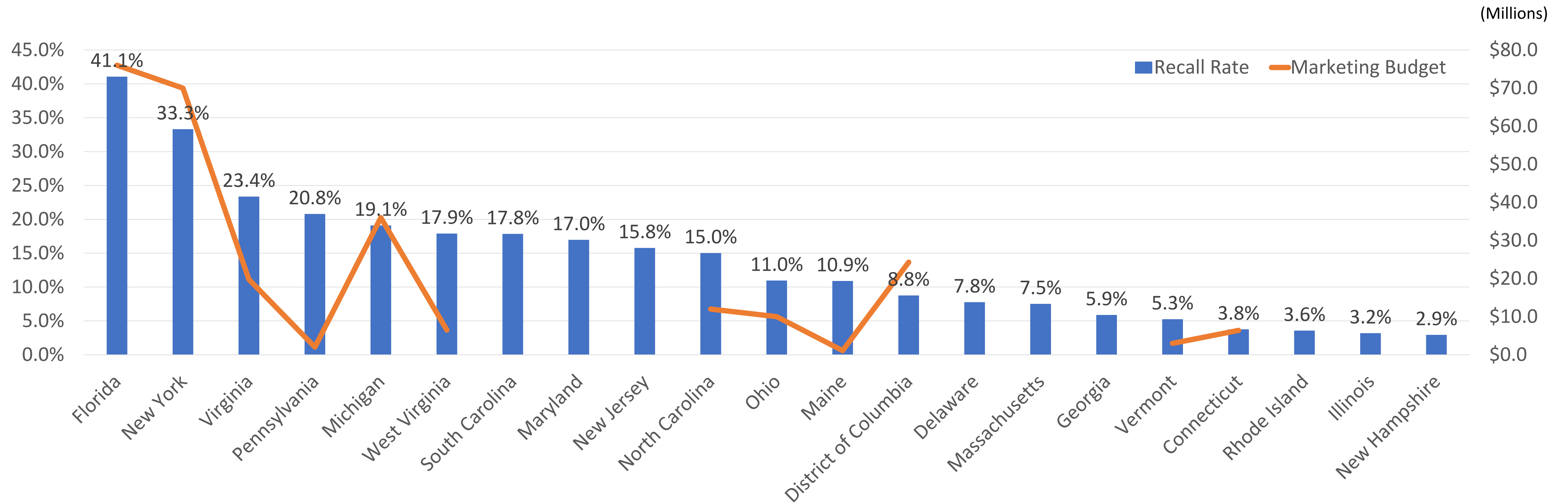




# Advertising Recall (Past 6 Months) vs. Tourism Marketing Budget

Chart below maps unaided advertising recall rates against state tourism budgets. Note tourism marketing budgets were not found

Figure 7b: Advertising Recall (Past 6 Months) vs. Tourism Marketing Budget



Question: Which of the following have you seen or heard travel-related advertising for in the past three to six months? (Select all that apply) Base: All respondents. 1,600 responses.



# THE MARYLAND DESTINATION BRAND



# Top-of-Mind East Coast Destinations with Maryland's Attributes (Unaided)

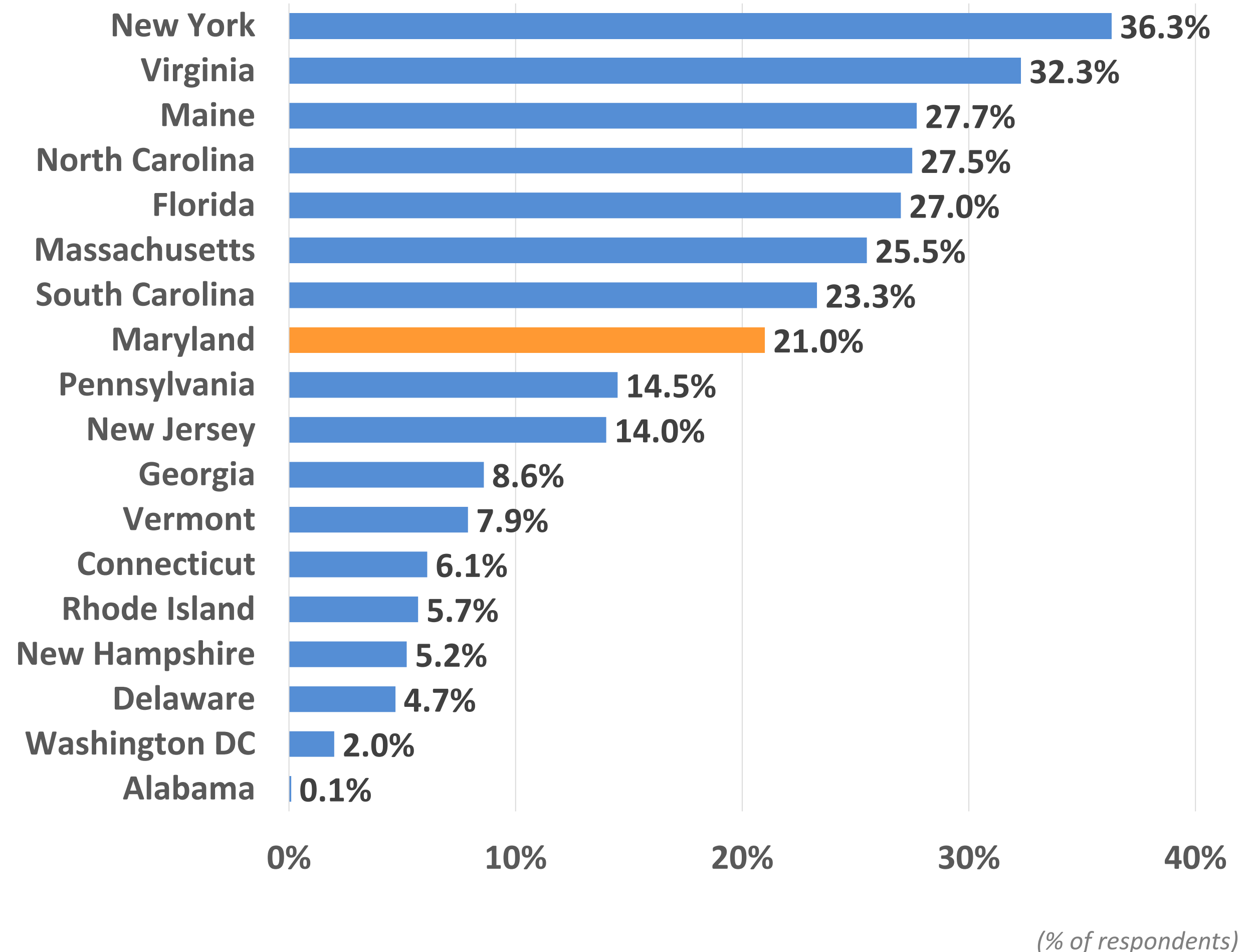
Maryland faces significant competition as a top-of-mind east coast destination that offers abundant land/water-based outdoor activities, varied landscapes, diverse culinary scene, rich history and welcoming culture. To assess Maryland's competitive environment, survey respondents were asked to think about destinations within the east coast region that feature specific core attributes of Maryland's destination brand. Respondents listed—in an open-ended format—the first three destinations that came to mind which fit these attributes. The table on the right shows the top destinations listed. Maryland was again the 8<sup>th</sup> most written-in destination at 21.0 percent, comparable to findings in the pre-campaign survey findings (22.6%).

Ad-exposed travelers (e.g. those who recalled one or more of the Maryland ads tested) were more likely than those who did not recall seeing the ads to have written in Maryland as a top-of-mind destination (28.0% vs. 19.6% for non-ad exposed travelers).

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

Base: All respondents. 1,575 responses.

Figure 8: Top-of-Mind East Coast Destinations with Maryland's Attributes (Unaided)



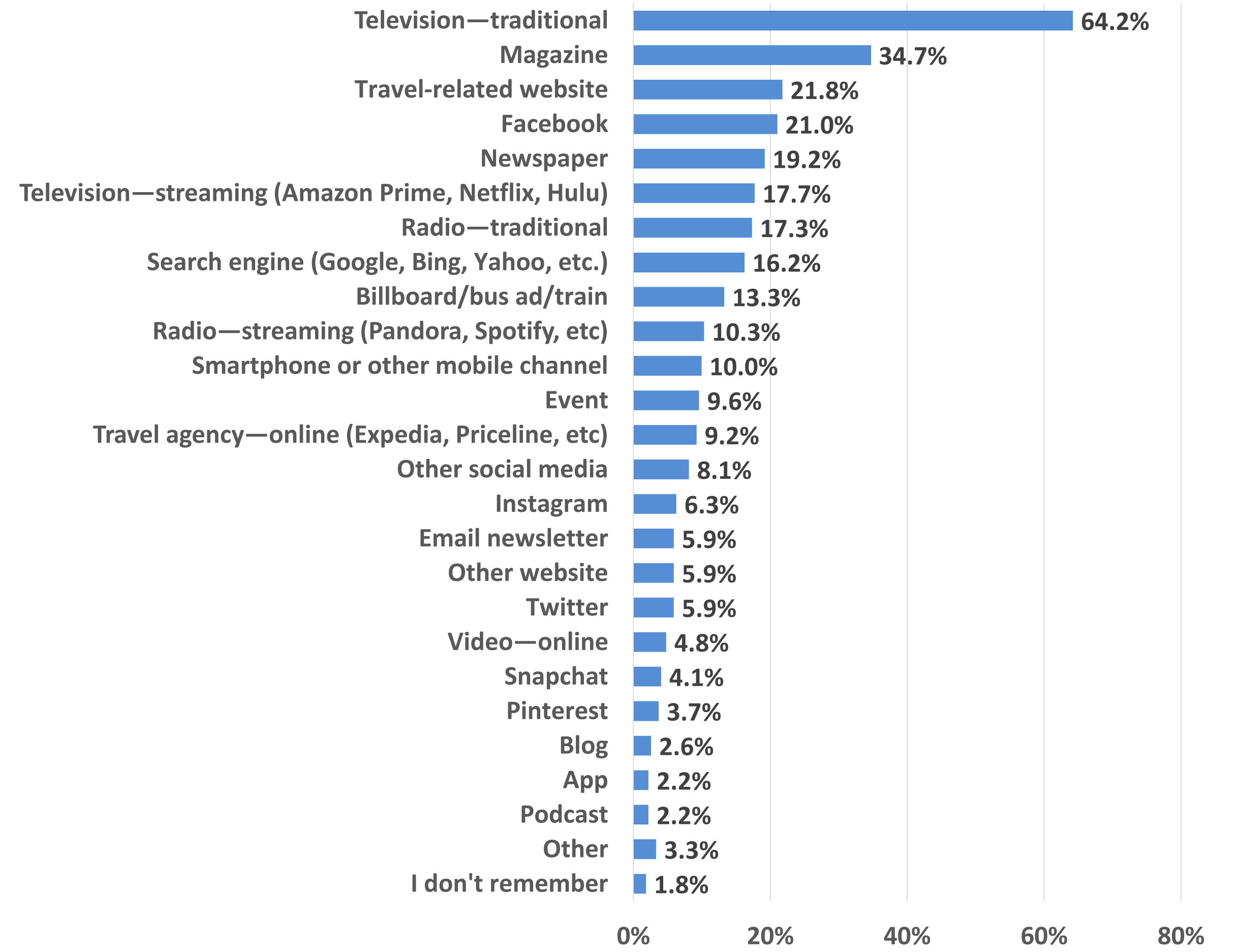
# Maryland Ad Recall: Advertising Medium

**Traditional television was the most common medium in which Maryland advertising was recalled.** Travelers who said they had seen or heard ads for Maryland in the past six months were asked where they saw this advertising. After the campaign’s launch, nearly two-thirds of this group (64.2%) said they had seen ads for the state on traditional television. This is up significantly from 50.8 percent who said the same prior to the state’s advertising campaign going live.

The next-most common mediums Maryland’s advertising was recalled in include magazines (34.7%), travel-related websites (21.8%) and Facebook (21.0%)—all of which were comparable to pre-campaign findings.

Question: In the previous question, you indicated that you have recently seen or heard advertising for Maryland. Where did you see or hear this advertising? Base: Respondents who said they recalled seeing or hearing travel-related advertisements for Maryland in past 6 months. 271 responses.

**Figure 9: Maryland Ad Recall—Advertising Medium**



(% of respondents)

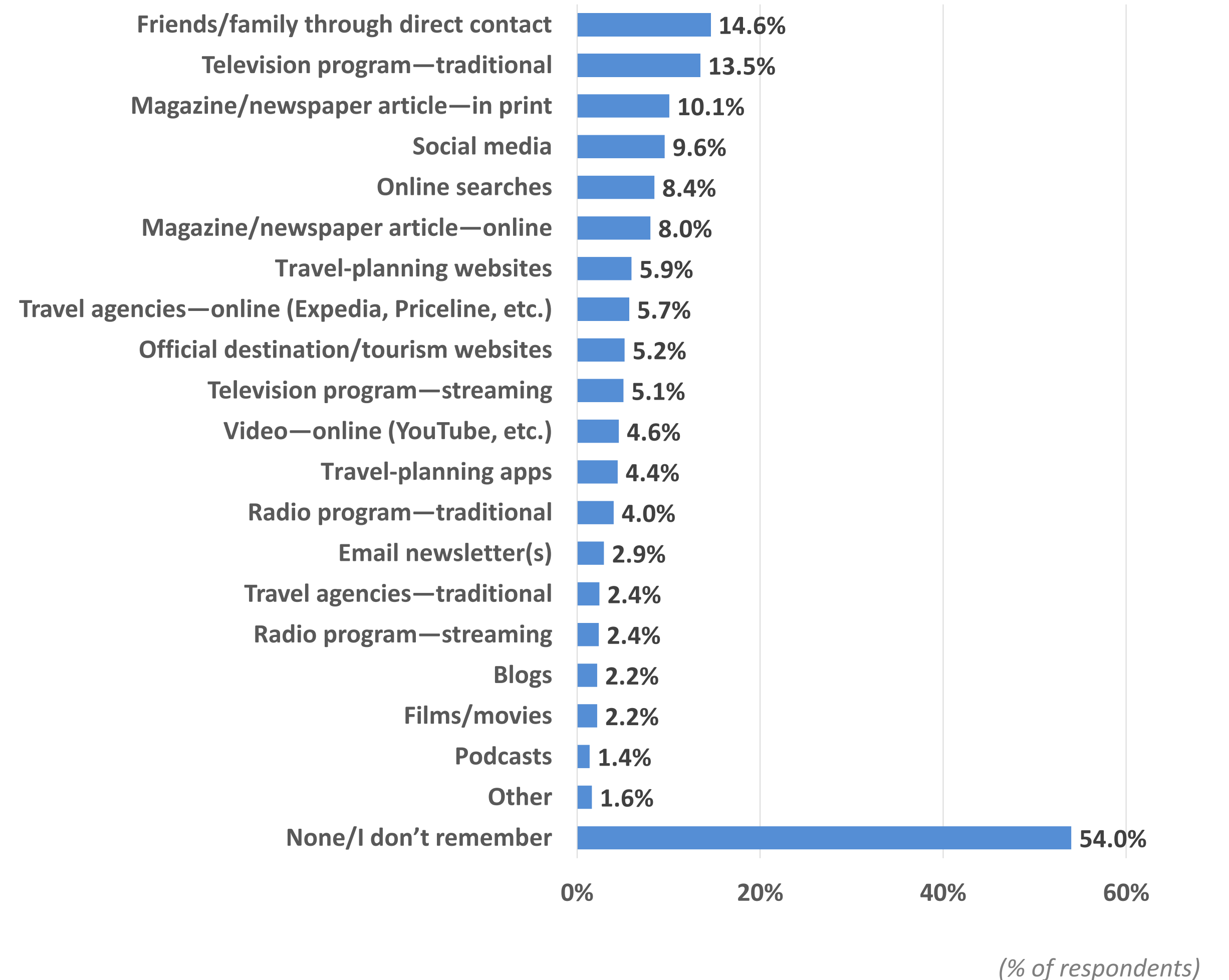


# Earned Media Recall

Just under half of this audience recalled some form of earned media for Maryland as a travel destination. In total, 46.0 percent of respondents said they recalled seeing/hearing/reading about the state of Maryland as a travel destination. This is up from 40.3 percent who said the same prior to the 2019 advertising campaign’s launch.

Question: Other than advertising, do you recall recently seeing, hearing and/or reading about the state of Maryland as a travel destination in any of the following? (Select all that apply) Base: All respondents. 1,600 responses.

Figure 10: Earned Media Recall



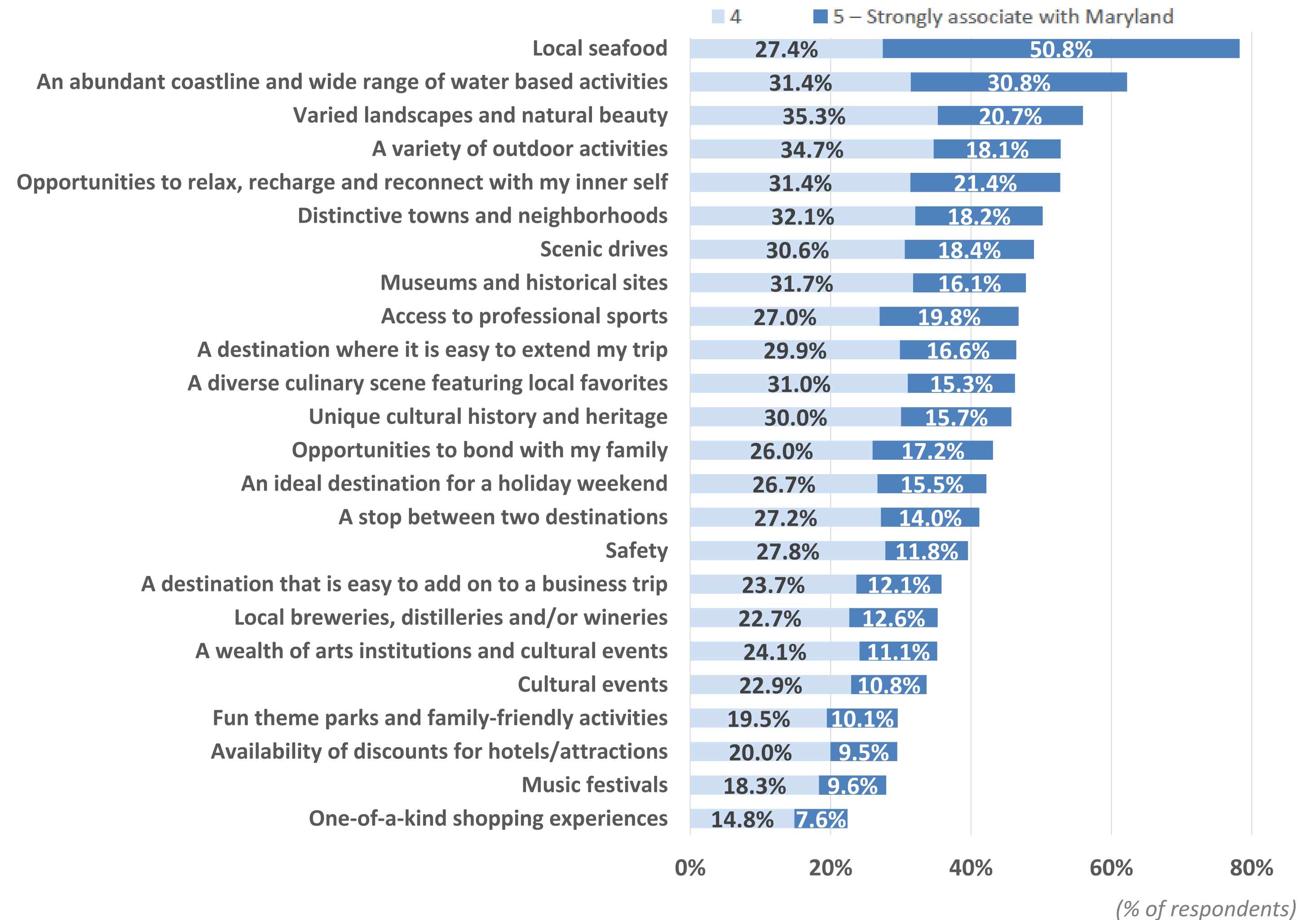
# Maryland Destination Attribute Association Rating

Maryland continues to be most strongly associated with local seafood and an abundant coastline, beaches, and wide range of freshwater and salt-water based activities. Four-in-five travelers surveyed strongly associate Maryland with local seafood (79.3%) while three-in-five associate the state with an abundant coastline with water-based activities (62.2%).

