2014 Maryland Image Research

July 2014
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Introduction

- Longwoods International was retained to undertake an evaluation of Maryland’s image.

- This report presents the detailed study findings as they relate to:
  - *Maryland’s image as a travel destination* vs. *its key competitors*
  - *Awareness and visitation of various Maryland cities/towns and attractions*
The research was designed to provide:

- **Strategic image data**
  - What are the image factors and attributes that are important in destination selection?
  - What is Maryland’s image as a travel destination versus its key competitors: New Jersey, New York, Pennsylvania, Virginia, Washington, D. C.?

- Awareness and usage of various Maryland towns/cities and activities
Methodology

- The study surveyed travelers in Maryland’s advertising markets:
  - A traveler is defined as a person who has taken a day or overnight pleasure trip within the past 3 years, and intends to take one within the next two years. Also, respondents had to be 25 years or older and have a household income of $50,000 or greater. (75% of those screened met these requirements.)
  - The study was conducted via a major online consumer sample in the U.S.:
    - The sample was selected to be representative of the DMA markets being surveyed (Baltimore, Washington, D.C., Philadelphia, and New York DMAs)
    - A total of 1,001 travelers participated in the study
    - Data was weighted prior to analysis based on age, gender, income, household size, and market size.
The questionnaire included:

- Travel history
- Image of Maryland and its competitors (New Jersey, New York, Pennsylvania, Virginia, Washington, D.C.) as a travel destination on a battery of 81 attributes
- Intended visitation of Maryland in the next twelve months
- Awareness and visitation of Maryland towns/cities and attractions.
- Enjoyment of various activities consistent with Maryland’s offerings.
Executive Summary
Destination Awareness, Visitation & Interest

- On an unaided basis, Maryland is **not** mentioned as a destination that the respondents would enjoy visiting.
- Almost three fourths of the respondents (72%) have ever experienced Maryland. Only 50% in the past 2 years. Among destinations studied, Maryland is below New Jersey, Pennsylvania, Washington, DC and New York on these measures.
- Little more than half (57%) indicate they plan an overnight or day visit to Maryland in the next year, again below New Jersey, Pennsylvania, Washington, DC and New York.
- Among those intending to visit, they primarily plan to visit during the summer of 2014.
In order to determine the key factors that motivate travel and destination of choice, respondents are asked to rate selected states across a robust list of attributes or characteristics.

Statistical correlations are then used to establish the degree of association between each attribute and the overall rating, “A place I would really enjoy visiting.”

- A high correlation reveals an attribute to be an important motivator. The attributes with the highest correlations are referred to as ‘Hot Buttons’.
- A lower correlation reveals an attribute to be of lesser importance.

The Travel Motivating factors are calculations that reflect the aggregated importance across attributes related by subject.
For travelers, the top motivators for getting on the destination wish list are **excitement**, **family atmosphere**, followed by **adult appeal**:

- **The notion of excitement** comes from being seen as a fun, “once in a lifetime” experience and a sense of adventure
- **Family atmosphere**, includes being good for families and that children would enjoy
- **Adult appeal**, the perceived suitability for adults and couples

Several factors are of moderate importance individually; but they include some of the key rational features that bring to life the emotional excitement that attracts people to a destination:

- **Being popular** including being well-know, popular with travelers and noticing advertising
- **Being luxurious** including elegant restaurants, first-class hotels, great spas and B&Bs
Travel Motivators

- **Good sightseeing**, particularly the overall variety of things to see and do, and the interesting cities and towns
- **Being unique** including the travel experience, the scenery, and local people
- **A worry-free** environment, because being perceived as relaxed, safe and friendly are important
- **The opportunities for entertainment**, including shopping, theater, music and nightlife

- Relatively low on the priority list are:
  - **Climate**
  - **Being affordable**, well-priced vacation options and being close by
  - **Opportunities for sports and recreation** which is unfortunate since this is one of Maryland’s strengths
Maryland’s Image

- When examining Maryland’s image versus the competition of the summary variable of “a place I’d really enjoy visiting,”
  - Maryland is significantly lower than New York and Washington, DC with only New Jersey being lower.
  - The 2014 rating is lower than 2009 but all destinations saw a decrease on this dimension.

- For the summary variable of “excellent value for the money,”
  - Maryland is near the top of the competitive states with only Pennsylvania slightly higher.
  - The 2014 rating is lower than 2009 but all destinations saw a decrease on this dimension. The drop for New Jersey and New York was much greater than other destinations.
Maryland’s Image (Cont’d)

- Across all the travel motivators, in comparison to other states evaluated in this study, Maryland’s overall level of appeal:
  - Lags significantly behind New York, Washington, DC, Pennsylvania and Virginia
  - Is at similar levels to New Jersey

- Maryland is perceived higher than most states as a better sports and recreation destination and being affordable.