Many of the destination attributes associated with Maryland stayed the same pre and post campaign. However, there were some notable differences. Compared to the pre-campaign results, travelers from key markets were slightly more likely to associate Maryland with music festivals (22.3% vs. 27.9%), access to professional sports (41.5% vs. 46.8%), fun theme parks/family friendly activities (25.1% vs. 29.6%) and local breweries/distilleries/wineries (31.0% vs. 25.3%) after the advertising campaign went live (see next page).

Question: Please rate Maryland for each of the following attributes using the five-point scale below, in which “1” represents “Do not associate at all with Maryland” and “5” represents “Strongly associate with Maryland.”  
Base: All respondents. 1,600 responses.

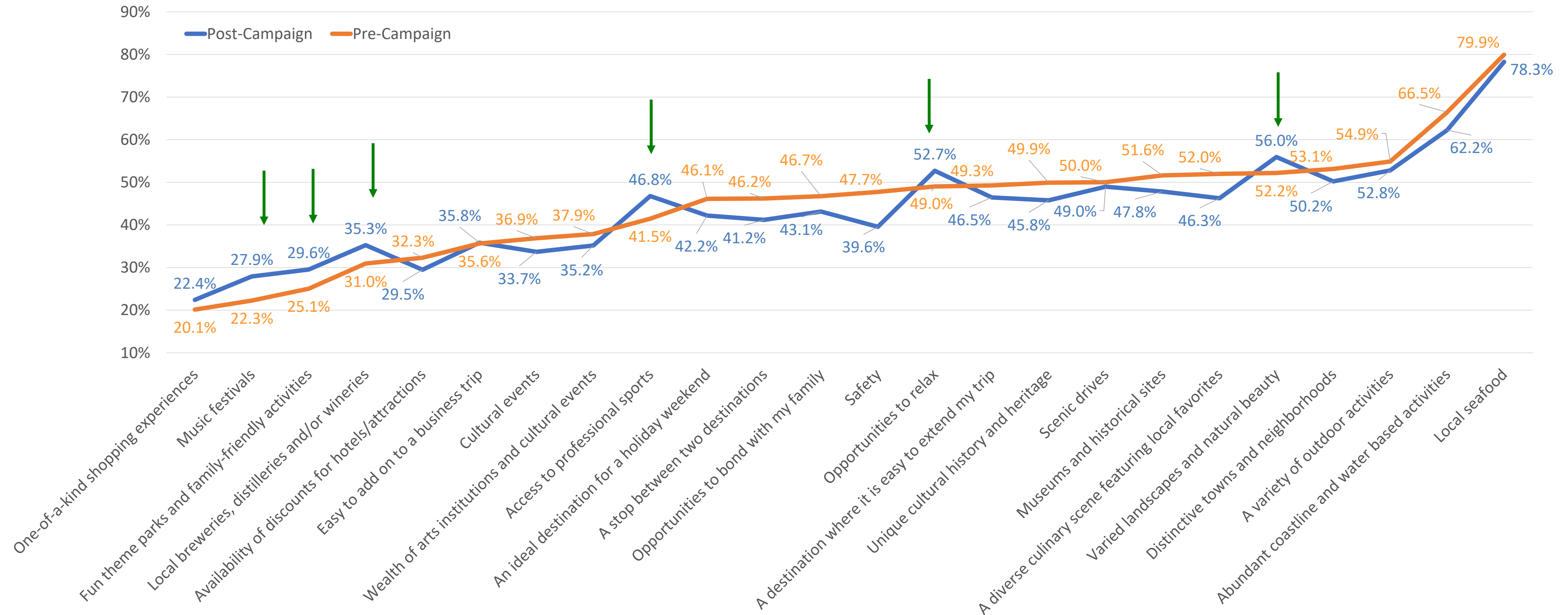
Figure 11a: Maryland Destination Attribute Association Rating—Top Two Box Score





# Maryland Destination Attribute Association Rating: Pre vs. Post Campaign

Figure 11b: Maryland Destination Attribute Association Rating—Top Two Box Score (Pre vs. Post Campaign Results)



Question: Please rate Maryland for each of the following attributes using the five-point scale below, in which “1” represents “Do not associate at all with Maryland” and “5” represents “Strongly associate with Maryland.”  
 Base: All respondents. 1,600 responses.

# Maryland Destination Attribute Association Rating (Full Detail)

	Top 2 Box	5 – Strongly associate with Maryland	4	3	2	1 – Do not associate at all
Local seafood	78.3%	50.8%	27.4%	13.8%	4.8%	3.1%
An abundant coastline, beaches, and a wide range of freshwater- and salt-water based activities.	62.2%	30.8%	31.4%	24.5%	8.4%	4.9%
Varied landscapes and natural beauty	56.0%	20.7%	35.3%	29.3%	9.3%	5.5%
A variety of outdoor activities	52.8%	18.1%	34.7%	32.2%	9.1%	5.9%
Opportunities to relax, recharge and reconnect with my inner self	52.7%	21.4%	31.4%	29.5%	11.1%	6.6%
Distinctive towns and neighborhoods	50.2%	18.2%	32.1%	34.8%	9.4%	5.6%
Scenic drives	49.0%	18.4%	30.6%	32.6%	11.8%	6.6%
Museums and historical sites	47.8%	16.1%	31.7%	32.8%	11.1%	8.2%
Access to professional sports	46.8%	19.8%	27.0%	28.9%	13.6%	10.7%
A destination where it is easy to extend my trip if I decide I want to stay longer	46.5%	16.6%	29.9%	32.9%	10.6%	10.0%
A diverse culinary scene featuring local favorites	46.3%	15.3%	31.0%	34.9%	11.9%	7.0%
Unique cultural history and heritage	45.8%	15.7%	30.0%	35.2%	12.2%	6.8%
Opportunities to bond with my family and form memories for a lifetime	43.1%	17.2%	26.0%	32.4%	12.8%	11.6%
An ideal destination for a holiday weekend	42.2%	15.5%	26.7%	30.6%	14.7%	12.5%
A stop between two destinations	41.2%	14.0%	27.2%	35.8%	12.4%	10.6%
Safety	39.6%	11.8%	27.8%	38.7%	12.1%	9.6%
A destination that is easy to add on to a business trip	35.8%	12.1%	23.7%	35.4%	13.3%	15.5%
Local beer/breweries and/or spirits/distilleries and/or wines/wineries	35.3%	12.6%	22.7%	36.3%	15.3%	13.1%
A wealth of arts institutions and cultural events	35.2%	11.1%	24.1%	38.2%	14.8%	11.8%
Cultural events	33.7%	10.8%	22.9%	38.6%	16.5%	11.1%
Fun theme parks and family-friendly activities	29.6%	10.1%	19.5%	38.5%	18.8%	13.1%
Availability of package deals and discounts for hotels and attractions	29.5%	9.5%	20.0%	41.5%	15.2%	13.9%
Music festivals	27.9%	9.6%	18.3%	37.5%	18.7%	15.8%
One-of-a-kind shopping experiences	22.4%	7.6%	14.8%	36.4%	24.4%	16.7%

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

Base: All respondents. 1,600 responses.



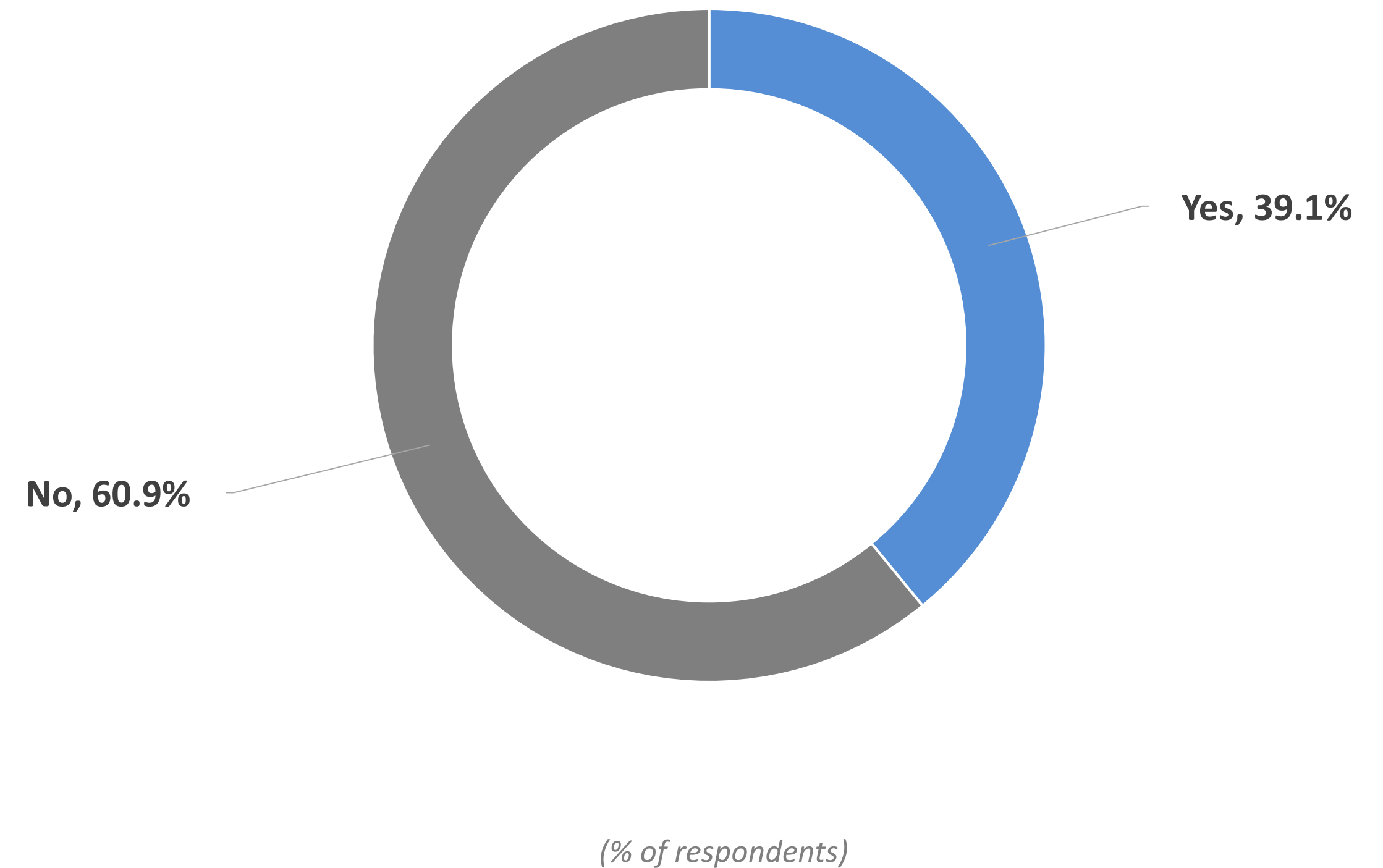
# Past Visitation to Maryland

**Two-in-five travelers surveyed from key markets have visited Maryland for leisure in the last six months.** When respondents were asked if they had traveled to (or within) Maryland for a leisure or personal trip in the past 6 months, 39.1 percent had while the remaining 60.9 percent had not.

Amongst ad-exposed travelers (e.g. those who recalled one or more of the advertisements tested—see pages 68-69) the proportion of recent visitors increases to nearly two-thirds (62.1%).

Question: Have you traveled to (or within) Maryland for a leisure or personal trip in the past 6 months? Base: All respondents. 1,600 responses.

**Figure 12: Past Visitation to Maryland**



# PROFILE OF TRAVELERS WHO HAVE NOT TAKEN A LEISURE TRIP TO MARYLAND IN PAST SIX MONTHS



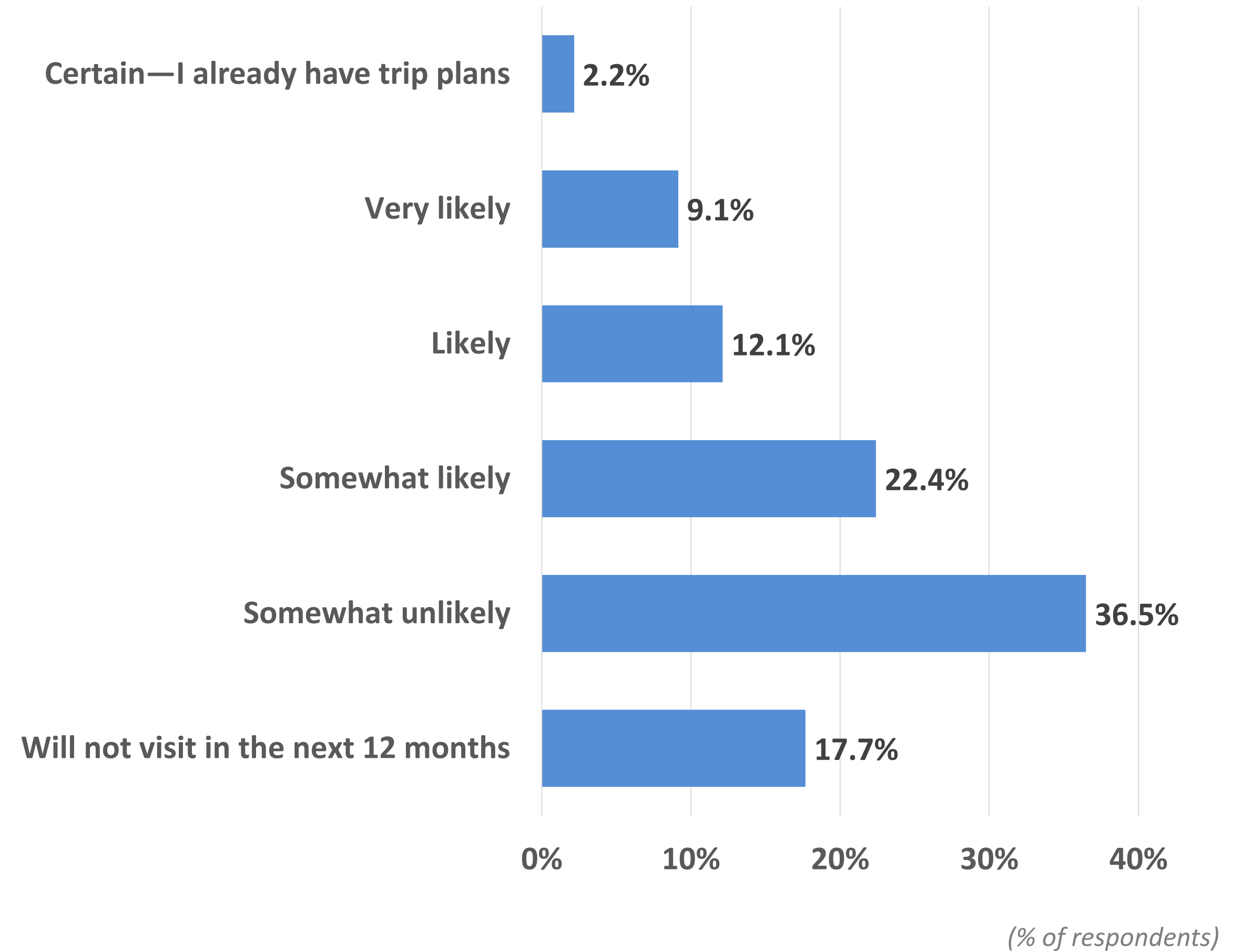
# Likelihood to Travel to Maryland

Amongst those who had not taken a leisure trip to (or within) Maryland in the last six months, only 2.2 percent were certain to travel to the state in the next year. Additionally, 21.2 percent of this group said they were “likely” (12.1%) or “very likely” (9.1%) to do so.

In contrast, 17.7 percent said they would not be visiting the state for leisure in the upcoming year and 36.5 percent said they were unlikely to do so.

Question: How likely are you to take a leisure trip to (or within) Maryland in the next 12 months? (Select one) Base: Respondents who have not visited Maryland for leisure in the past 6 months. 973 responses.

Figure 13: Likelihood to Travel to Maryland



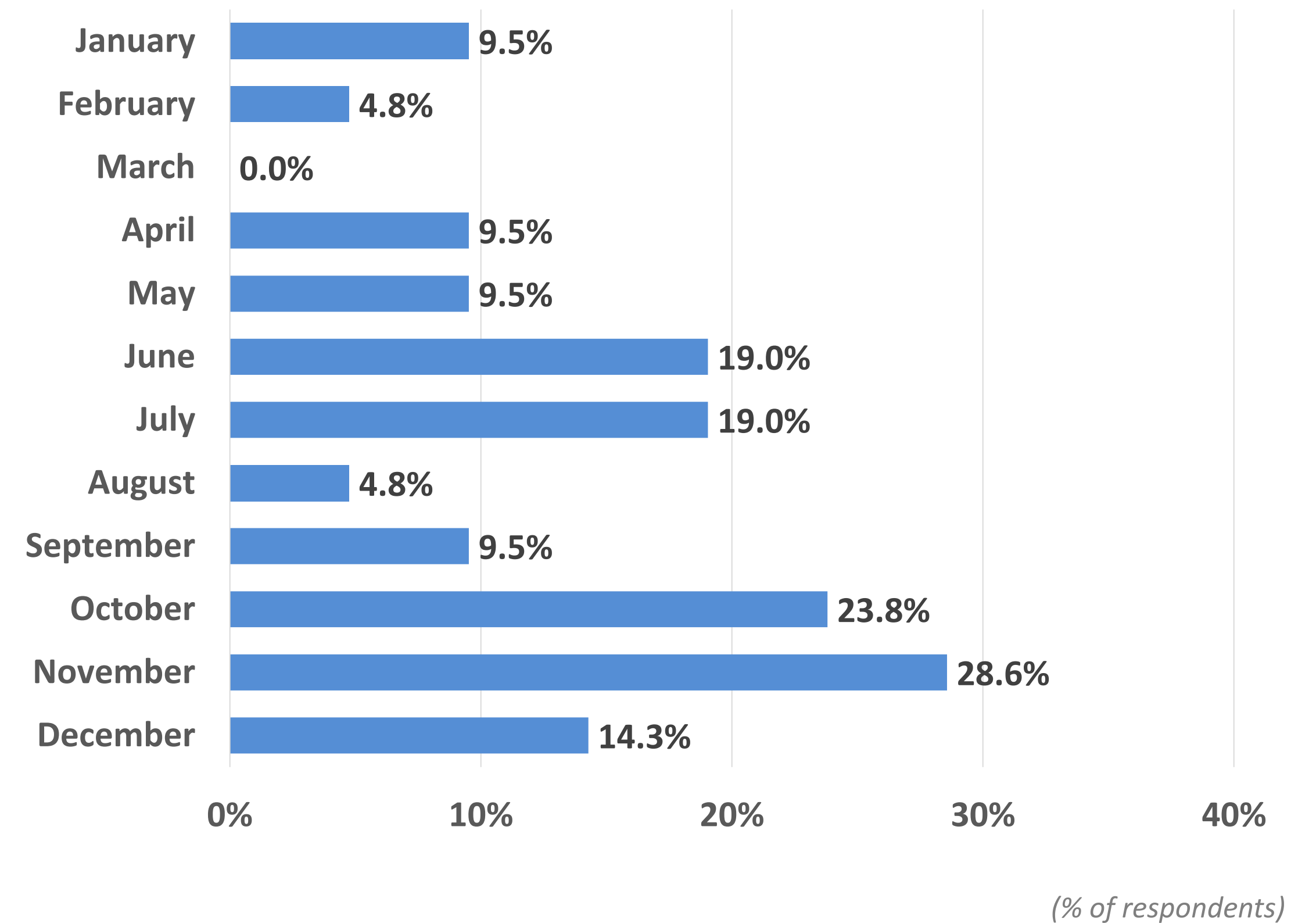
# Month of Visit for Upcoming Maryland Trip

Travelers who had not visited Maryland in the past six months but have a trip planned in the upcoming year will most commonly visit during the months of October (23.8%) and November (28.6%).

*Please note the small sample size. This data should be considered informational and not directional.*

Question: In which month(s) will you visit Maryland on your upcoming trip(s)? (Select all that apply) Base: Respondents who have not visited Maryland for leisure in the past 6 months but are certain to visit in the next 12 months. 21 responses.

Figure 14: Month of Visit for Upcoming Maryland Trip





# Motivation for Wanting to Visit Maryland

If considering a visit to Maryland, the top motivations for taking a trip to the state (amongst those who have not visited in the last six months) include enjoying local seafood (58.3%) and the abundant coastlines, beaches, and water activities (50.0%). Half or more of this group said these assets and activities would motivate them to plan a leisure trip to the state. Other top Maryland motivations are opportunities to relax, recharge and reconnect with their inner self (33.4%), the varied landscapes and natural beauty (30.4%), museums and historical sites (27.6%) and scenic drives (27.2%).

Question: Imagine you are considering a trip to Maryland. Which of the following describe your top motivations for wanting to visit Maryland? (Select all that apply) Base: Respondents who have not visited Maryland for leisure in the past 6 months. 952 responses.

Figure 15: Motivations for Wanting to Visit Maryland

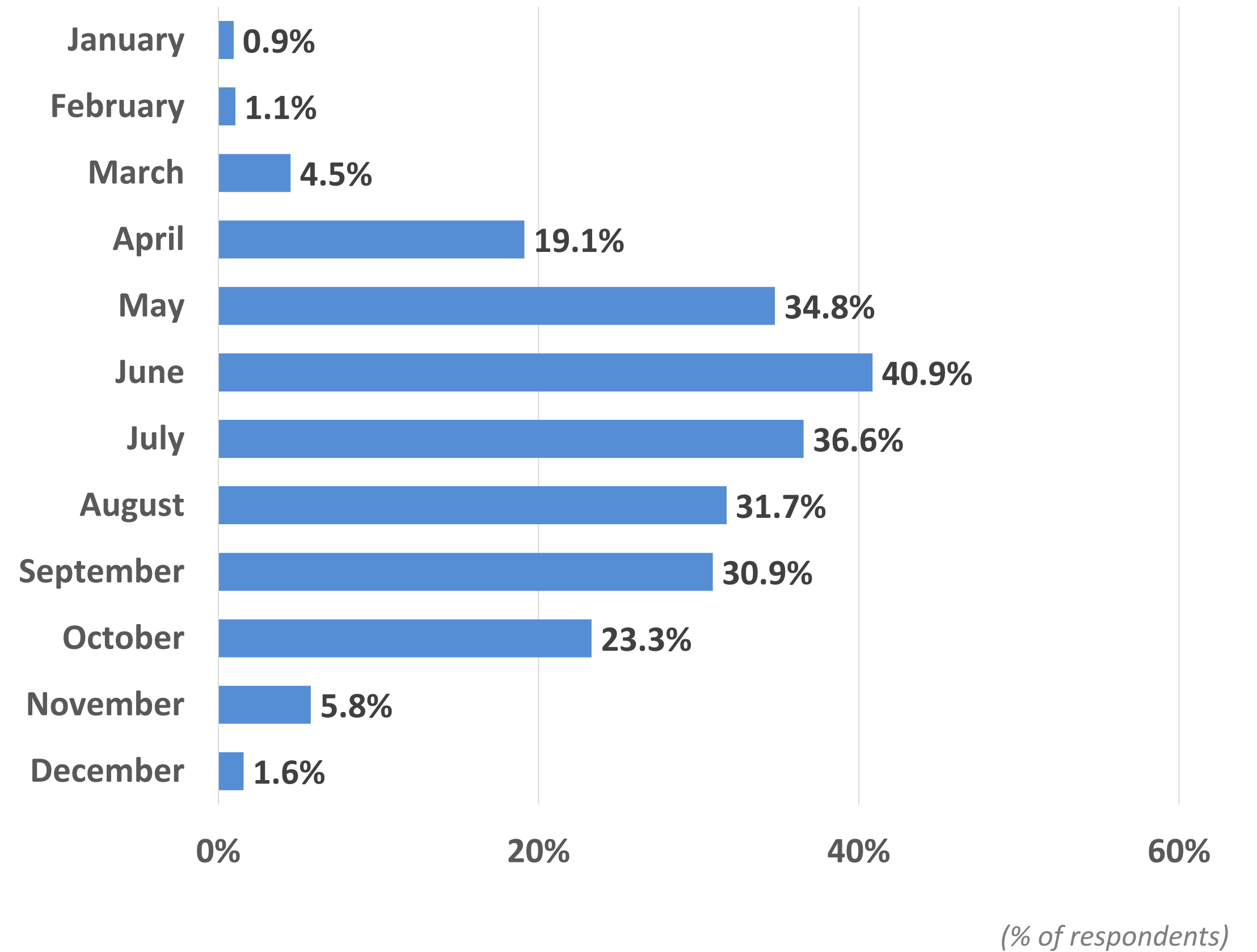


# Visiting Months

Late spring through early fall appear to be the most likely months this group would take a leisure trip to Maryland. If these potential visitors were converted, peak visitation to the state would likely occur during the months of May (34.8%), June (40.9%) and July (36.6%).

Question: In which month(s) would you most likely visit Maryland? (Select all that apply)  
Base: Respondents who have not visited Maryland for leisure in the past 6 months. 952 responses.

Figure 16: Visiting Months



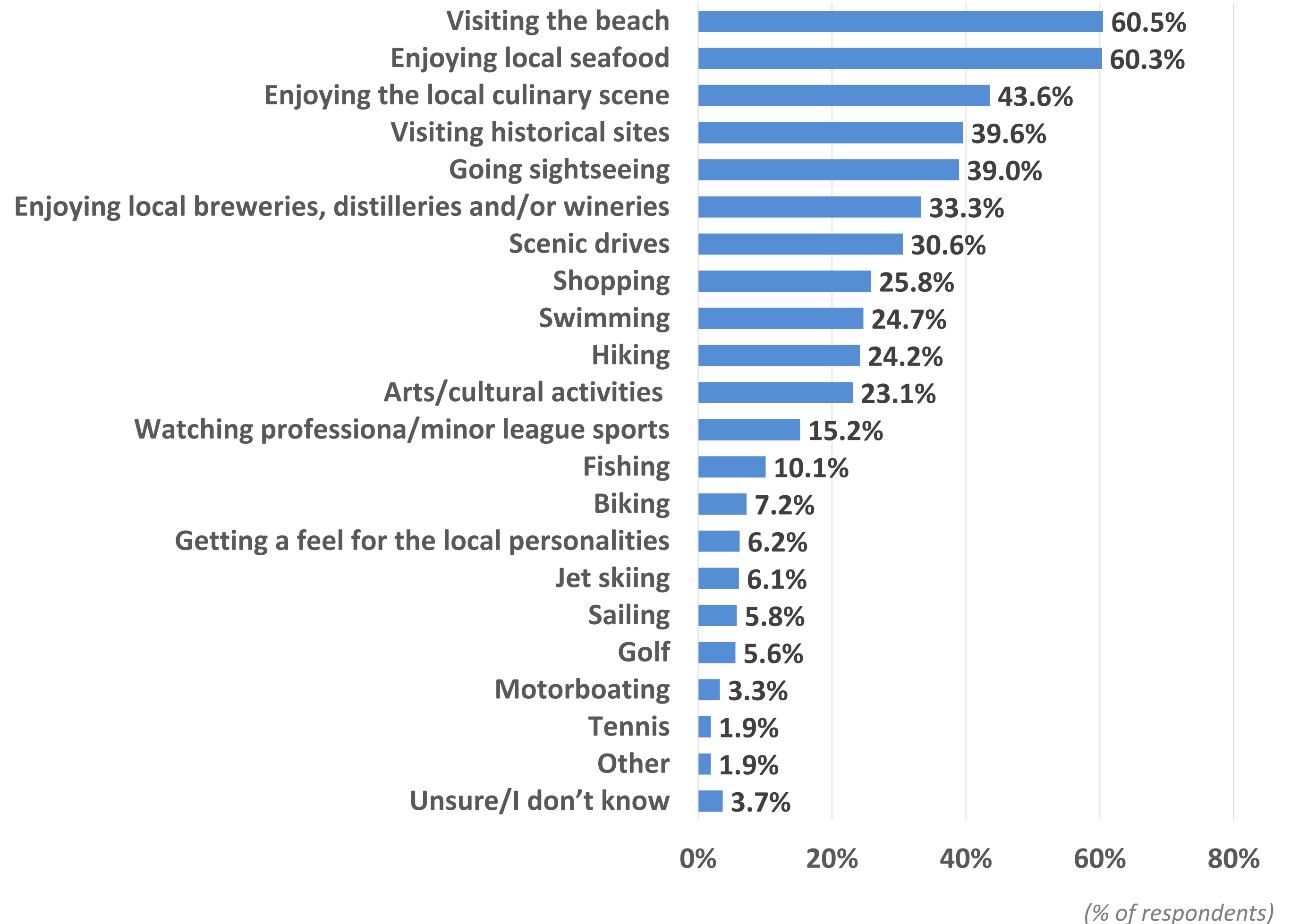


# Maryland Activities

Aligned with their motivations for a potential visit, this group would most likely visit the beach (60.5%) and/or enjoy local seafood (60.3%) on a trip to the state. Other Maryland trip activities of interest include enjoying the culinary scene (43.6%), visiting historical sites (39.6%), going sightseeing (39.0%), enjoying local breweries/distilleries/wineries (33.3%) and the scenic drives (30.6%).

Question: If you were to visit Maryland for leisure, which of the following activities would you want to participate in during your trip? (Select all that apply)  
 Base: Respondents who have not visited Maryland for leisure in the past 6 months.  
 952 responses.

Figure 17: Maryland Activities



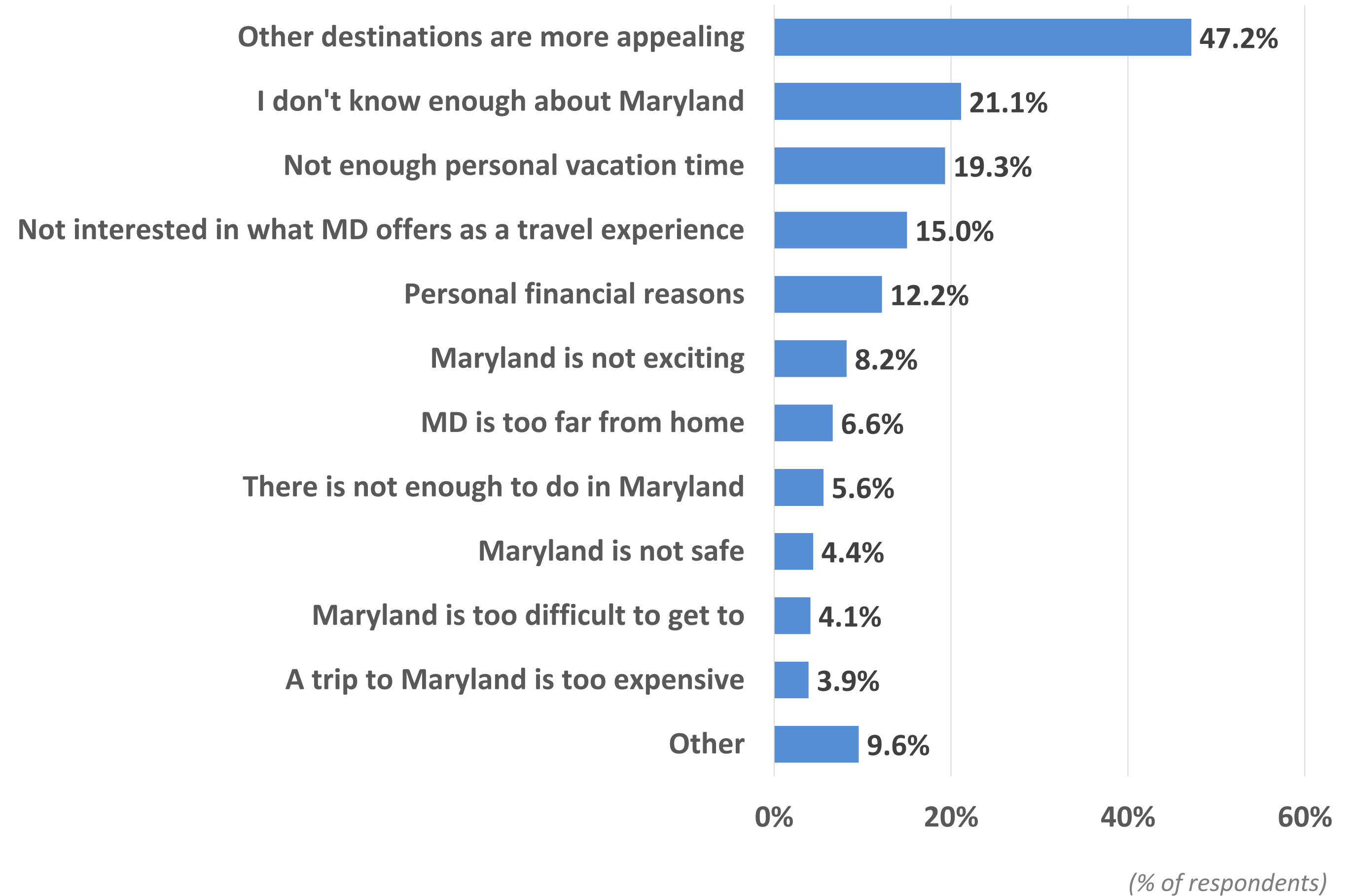
# Deterrents to Visiting Maryland

**Competition from other destination brands is the most significant deterrent to attracting more visitation to Maryland.** Travelers who have not visited Maryland in the past 6 months were presented with a list of deterrents and asked which best described their reasons for not visiting the state. Nearly half of respondents from this group said they felt that other destinations are more appealing (47.2%). Additionally, one-in-five said they don't know enough about Maryland (21.1%).

This suggests there is an opportunity to inspire visitation to the state through messaging that highlights how the Maryland travel experience is unique and/or superior to its competitors.

Question: Which of the following describe why you have not visited Maryland in the past 6 months? (Select all that apply) Base: Respondents who have not visited Maryland for leisure in the past 6 months. 952 responses.

**Figure 18: Motivations for Wanting to Visit Maryland**





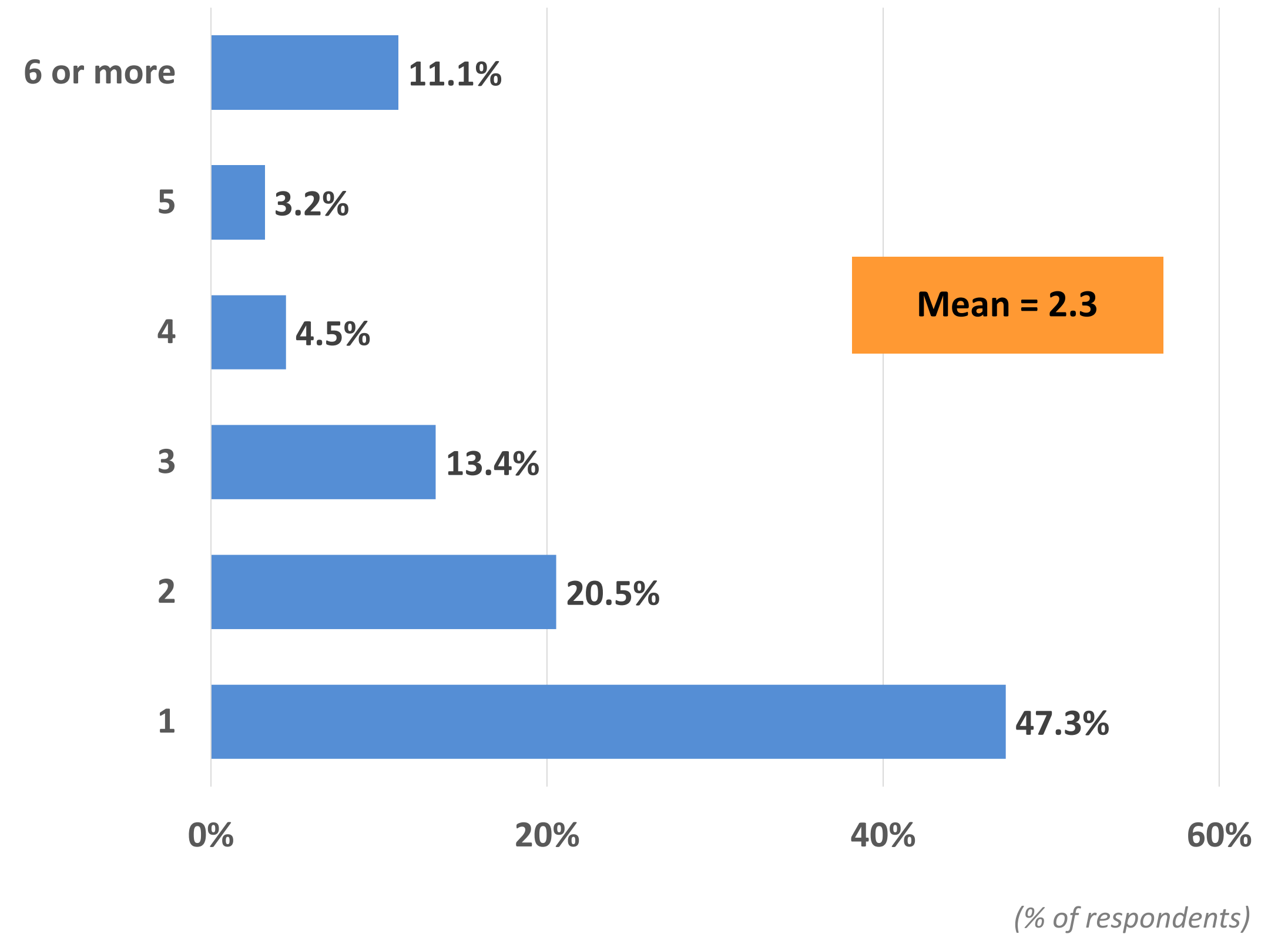
# PROFILE OF VISITORS TO MARYLAND (PAST SIX MONTHS)

# Number of Trips to Maryland

On average, recent visitors surveyed had taken 2.3 trips to (or within) Maryland in the past six months. Nearly half of recent visitors to Maryland took just one trip for leisure to the state (47.3%) while the remaining 52.7 percent took two or more trips in that time frame.

Question: How many trips for leisure or personal reasons did you make to (or within) Maryland in the past 6 months? Base: Respondents who have visited Maryland in the past 6 months. 628 responses.

Figure 19: Number of Trips to Maryland

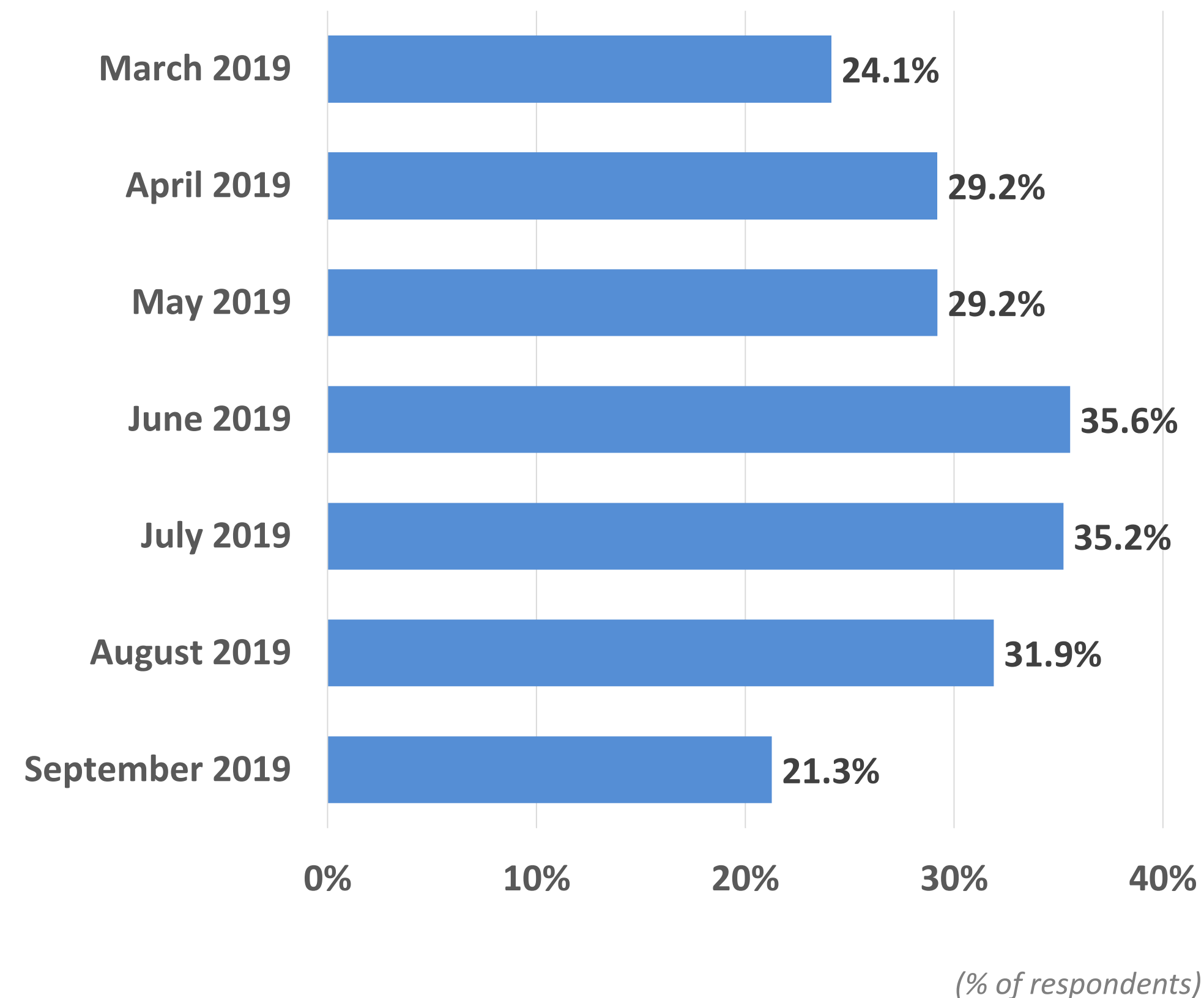




# Visited Months

The distribution of leisure visitation to Maryland (amongst recent visitors surveyed) was fairly even through the period of study (March- September 2019). Amongst recent visitors to Maryland, visitation was slightly higher during the months of June (35.6%) and July (35.2), but about three-in-ten also visited the state in April (29.2%), May (29.2%) and August (31.9%) of this year.

Figure 20: Visited Months



Question: In which month(s) did you visit Maryland on a leisure trip(s)? (Select all that apply) Base: Respondents who have visited Maryland in the past 6 months. 630 responses.

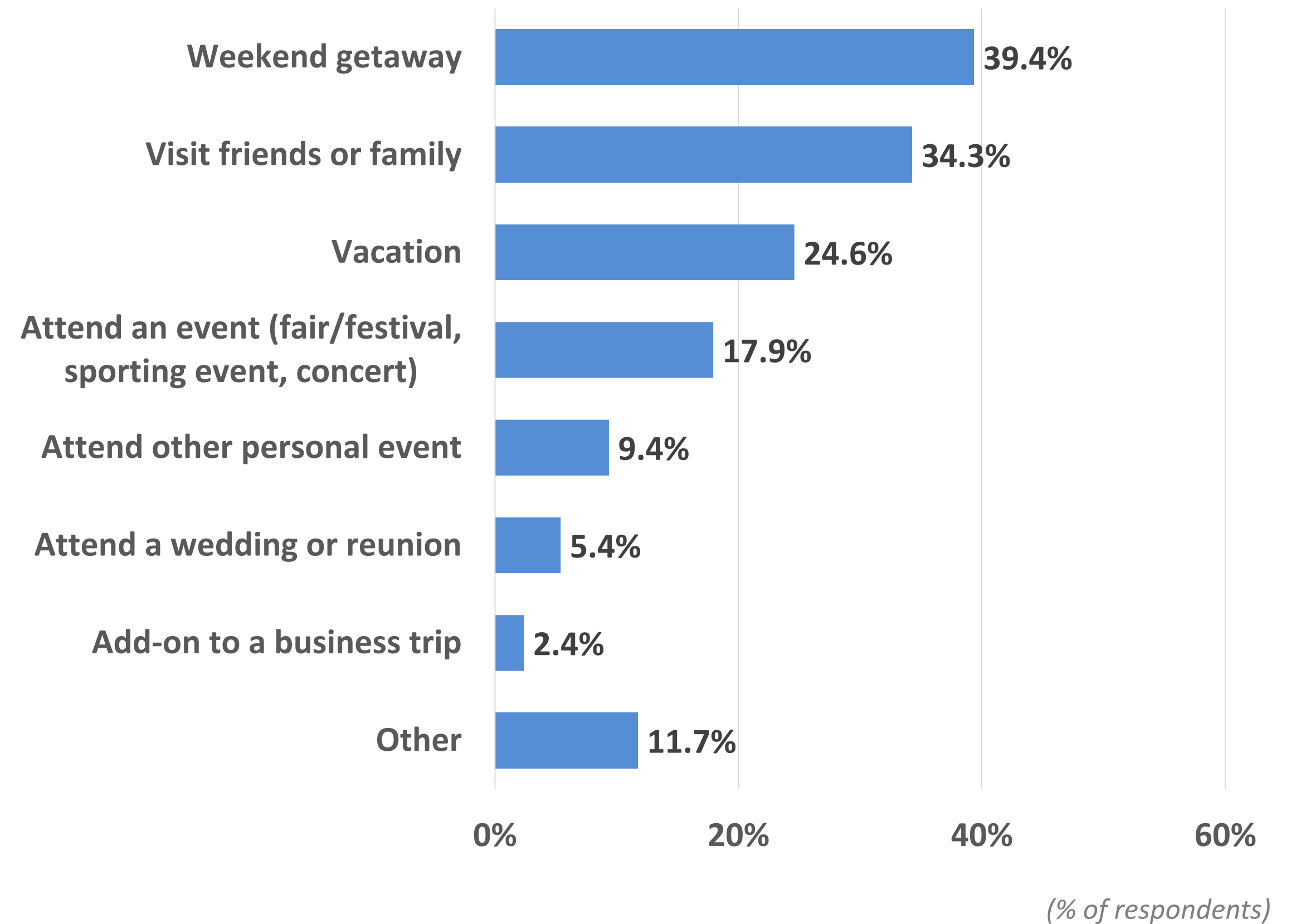
# Reasons for Visiting Maryland

**Weekend getaways (39.4%) and visiting friends or family (34.3%) in the state were the most common reasons recent visitors took a leisure trip to Maryland.** Additionally, a quarter of this group characterized their visit as a vacation (24.6%) and nearly two-in-five came to attend an event (17.9%).

In total, 2.4 percent visited Maryland for leisure as an add-on to a business trip.

Question: Which best describes your reason for visiting Maryland on this most recent leisure trip? Base: Respondents who have visited Maryland in the past 6 months. 630 responses.

**Figure 21: Reasons for Visiting Maryland**

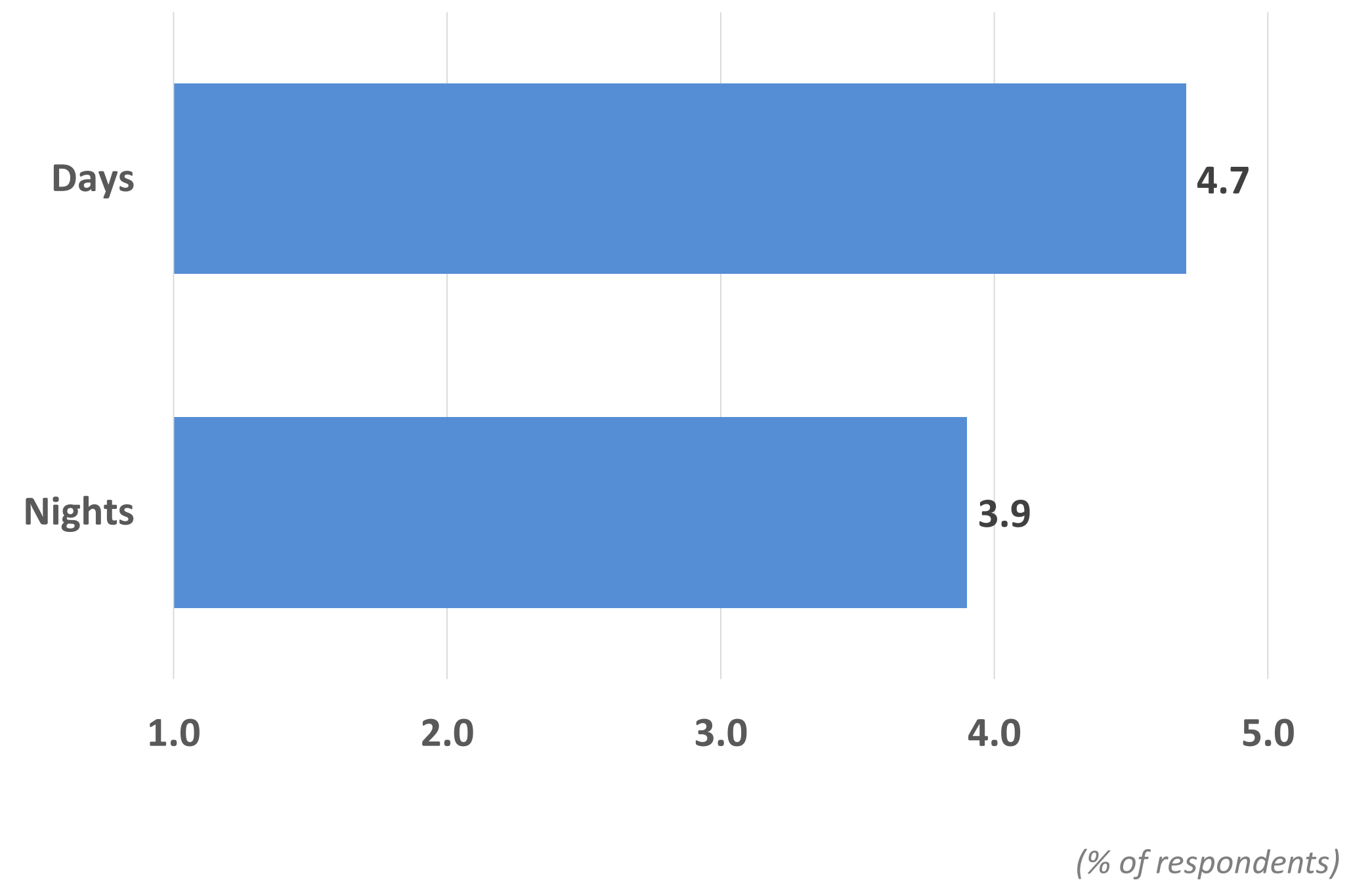




# Length of Stay in Maryland

The typical leisure visitor surveyed spent 4.7 days and 3.9 nights in Maryland on their trip.

Figure 22: Length of Stay in Maryland



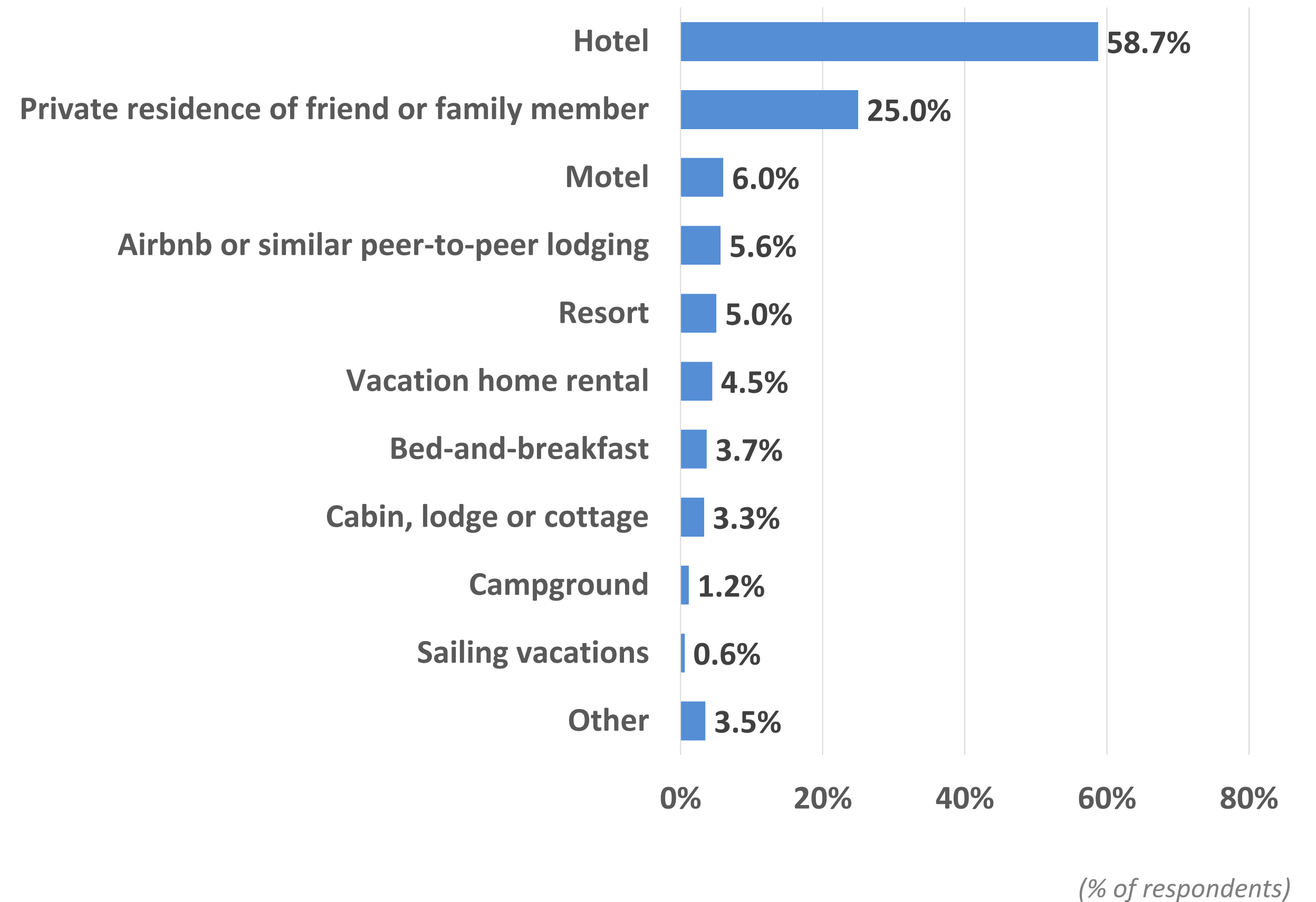
Question: How many total days and nights did you stay in Maryland on this trip?  
Base: Respondents who have visited Maryland in the past 6 months. 975 responses.

# Place of Stay

Recent visitors who stayed overnight within the state, most commonly stayed in a hotel (58.7%). Additionally, a quarter of this group stayed overnight in the private residence of local friends or family (25.0%). About 5.0 percent of overnight visitors surveyed stayed in a Maryland motel (6.0%), peer-to-peer lodging (5.6%) or a resort (5.0%) during their trip.

In total, 13.9 percent stayed in more than one lodging accommodation type during their trip to Maryland.

Figure 23: Place of Stay



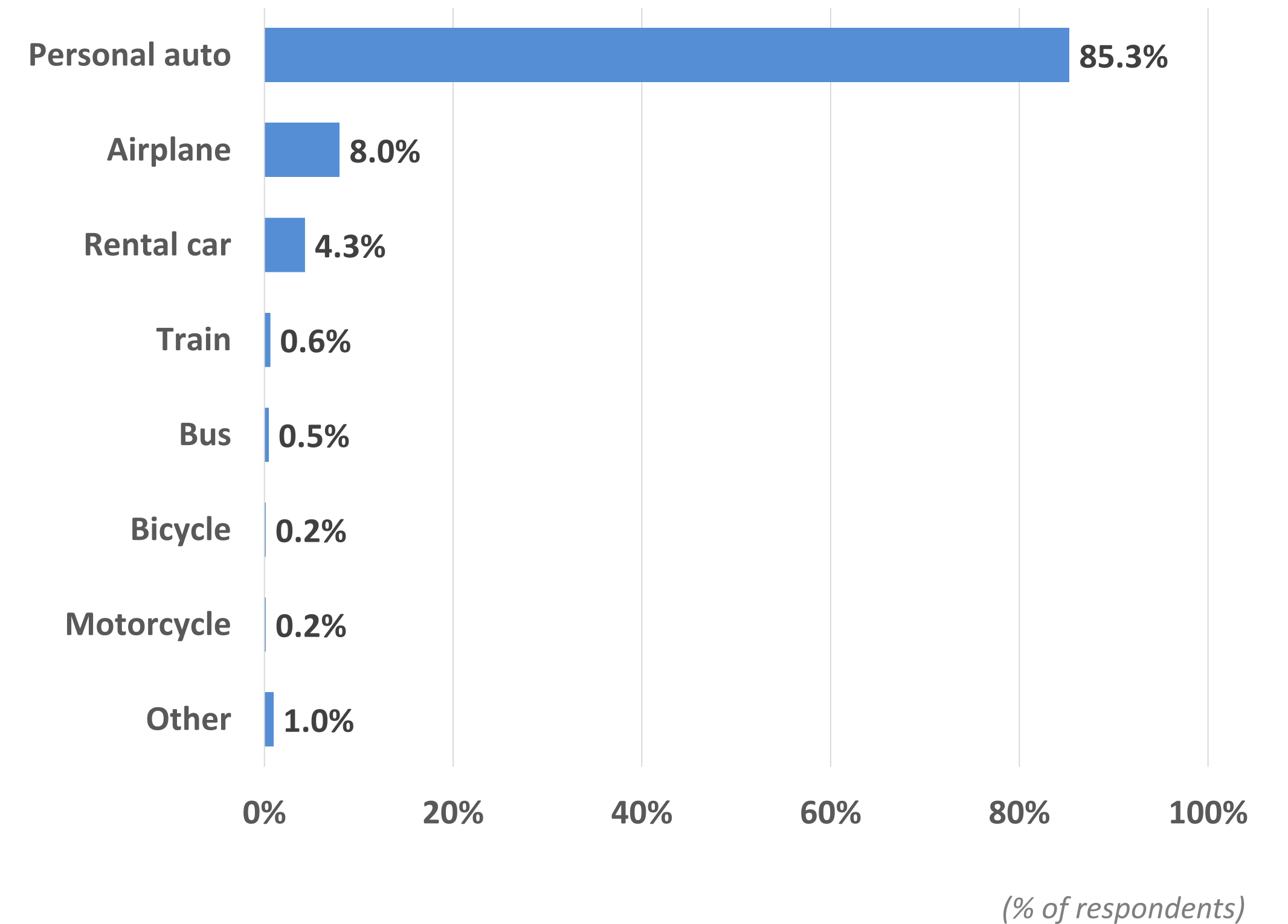
Question: In what type of lodging did you stay on this trip to Maryland? (Select all that apply) Base: Respondents who visited Maryland in the past 6 months and stayed overnight within the state. 516 responses.



# Method of Arrival

**Personal automobile (85.3%) was the most common method of arrival into the state amongst recent visitors surveyed.** Meanwhile, just under 10 percent arrived by airplane (8.0%) and 4.3 percent came by rental car.

**Figure 24: Method of Arrival**

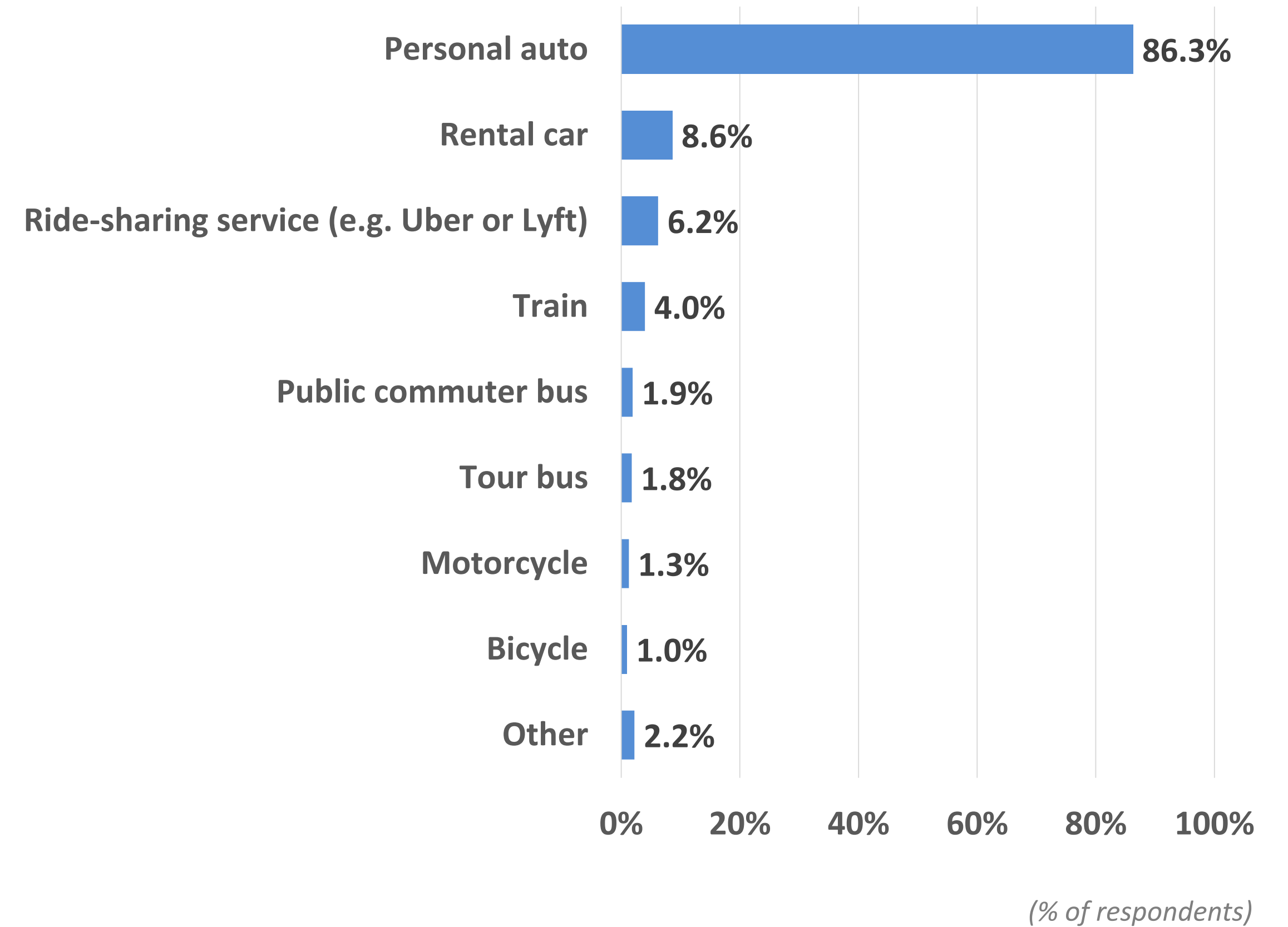


Question: If you were to take a leisure trip in Maryland, how would you most likely arrive?  
Base: Respondents who have visited Maryland in the past 6 months. 626 responses.

# Method of Transportation

For travel within the state, recent visitors most commonly used a **personal automobile in-market (86.3%)**. Additionally, just under 10 percent used a rental car (8.6%) and/or a ride-sharing service (6.2%) to travel around the state during their trip.

Figure 25: Method of Transportation



Question: Which mode(s) did you use to travel around the state during your trip? (Select all that apply) Base: Respondents who have visited Maryland in the past 6 months. 627 responses.



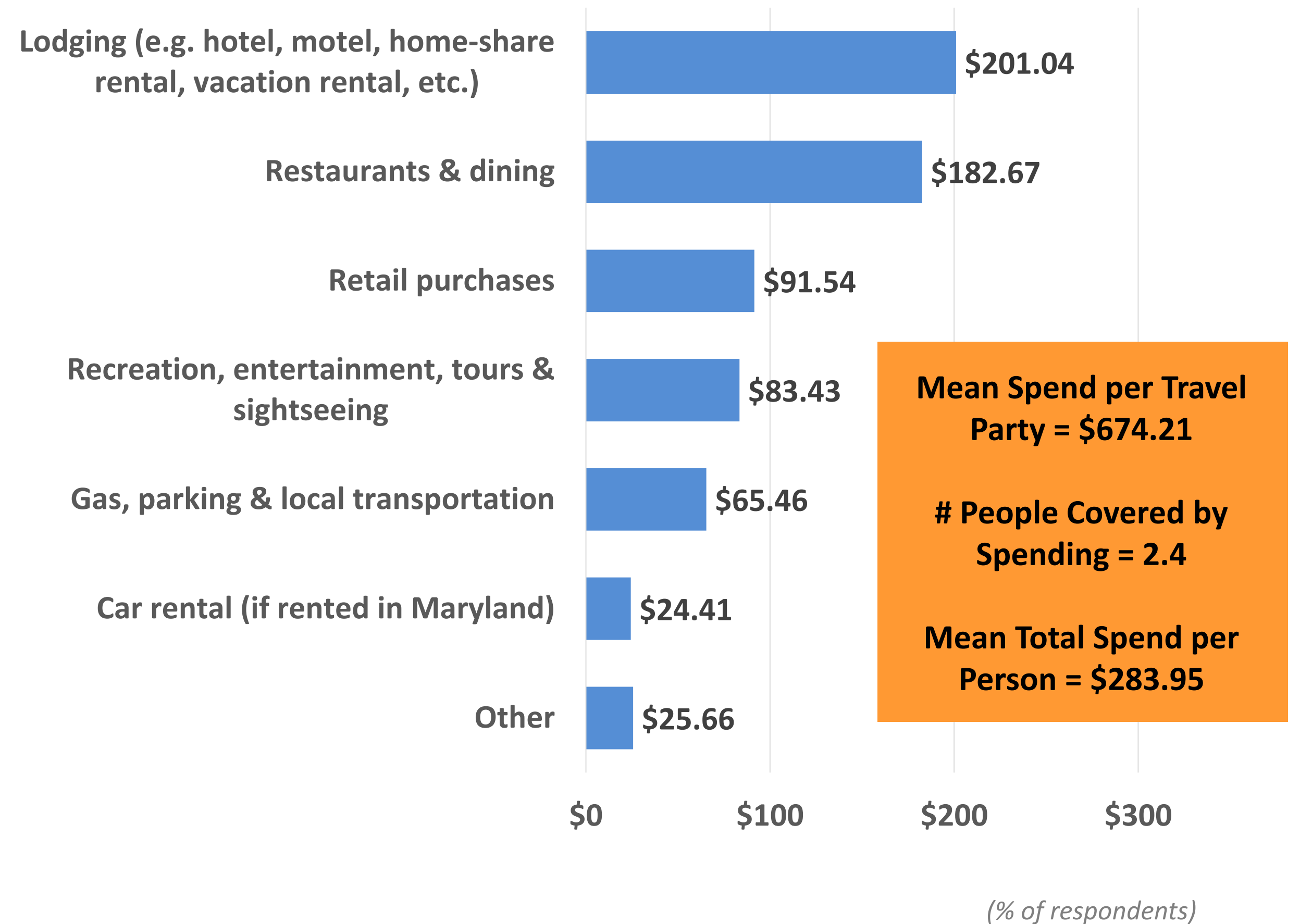
# Total In-Market Spending For Maryland Trip

The typical travel party to Maryland spent a total of \$674.21 in-market on their trip. The bulk of this spending was on lodging (\$201.04 was the average across all visitors surveyed including those not staying in paid lodging), and restaurants and dining (\$182.67). The average hotel guest surveyed spent a total of \$331.87 on their Maryland lodging accommodations.

It is estimated that the average visitor to Maryland represents \$283.95 in total spending to the state. This is based on the average \$674.21 total travel party spend covering 2.4 people.

Questions: 1. Please think about your spending during your Maryland trip. Approximately how much IN TOTAL did you spend on the following while in Maryland? 2. How many people did this spending cover (including yourself)? Base: Respondents who have visited Maryland in the past 6 months. 556 responses.

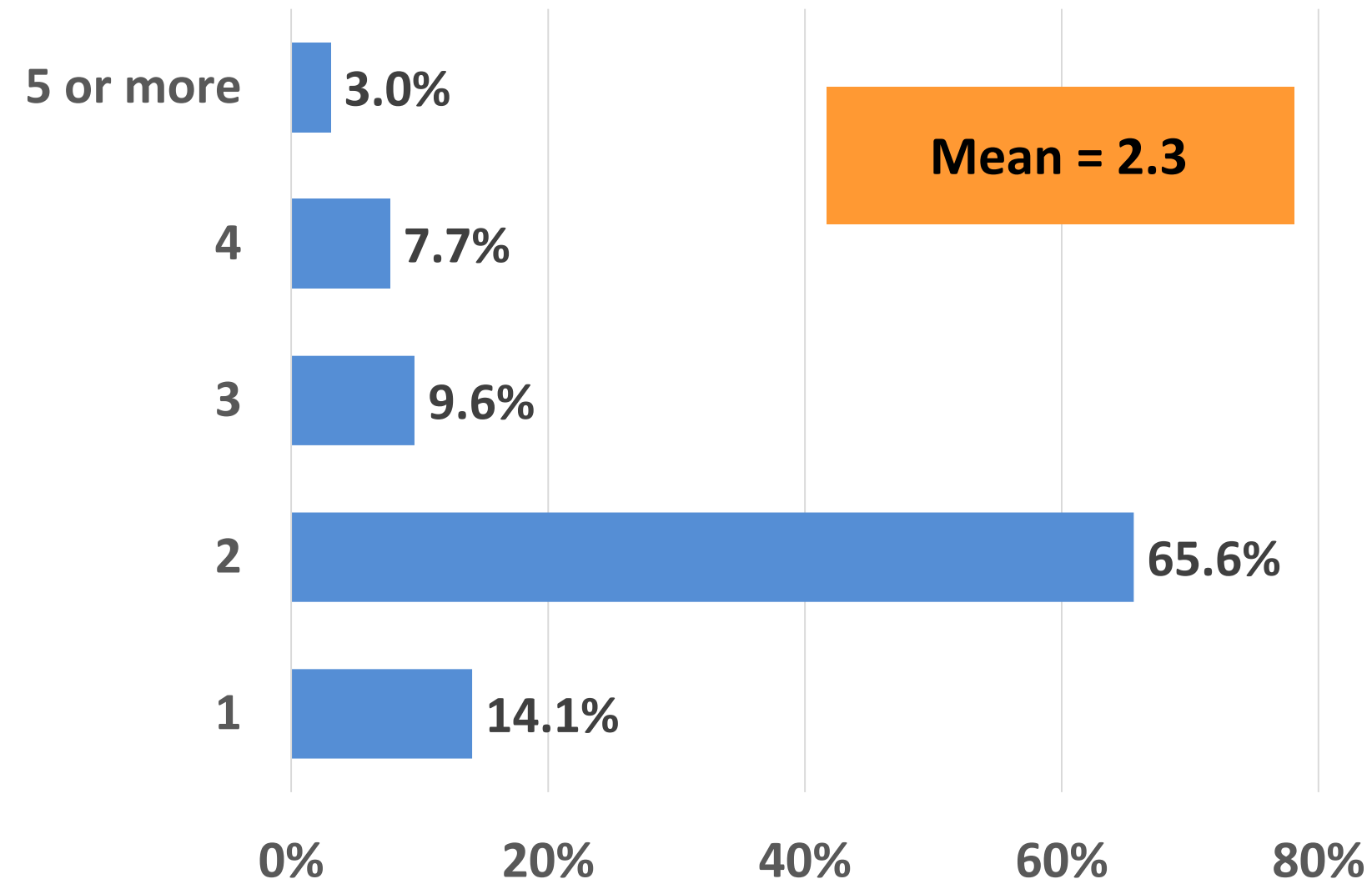
Figure 26: Total In-Market Spending For Maryland Trip



# Travel Party Composition

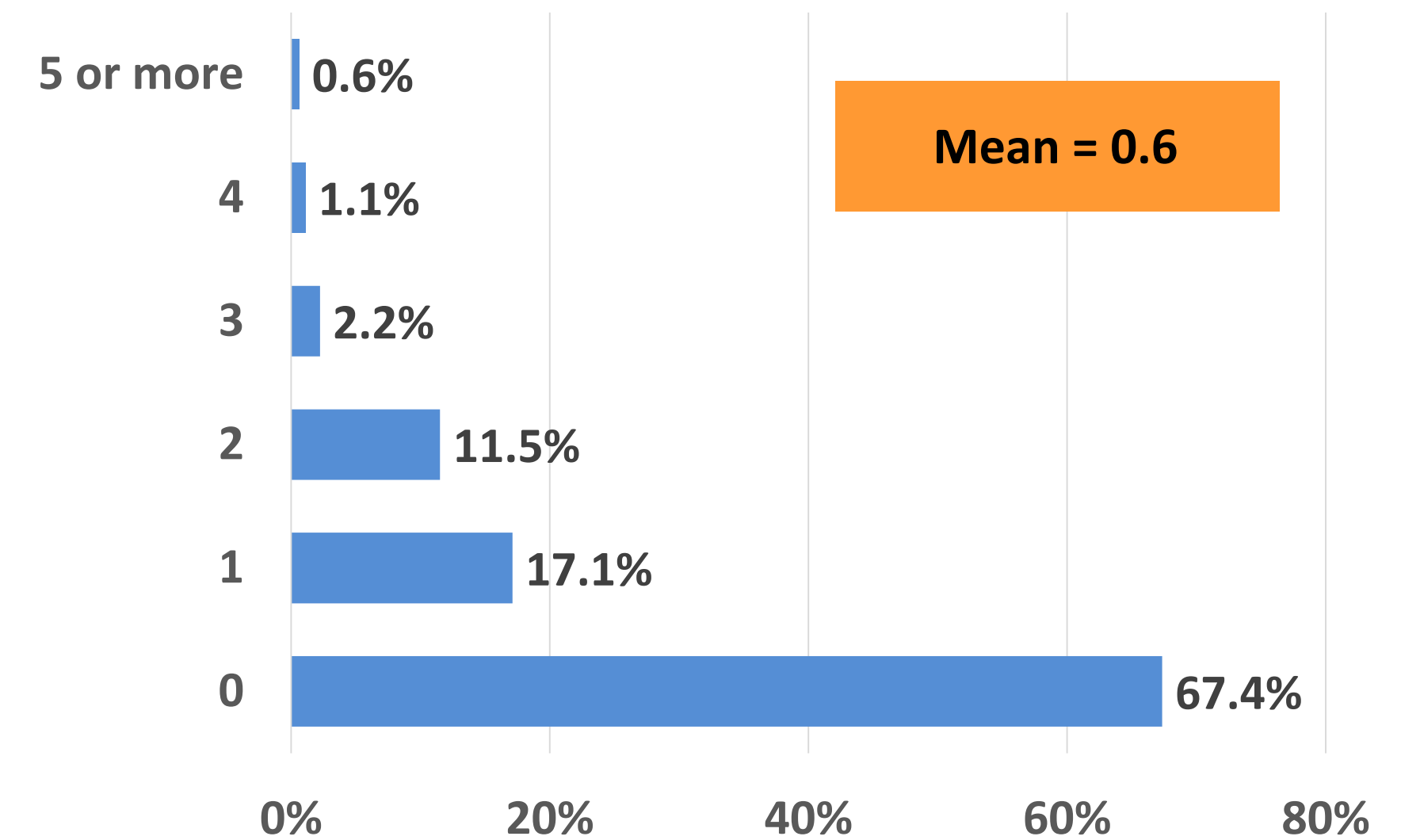
The typical Maryland travel party was comprised of 2.3 adults and 0.6 children. A majority of travel parties had just two adults (65.6%). However, 14.1 percent of respondents from this group were traveling alone. Meanwhile, nearly a third of recent visitors surveyed had children under the age of 18 in their travel party (32.6%).

Figure 27: Adults in Travel Party



Question: How many people were in your immediate travel party including yourself? (Please enter the number of ADULTS) Base: Respondents who have visited Maryland in the past 6 months. 625 responses.

Figure 28: Children in Travel Party



Question: How many people were in your immediate travel party including yourself? (Please enter the number of CHILDREN UNDER 18) Base: Respondents who have visited Maryland in the past 6 months. 625 responses.

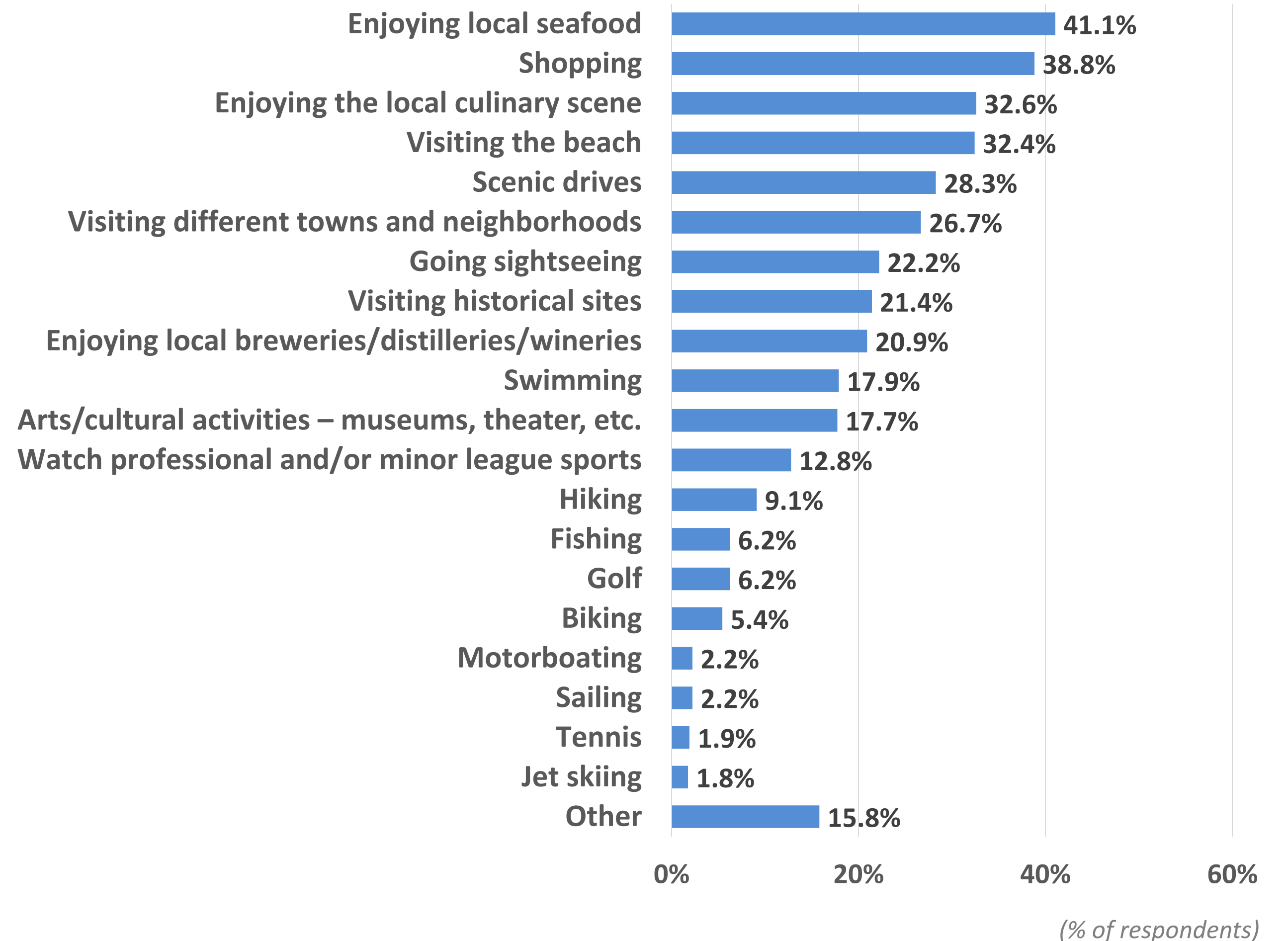


# Maryland Activities

Recent visitors participated in a variety of activities during their Maryland trip with the most common being enjoying local seafood (41.1%) and shopping (38.8%). Additionally, over a quarter of recent visitors surveyed also enjoyed the local culinary scene (32.6%), visited the beach (32.4%), took scenic drives (28.3%) and visited different towns and neighborhoods (26.7%).

Question: Which of the following activities did you participate in during your trip to Maryland? (Select all that apply) Base: Respondents who have visited Maryland in the past 6 months. 626 responses.

Figure 29: Maryland Activities



# Important Factors in the Decision-Making Process

The most important factors motivating visitation to the state include enjoying local seafood (32.4%) and opportunities to bond with family and form memories for a lifetime (29.2%). Three-in-ten recent visitors said these factors were most important when making the decision to visit to Maryland for leisure. Secondary factors that were important to the destination decision process include Maryland’s abundant coastline, beaches, and wide range of water-activities (24.1%) and opportunities to relax, recharge, and reconnect with their inner self (23.0%).

Although shopping was one of the top activities recent visitors participated in during their trip to Maryland, one-of-a-kind shopping experiences (6.5%) was the least likely factor to have played an important role in visitors’ decision to take a trip to the state.

Question: Which of the following were IMPORTANT to your decision to make this visit to Maryland? (Select all that apply) Base: Respondents who have visited Maryland in the past 6 months. 626 responses.

Figure 30: Important Factors in the Decision-Making Process

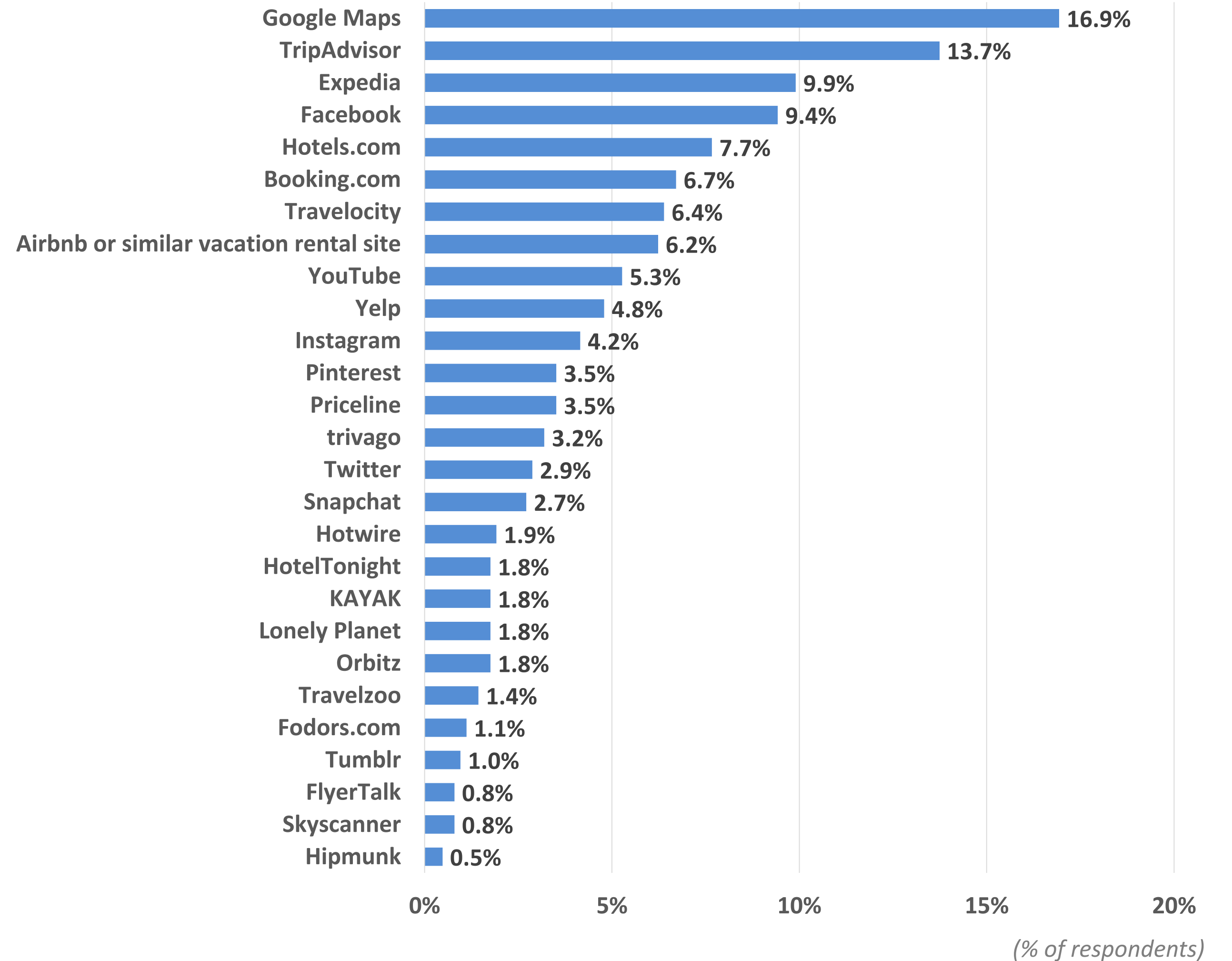




# Travel Planning Resources

Google Maps, TripAdvisor, Expedia and Facebook were the most utilized resources recent visitors used to plan their Maryland trip. Survey respondents were presented with a list of travel planning resources and asked which they use to plan their trip to the state. Beyond these, just under one-in-ten also used other OTAs such as Hotels.com (7.7%), Booking.com (6.7%) and/or Travelocity (6.4%). Meanwhile, 6.2 percent used a vacation rental site such as Airbnb to plan their trip.

Figure 31: Travel Planning Resources



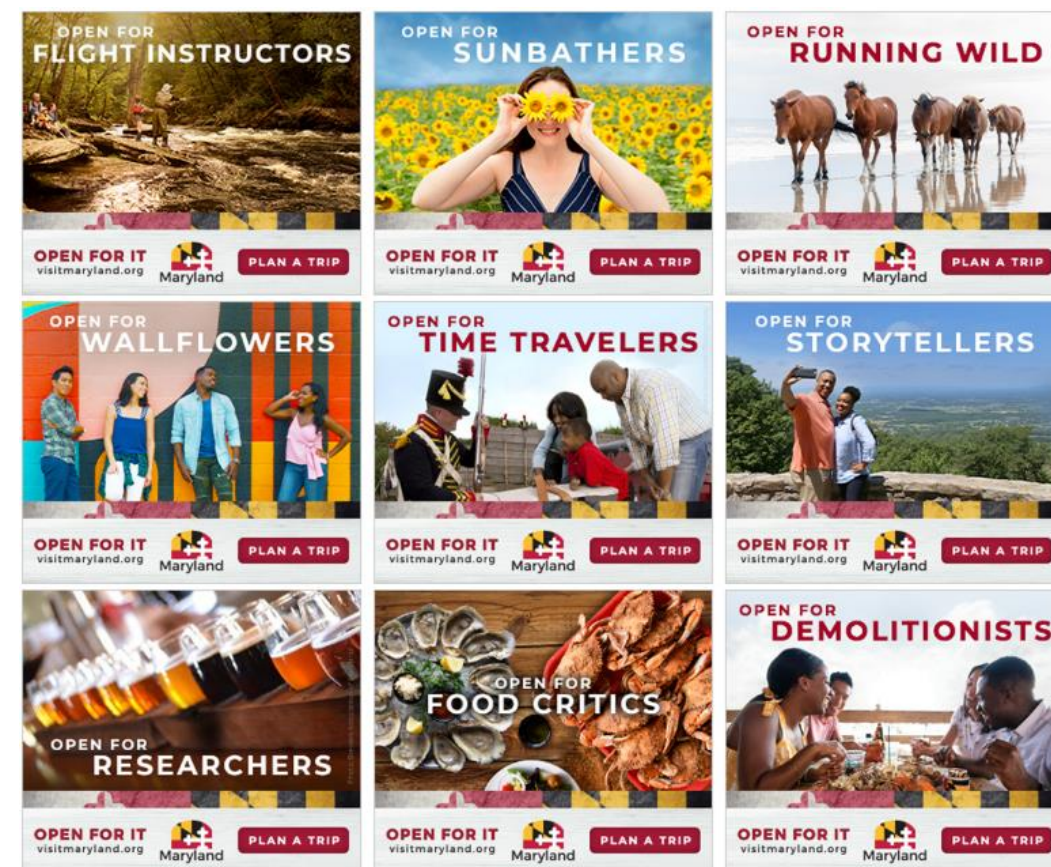
Question: Which of the following did you use to plan or research this trip to Maryland? (Select all that apply) Base: Respondents who have visited Maryland in the past 6 months. 626 responses.

# MARYLAND ADVERTISING RECALL & EFFECTIVENESS



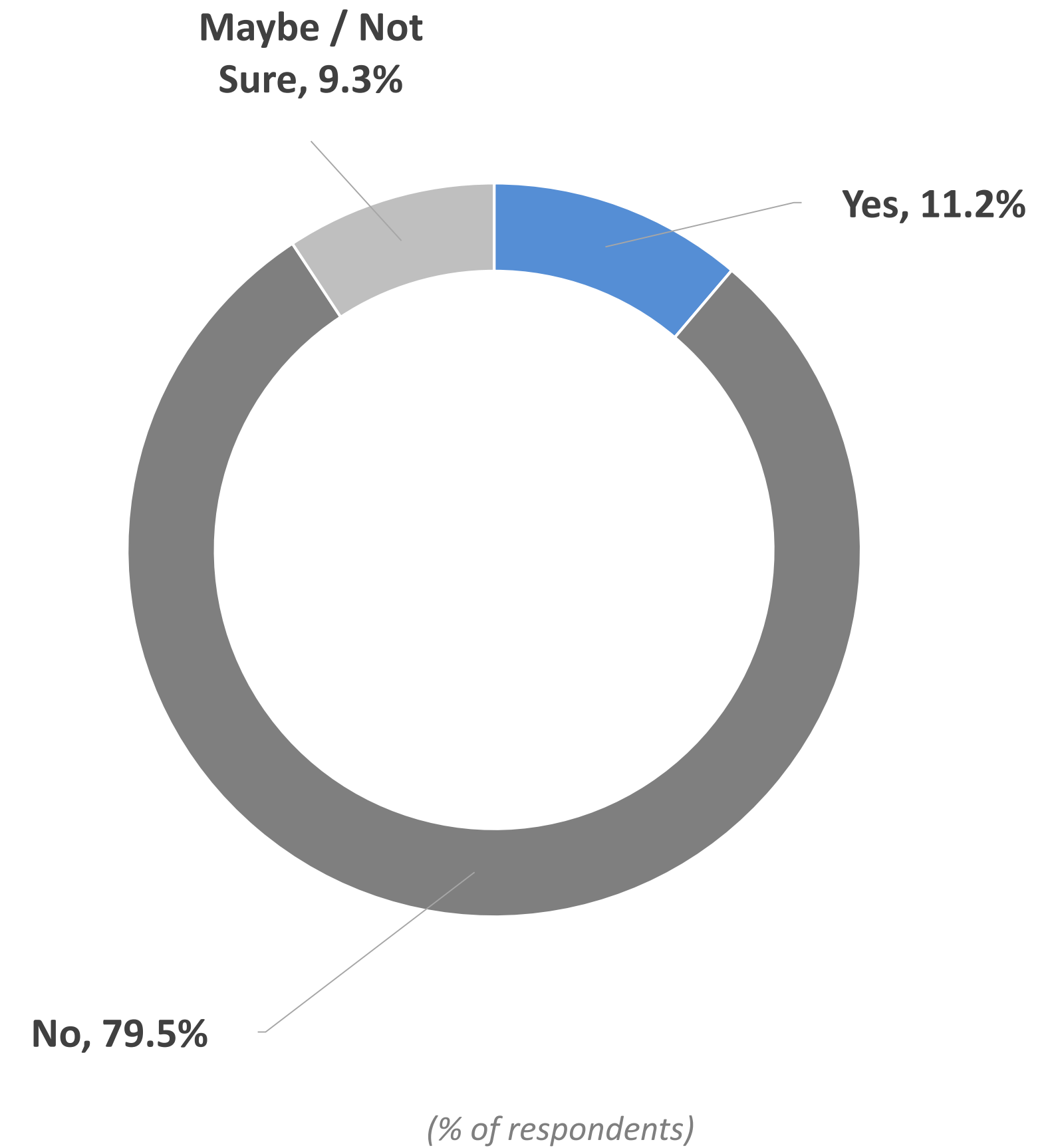
# Maryland Digital Advertising Recall (Aided)

One-in-ten travelers from the key markets of study recalled seeing the digital ads from the 2019 campaign (11.2%).



Question: During the past 6 months, do you recall having seen any of these advertisements online? Base: 1,600 responses.

Figure 32: Maryland Digital Advertising Recall (Aided)



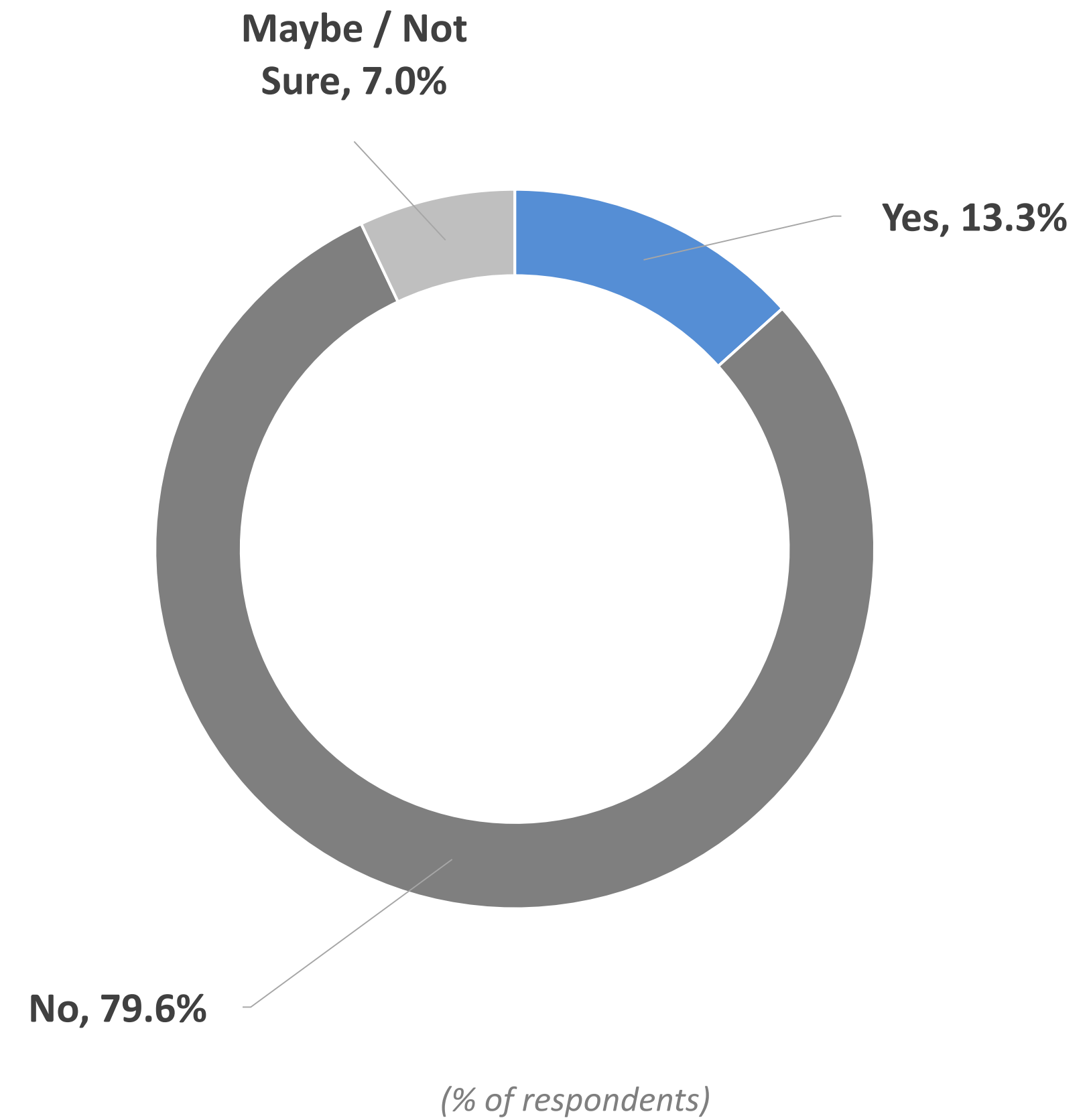
# Video Advertising Recall (Aided)

Just under 15 percent of this audience recalled seeing the video advertisements from the 2019 campaign (13.3%).



Question: During the past 6 months, do you recall having seen any of these advertisements on television or online? Base: 1,600 responses.

Figure 33: Video Advertising Recall (Aided)

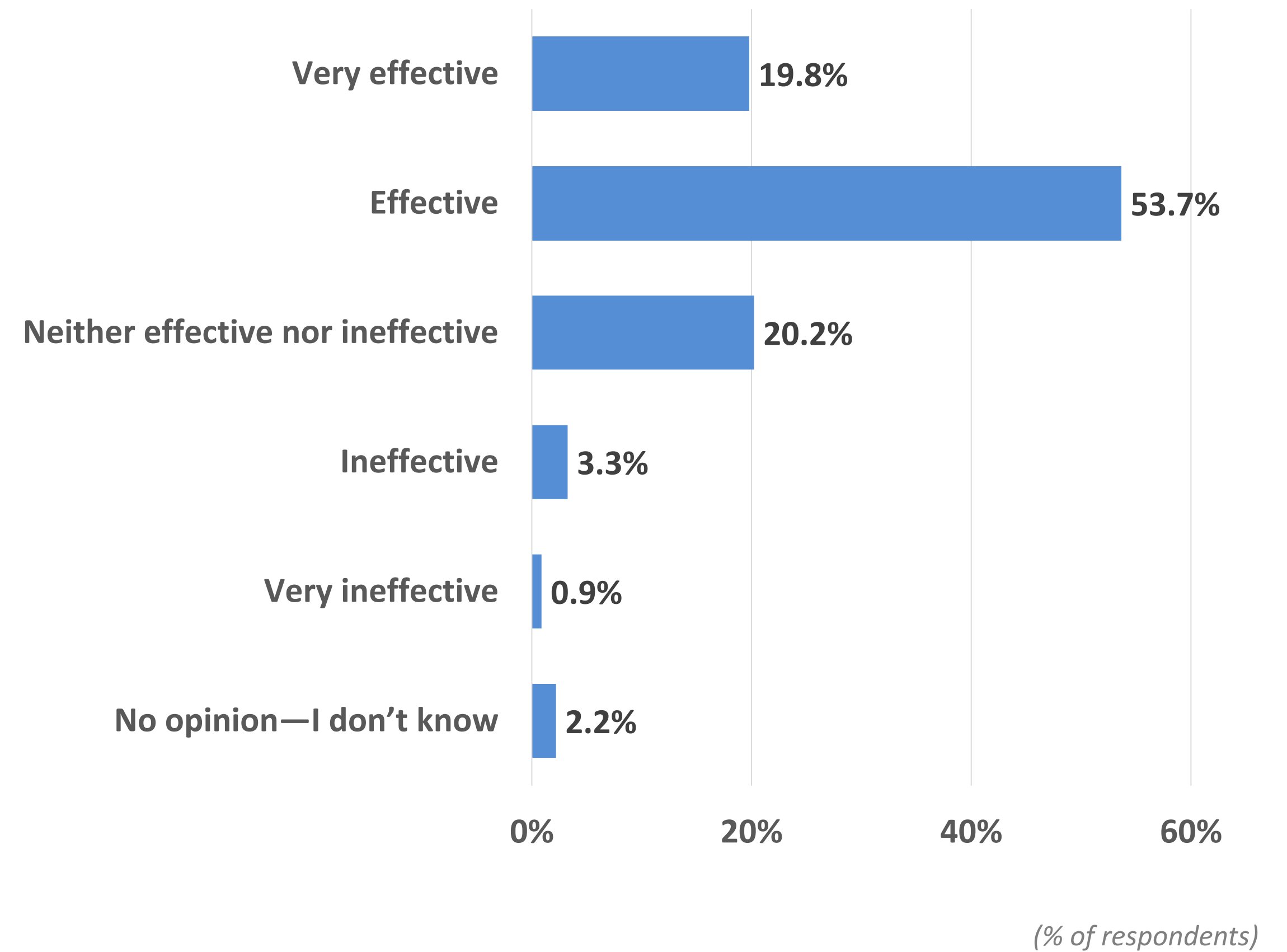




# Ads' Effectiveness in Portraying Maryland as Enjoyable Leisure Destination

The Maryland advertising creative was effective in portraying the state as an enjoyable leisure destination. Nearly three-quarters of all travelers surveyed said these advertisements were effective (53.7%) or very effective (19.8%) in this regard. In contrast, less than 5.0 percent of respondents felt the campaign creative was ineffective (3.3%) or very ineffective (0.9%) in its portrayal of Maryland's leisure offerings.

Figure 34: Ads' Effectiveness in Portraying Maryland as Enjoyable Leisure Destination

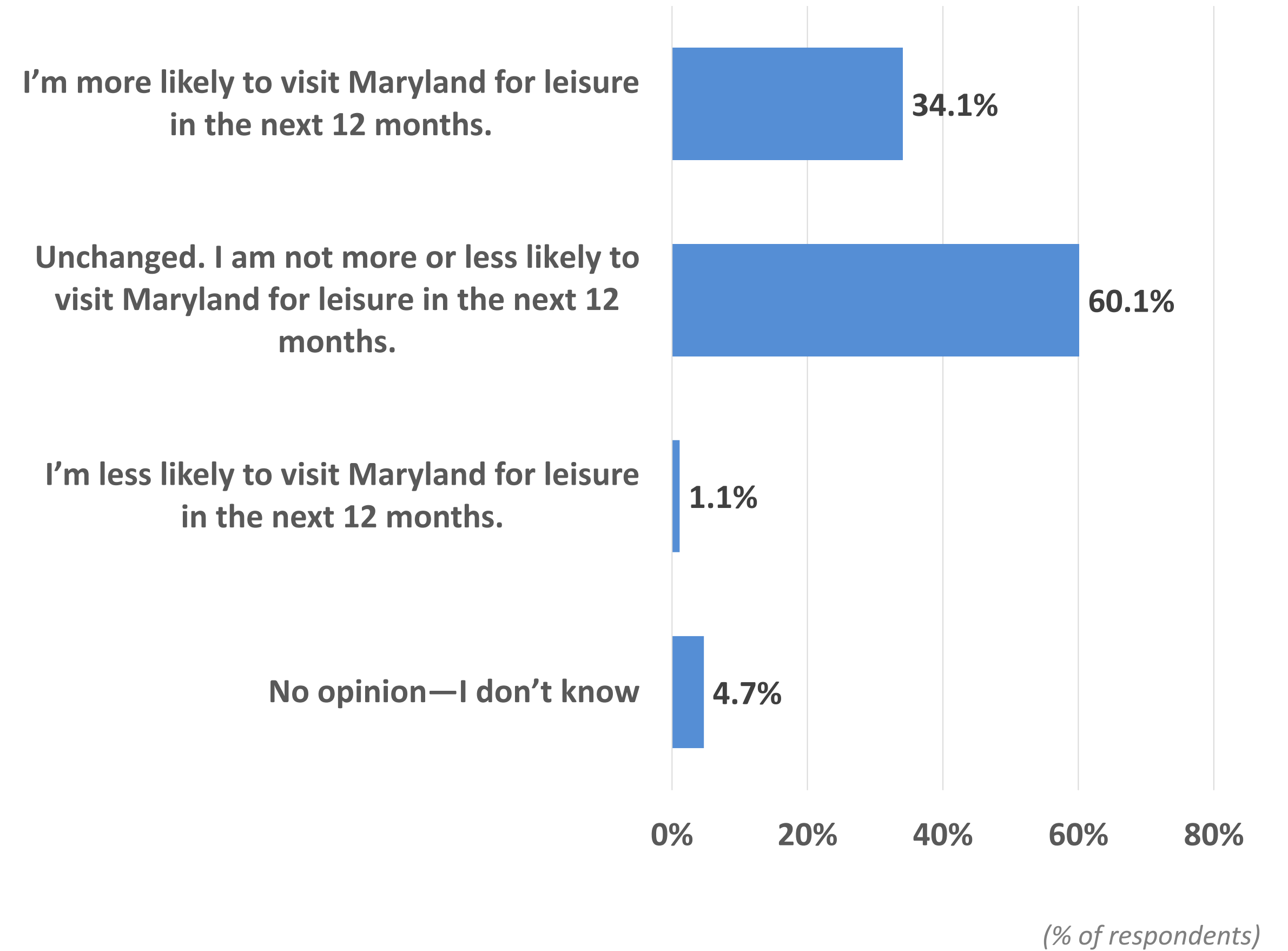


Question: After viewing this series of advertisements, overall, how effective do you think these advertisements are in portraying Maryland as a place you would enjoy visiting for leisure reasons? Base: All respondents. 1,600 responses.

# Ads' Effect on Likelihood to Visit Maryland

After viewing these advertisements, over a third of all travelers in key markets surveyed said they were more likely to visit Maryland for leisure in the next year (34.1%). Meanwhile, 60.1 percent of respondents said their likelihood of visiting the state has remained unchanged.

Figure 35: Ads' Effect on Likelihood to Visit Maryland



Question: How did the advertisements you viewed today affect your likelihood to visit Maryland in the next 18 months? Base: All respondents. 1,600 responses.



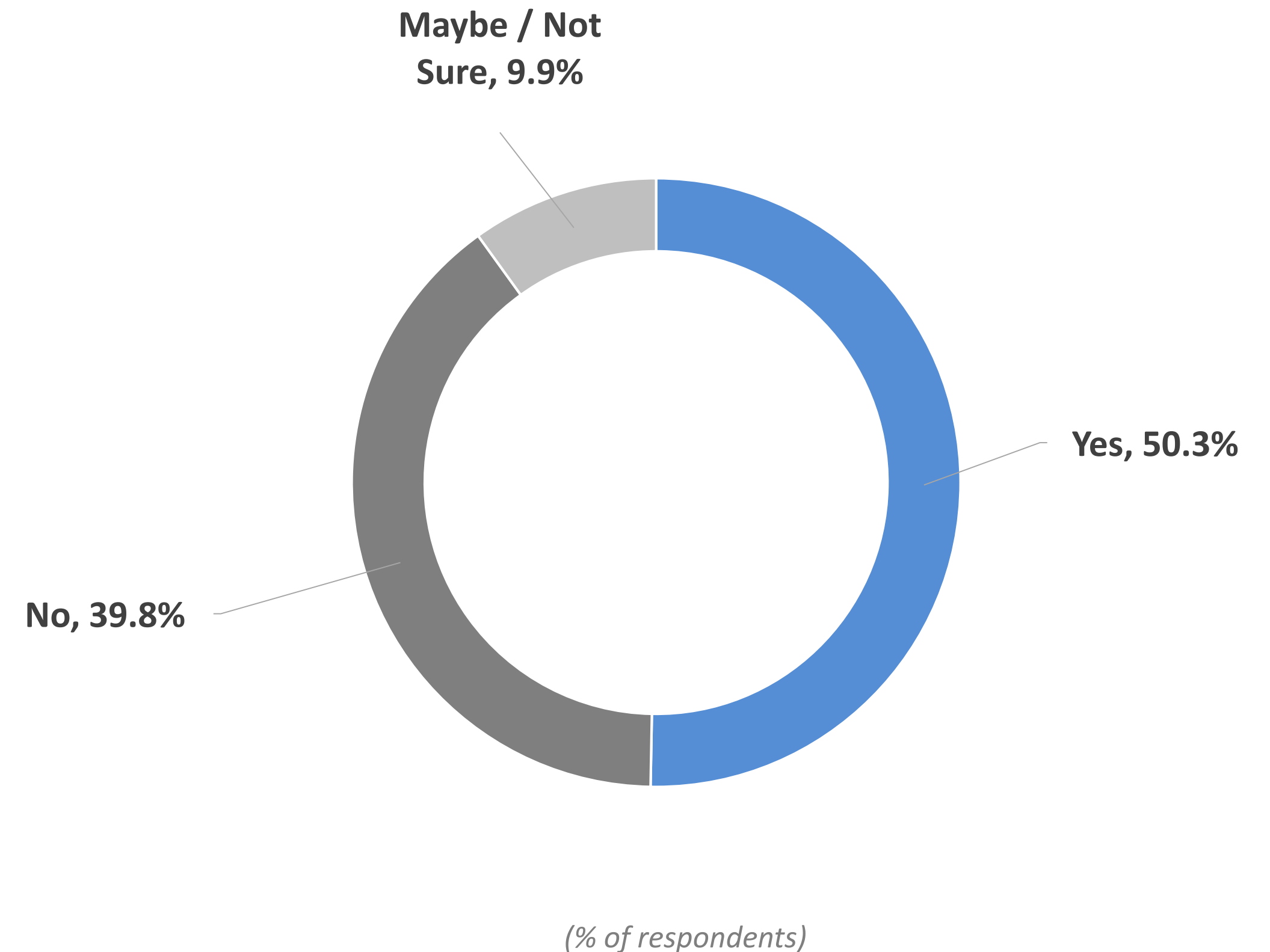
# PROFILE OF RECENT MARYLAND VISITORS WHO RECALLED ONE OR MORE ADS TESTED

# Ads' Influence on Decision to Visit Maryland

Illustrating the advertising's strong performance, half of recent visitors to Maryland surveyed reported that the campaign creative indeed influenced their decision to visit the state. Survey respondents who reported having made at least one trip to Maryland in the past six months and recalled seeing at least one of the ads tested were asked if the ad(s) they saw had in any way influenced their decision to visit the state. Fully, 50.3 percent of this group said the ads indeed affected their decision to visit Maryland.

Question: You said that you recall seeing one or more of Maryland tourism ads that you reviewed earlier in the survey. Did this ad (or ads) you saw in any way influence your decision to visit Maryland? Base: Respondents who visited Maryland in the past six months and recalled one or more ads tested. 171 respondents.

Figure 36: Ads' Influence on Decision to Visit Maryland

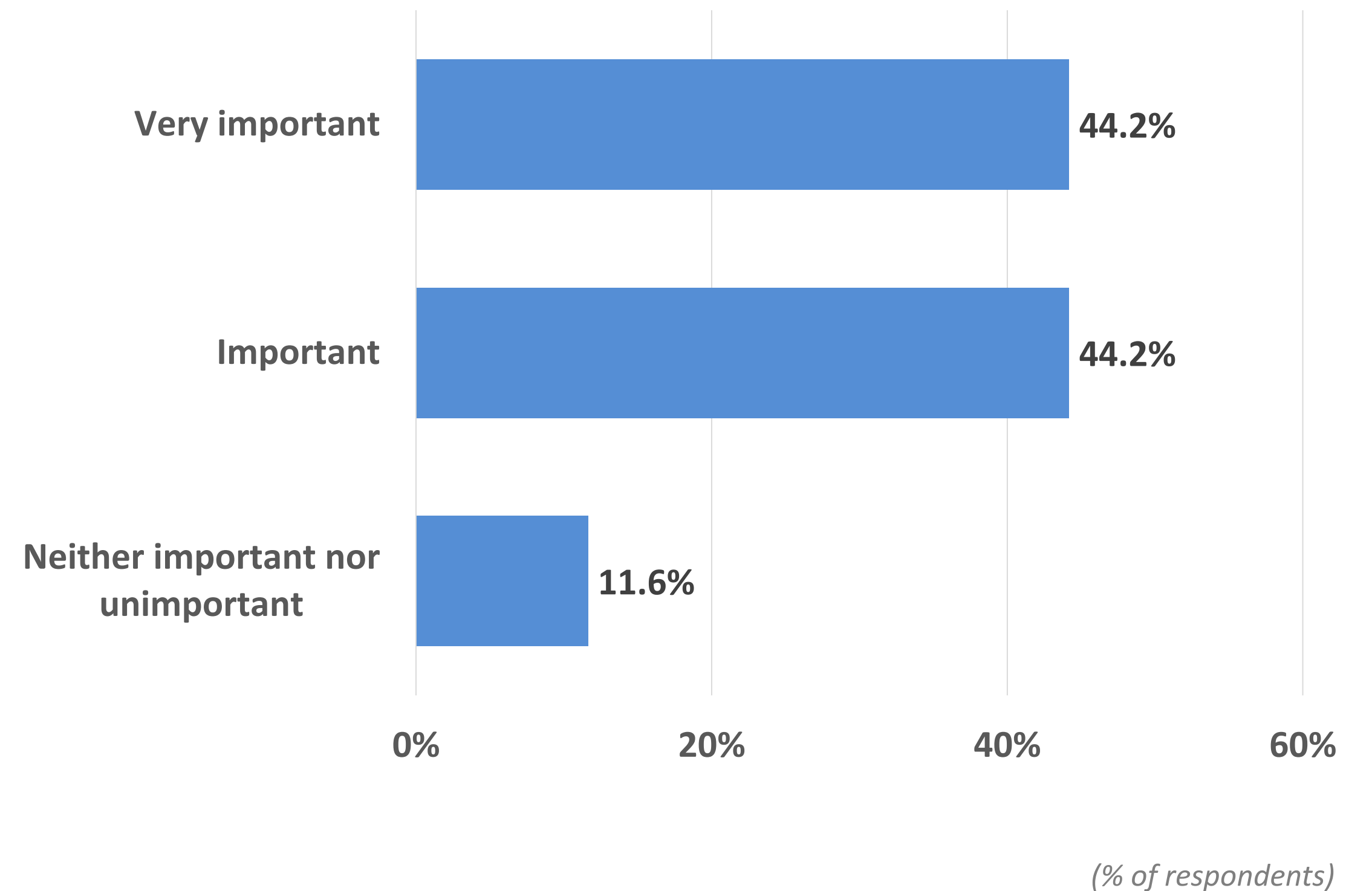




# Importance of Ads in Decision to Visit Maryland

Amongst ad-exposed visitors who were influenced to take a trip to Maryland by the campaign, the creative appears to have played an important role in the ultimate decision to visit. Nearly nine-in-ten recent visitors who said they were influenced to visit the state by the ads tested said these recalled ads were important (44.2%) or very important (44.2%) to their decision to visit Maryland.

Figure 37: Importance of Ads in Decision to Visit Maryland



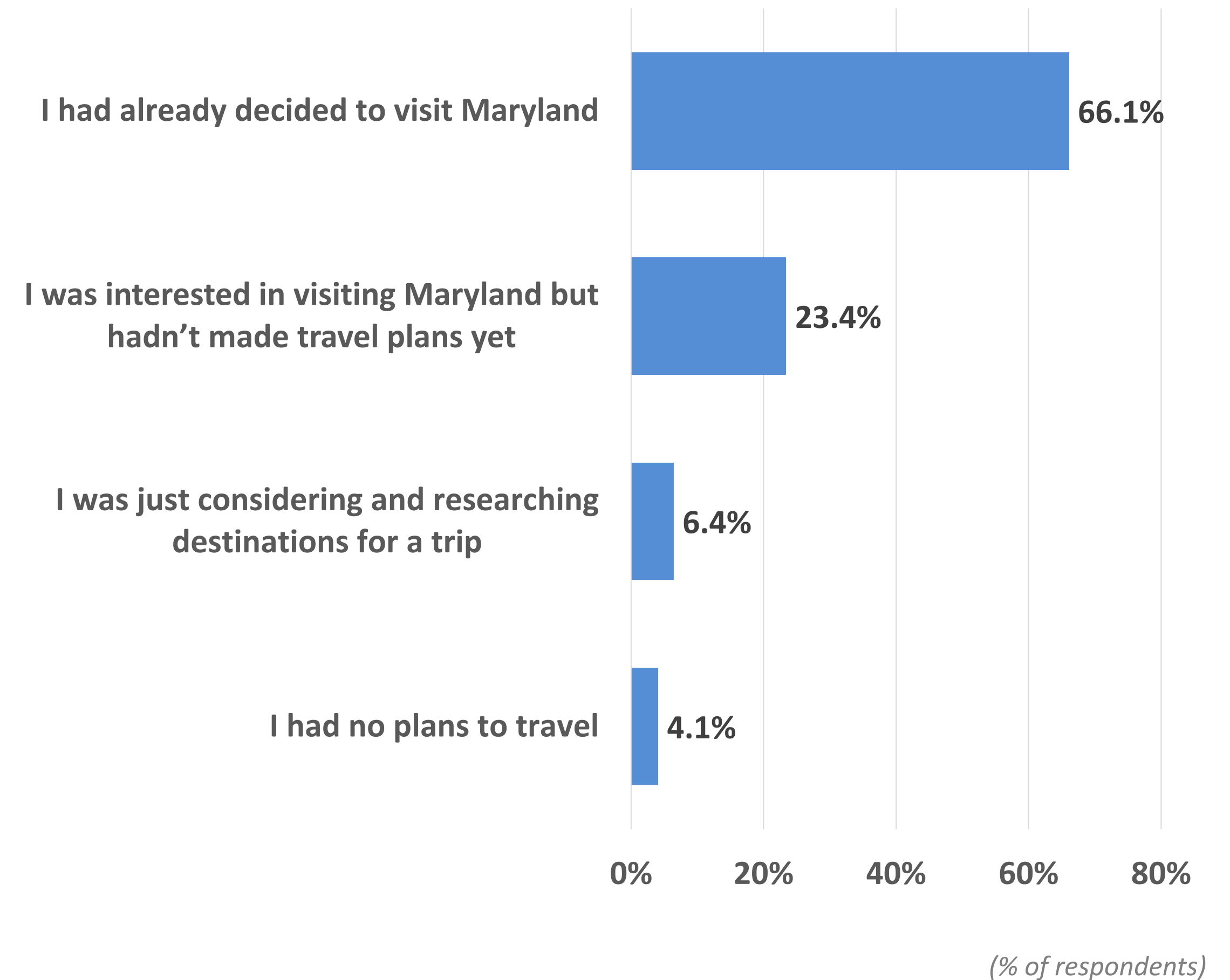
Question: How important was this advertising to your decision to visit Maryland? (Select one) Base: Respondents who visited Maryland in the past six months, recalled one or more ads tested and said these recalled ads influenced their decision to visit Maryland. 86 respondents.

# Point in Travel Decision When Exposed to Advertising

Maryland's 2019 advertising campaign was effective at reaching people at the top of the travel planning funnel. Those survey respondents who reported having made at least one trip to Maryland in the past six months and recalled seeing at least one of the ads tested were asked at what point in their decision process they were in when they saw this advertising. In total, 33.9 percent of this group were in a state of potential influence when exposed to the 2019 advertising campaign (i.e. interested in visiting Maryland, just considering destinations for a trip and had no plans to travel).

Question: When you saw the advertisement(s) for Maryland, where were you in the process of deciding to travel? (Please select the one option that best describes where you were in your travel decision) Base: Respondents who visited Maryland in the past six months and recalled one or more ads tested. 171 respondents.

Figure 38: Point in Travel Decision When Exposed to Advertising



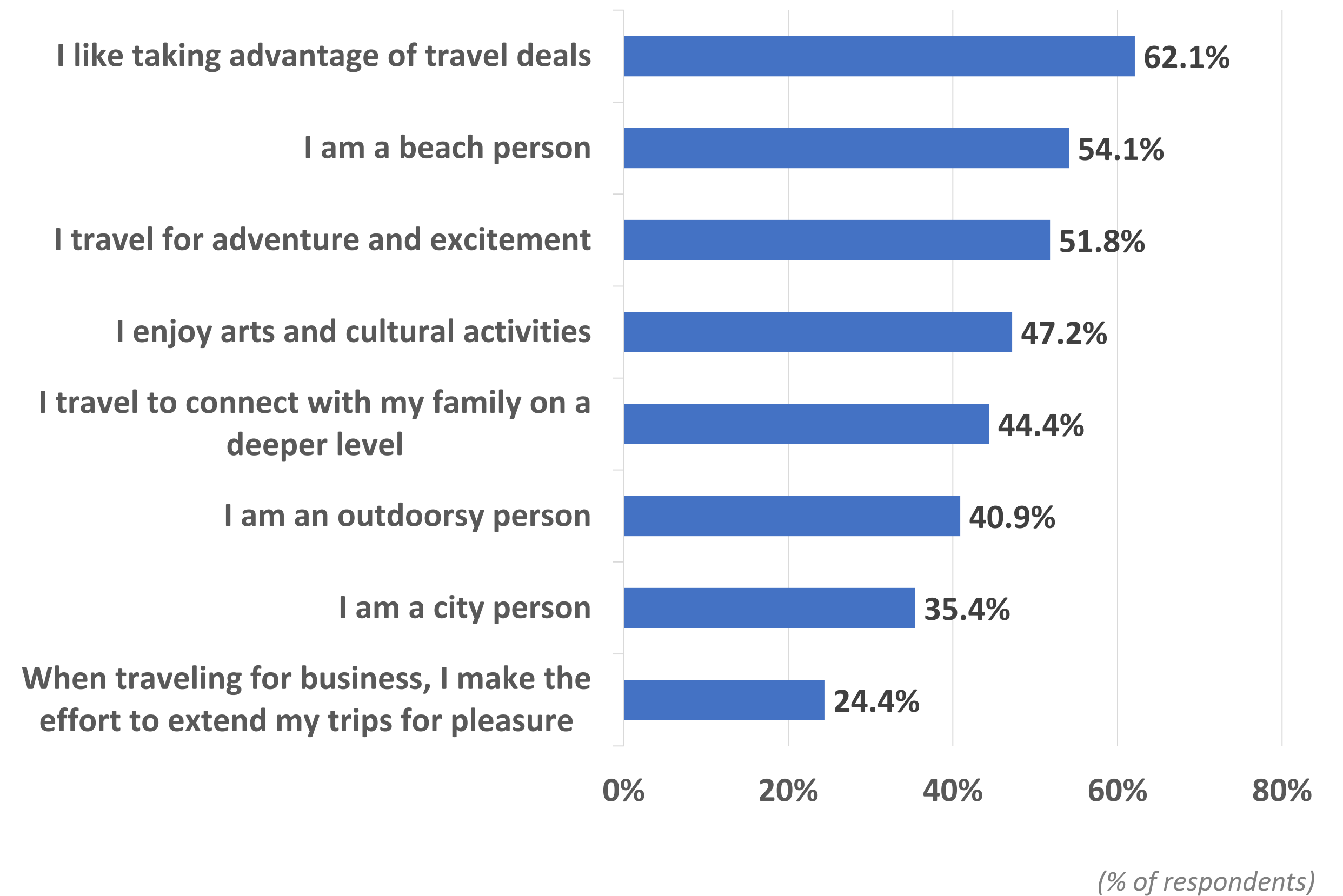


# RESPONDENT PSYCHOGRAPHICS & DEMOGRAPHICS

# Psychographics

Respondents were most likely to describe themselves as the type of travelers who like to take advantage of travel deals, oriented towards beach destinations and seek out adventure and excitement when they travel. Travelers from Maryland’s key markets were presented with a list of psychographic statements and asked to rate how well each described them on a 10-point scale. The chart at right shows the top-three box score (% rating each statement as an 8, 9 or 10). Although less likely to describe themselves in this way, two-in-five or more also said they enjoy cultural activities (47.2%), they use travel to connect with their family (44.4%) and consider themselves outdoor enthusiasts (40.9%).

**Figure 39: Psychographics—Top Three Box Score**  
(% Rating Each Statement as an 8, 9 or 10 on a 10-Point Scale)



Question: How well does each of the following describe you? Please use the scale below, in which “1” represents “Does not describe me at all” and “10” represents “Describes me completely.” Base: All respondents. 1,600 responses.



# Demographics

		<b>Ad-Exposed</b>	<b>Non-Ad Exposed</b>			
	<b>Total</b>	<b>(Recalled MD Advertisements)</b>	<b>(Did NOT Recall MD Ads)</b>	<b>Recent Visitor</b>	<b>Did Not Visit MD in Past 6 Months</b>	
<b>Age</b>	<b>Mean Age</b>	<b>51.1</b>	<b>50.7</b>	<b>51.2</b>	<b>50.1</b>	<b>51.8</b>
<b>Gender</b>	<b>Female</b>	55.6%	51.3%	56.4%	53.1%	57.3%
	<b>Male</b>	44.2%	48.7%	43.3%	46.5%	42.6%
	<b>Other</b>	0.2%	0.0%	0.2%	0.3%	0.1%
<b>Household Income</b>	<b>Mean Household Income</b>	<b>\$121,691</b>	<b>\$120,816</b>	<b>\$121,868</b>	<b>\$124,528</b>	<b>\$119,861</b>
<b>Formal Education</b>	<b>Postgraduate work/degree</b>	36.0%	35.7%	36.1%	38.9%	34.2%
	<b>College graduate</b>	42.1%	44.2%	41.7%	41.5%	42.3%
	<b>Some college</b>	12.9%	13.8%	12.7%	11.9%	13.6%
	<b>Trade / technical / vocational training</b>	4.4%	2.6%	4.7%	4.3%	4.4%
	<b>High school graduate</b>	4.5%	3.7%	4.7%	3.2%	5.3%
	<b>Some high school</b>	0.1%	0.0%	0.2%	0.2%	0.1%
	<b>Base</b>	1600	269	1331	624	973

# Demographics—Continued

		Total	Ad-Exposed (Recalled MD Advertisements)	Non-Ad Exposed (Did NOT Recall MD Ads)	Recent Visitor	Did Not Visit MD in Past 6 Months
Marital Status	Single	22.9%	22.7%	22.9%	20.8%	24.0%
	Married	69.4%	71.4%	68.9%	71.6%	68.1%
	Domestic partnership	5.4%	3.7%	5.8%	5.4%	5.5%
Children	Has children under 18 living in household	32.2%	45.0%	29.6%	37.9%	28.6%
Orientation	Heterosexual	95.2%	94.8%	95.3%	96.2%	94.8%
	Gay/lesbian/bisexual (LGBTQ)	4.2%	4.1%	4.2%	3.2%	4.7%
	Other	0.6%	1.1%	0.5%	0.6%	0.5%
Ethnicity	Caucasian/white	80.8%	73.6%	82.3%	76.3%	83.8%
	African-American/black	7.5%	14.5%	6.1%	11.1%	5.2%
	Asian	6.6%	5.6%	6.8%	7.9%	5.7%
	Hispanic/Latin American	3.1%	3.3%	3.0%	3.2%	3.0%
	Native American	0.8%	1.5%	0.7%	0.8%	0.8%
	Other	1.3%	1.5%	1.2%	0.8%	1.5%
Base		1600	624	973	269	1331



# APPENDIX

A scenic landscape featuring a red wooden covered bridge over a stream. The bridge has a green roof and a large arched opening. The surrounding area is lush with green grass and trees, some of which are in full bloom with pink blossoms. The word "APPENDIX" is overlaid in the center of the image in a large, black, sans-serif font.





# FY19 Spring/Summer Campaign

9.30.19





# Campaign Overview

## Objectives

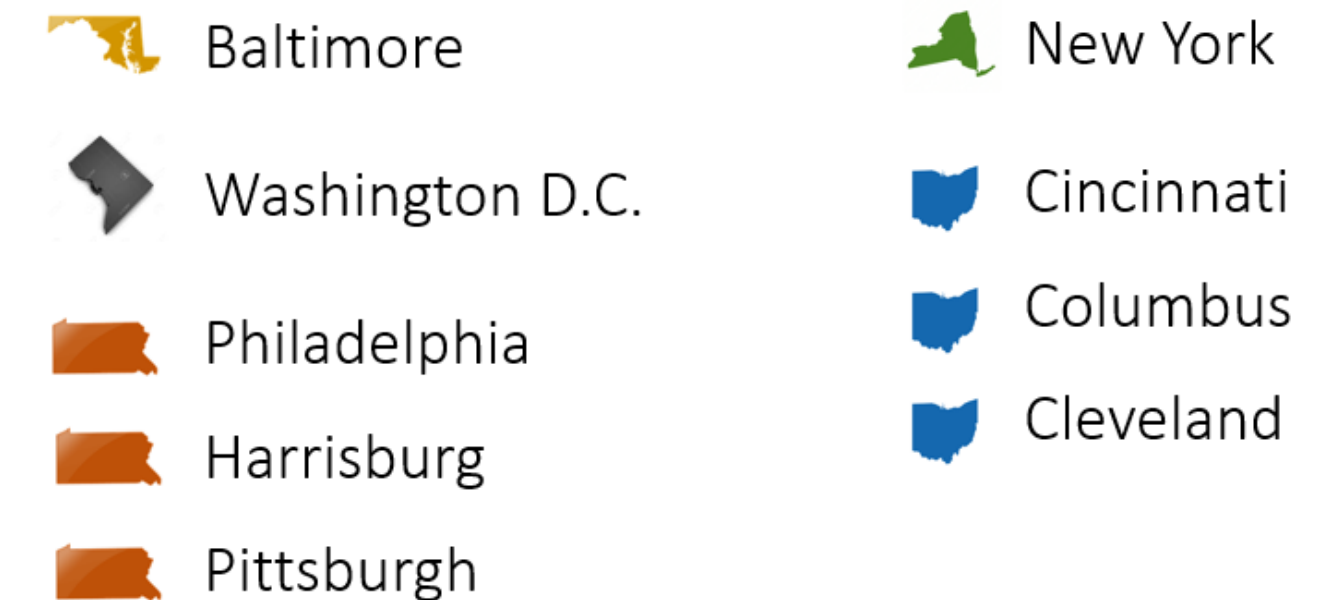
- Primary
  - Increase awareness of Maryland as a potential tourism destination
  - Increase overnight hotel stays
    - Hotel bookings revenue - set benchmarks to maximize YOY
    - Growth of tourism tax codes (901 & 111) from drive & focus market
- Secondary
  - Track and optimize onsite activities and key actions as related to tourism interest (e.g. brochure downloads, accommodations search)
  - Track overall engagement of landing page(s) from paid advertising (sessions, pages viewed, events searched)

## Strategies

- Leveraged insights from Spring/Summer 2018 media campaign to maximize for 2019:
  - Considered ROI of travel platforms when allocating dollars but look toward Adara IMPACT to provide a more direct comparison
- Evaluated and partnered with emerging vendor options (Conversant) and growing tactics (CTV) to grow reach
- Launched/flight tactics at the most relevant time (awareness stage vs planning stage)
- Maintained the market set in order to continue to build equity
- Included additional demographic target within current strategy that can be tested
- Focused strategy on primary KPI goals throughout
- Focused on consumer journey steps that will make the greatest impact on success

## Target Audience & Focus Markets

- HHI: range of \$75K-\$150K to include largest overnight segment
- Age: focus on the 25-54 range due to high overnight visits, higher income and higher activity participation – split into 4 segments (Water, Culinary, Diversity, General) to account for variances in media habits, lifestyle and attitudes
- Children: Not included as a filter so as not to limit communication to over 50% of the desired age/income target
- Added 55-74 age group to evaluate potential ROI of older demo



## Budget & Timing

\$1,438,678 / April - July

# Campaign Flight & Timing

Digital Ads launched on 4.29 as a 'second wave' to TV/awareness ads.

**Broadcast TV**  
Harrisburg, Pittsburgh, Cleveland (4/15-6/16)  
Balt, Philly, DC (4/29-5/26)

**Cable**  
NY Interconnect (4/15-6/16)

**Connected TV & OLV**  
Harrisburg, Pittsburgh, NY, Cleveland (4/15-6/16)

**Digital**  
Travel Platforms (Adara, Conversant, Sojern, Travel Spike, Trip Advisor) & Programmatic (4/29-7/22)

**Radio**  
Terrestrial Radio - Baltimore, Philadelphia & DC (5/13-6/16)

Medium	Unit	Target	Geo	2019																												Weeks	TRPs	Cost				
				JAN				FEB				MARCH				APRIL				MAY				JUNE				JULY										
				31	7	14	21	28	4	11	18	25	4	11	18	25	1	8	15	22	29	6	13	20	27	3	10	17	24	1	8	15	22					
<b>BROADCAST TV/CABLE</b>																														\$ 620,278								
<b>TV</b>	:15s/:30s	A35-64	DMA																																			
Harrisburg																				50	50	50	50	50	50	50	50	50	50	50	50					9	450	
Pittsburgh																				50	50	50	50	50	50	50	50	50	50	50	50					9	450	
Baltimore																					50	50	50	50								4	200					
Philadelphia																					50	50	50	50								4	200					
DC																					50	50	50	50								4	200					
Cleveland																				50	50	50	50	50	50	50	50					9	450					
<b>CABLE</b>	:30s	A35-64	Long Island/ N. NJ zones																																			
New York																				30	30	30	30	30	30	30	30					9	270					
<b>OTT (over-the-top)</b>																														\$ 245,000								
<b>Connected TV</b>	:30s	A25-39/travel intender	DMA																														EST					
Harrisburg																																9	183	\$ 35,000				
Pittsburgh																																9	181	\$ 50,000				
New York			Long Island/ N. NJ																													9	190	\$ 100,000				
Cleveland																																9	166	\$ 60,000				
<b>VIDEO</b>																														\$ 50,000								
<b>Pre-roll</b>	:15	travel intender	All																																			
																																9		\$ 50,000				
<b>DISPLAY/RETARGETING</b>																														\$ 413,400								
<b>Travel Platforms</b>	Banners	travel intender	All																																			
Adara																																9		\$ 40,000				
Conversant																																13		\$ 140,000				
Sojern																																9		\$ 60,000				
Travel Spike																																9		\$ 55,000				
Trip Advisor																																9		\$ 55,000				
<b>Programmatic</b>	Banners	travel intender	All																													9		\$ 50,000				
<b>Programmatic</b>	Banners	African American travel intender	Balt/Philly/DC																													9		\$ 10,000				
<b>Soul of America</b>	Sponsorship	African American travel intender	National with Baltimore focus																													8		\$ 3,400				
<b>AUDIO</b>																														\$ 110,000								
<b>Terrestrial</b>	:60	A25-64 Urban formats	Metro																																			
Baltimore		50 TRPs/wk																														5						
Philadelphia		25 TRPs/wk																														5						
DC		25 TRPs/wk																														5						
<b>SOCIAL</b>																														\$ 20,000								
<b>FB/IG/Pinterest</b>	boost/RT	travel intender thru-state traveler	All																													9		\$ 20,000				
<b>CONTINGENCY</b>																														\$ 11,166								
<b>All Markets:</b>																														\$ 1,469,844								
																														\$ 1,469,844								
																														\$ 1,469,844								

Cleveland Columbus Pittsburgh Harrisburg Baltimore DC Cincinnati Philadelphia New York

**TOTAL: BUDGET:**



# Campaign Markets

*Campaign targeted key markets based on performance, cost, proximity, and needs*

Activity period: 4/15/19 – 7/22/2019

Tier	Market	Broadcast TV	Cable	Video	Connected TV	Travel Platforms (Adara, Sojern, Conversant, Travel Spike, Trip Advisor)	Programmatic	Audio (Terrestrial)
Tier 1	Harrisburg	9 weeks		-	9 weeks	9 weeks (except for Conversant - 13 weeks)	9 weeks	-
	Pittsburgh	9 weeks		10 weeks	9 weeks			-
Tier 1A	New York		9 weeks	10 weeks	9 weeks			-
Tier 2	Baltimore	4 weeks		-	-			5 weeks
	Philadelphia	4 weeks		10 weeks	-			5 weeks
	Washington DC	4 weeks		10 weeks	-			5 weeks
Tier 3	Columbus	-		-	-			-
	Cleveland	9 weeks		10 weeks	9 weeks			-
	Cincinnati	-		10 weeks	-			-



# Campaign Creative (Digital)

16 different creative to test key motivational attributes for visiting Maryland (culinary & water) and showcase Maryland's diversity, cultural and heritage

Ads highlighted are some of the top performers in terms of CTR





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16 different creative to test key motivational attributes for visiting Maryland (culinary & water) and showcase Maryland's diversity, cultural and heritage

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