- Maryland is in the upper half of the competition for worry free and climate.

- Among the respondent’s markets, Baltimore rates Maryland the highest.
Maryland’s Image (Cont’d)

- Maryland’s image strengths versus these competitors as a group are:
  - Noted for the Star Spangled Banner
  - Great for boating/sailing
  - Unique costal/waterfront areas
  - Unique local cuisine
  - Great beaches
  - Great for swimming/water sports
  - A good place to relax

- None of these strengths are considered to be important to the travel decision.
Maryland’s Image (Cont’d)

Nonetheless, travelers perceive some significant disadvantages to visiting Maryland relative to the competition, the most important of which are:

- Well known destination
- Great for theater and arts
- Well-known landmarks
- Excellent museums/galleries
- Popular with travelers
- Lots to see and do
- Exciting nightlife/entertainment
- Great for sightseeing
- Elegant restaurants
- Interesting historic areas
- Unique travel experience

Circled items are considered important image items or hot buttons for travelers
## Image of Maryland vs. New Jersey

<table>
<thead>
<tr>
<th>Maryland Better For…</th>
<th>New Jersey Better For…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Noted for the Star Spangled Banner</td>
<td>Exciting gambling venues</td>
</tr>
<tr>
<td>Noted for Civil War history</td>
<td>Exciting nightlife/entertainment</td>
</tr>
<tr>
<td>Unique local cuisine</td>
<td>Great theme/amusement parks</td>
</tr>
<tr>
<td>Warm, friendly people</td>
<td>Give live music</td>
</tr>
<tr>
<td>Noted for history</td>
<td>Great for swimming/water sports</td>
</tr>
<tr>
<td>Interesting historic sites</td>
<td>Often notice advertising</td>
</tr>
<tr>
<td>Noted for Harriet Tubman &amp; the Underground Railroad</td>
<td></td>
</tr>
<tr>
<td>Interesting historic areas</td>
<td></td>
</tr>
<tr>
<td>Beautiful countryside</td>
<td></td>
</tr>
</tbody>
</table>
Image of Maryland vs. New York

**Maryland Better For…**
- Noted for the Star Spangled Banner
- Noted for Civil War history
- A good place to relax
- Affordable accommodations
- Affordable to eat there
- Great for swimming/water sports
- Warm, friendly people
- Safe anywhere

**New York Better For…**
- Great shopping
- Well-known destination
- Popular with travelers
- Elegant restaurants
- Excellent museums/ galleries
- An exciting place
- Well-known landmarks
- Noted for its architecture
- Lots to see and do

Circled items are considered important image items or hot buttons for travelers
## Image of Maryland vs. Pennsylvania

<table>
<thead>
<tr>
<th>Maryland Better For…</th>
<th>Pennsylvania Better For…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Noted for the Star Spangled Banner</td>
<td>Well-known landmarks</td>
</tr>
<tr>
<td>Unique local cuisine</td>
<td>Interesting historic areas</td>
</tr>
<tr>
<td>Great for professional sports</td>
<td>Noted for its history</td>
</tr>
<tr>
<td>Great for boating/sailing</td>
<td>Great theme/amusement parks</td>
</tr>
<tr>
<td>Not too far away</td>
<td>Great for skiing/snowboarding</td>
</tr>
<tr>
<td></td>
<td>Excellent museums/ galleries</td>
</tr>
<tr>
<td></td>
<td>Interesting historic sites</td>
</tr>
<tr>
<td></td>
<td>Great shopping</td>
</tr>
<tr>
<td></td>
<td>Different cultures/ways of life</td>
</tr>
</tbody>
</table>
Maryland Better For…
- Noted for the Star Spangled Banner
- Unique local cuisine
- Great for professional sports
- Great for boating/sailing
- Not too far away

Virginia Better For…
- Great theme/amusement parks
- Noted for its history
- Interesting historic areas
- Noted for Civil War history
- Beautiful countryside
- Noted for its architecture
- Well-known landmarks
- Great sightseeing
### Image of Maryland vs. Washington, DC

<table>
<thead>
<tr>
<th>Maryland Better For...</th>
<th>Washington, DC Better For...</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Great for boating/sailing</td>
<td>• Excellent museums/ galleries</td>
</tr>
<tr>
<td>• Great beaches</td>
<td>• Noted for its architecture</td>
</tr>
<tr>
<td>• Great fishing</td>
<td>• Well-known destination</td>
</tr>
<tr>
<td>• Unique coastal/waterfront areas</td>
<td>• Popular with travelers</td>
</tr>
<tr>
<td>• Good place for camping</td>
<td>• Well-known landmarks</td>
</tr>
<tr>
<td>• Great for swimming/water sports</td>
<td>• Great for sightseeing</td>
</tr>
<tr>
<td></td>
<td>• Lots to see and do</td>
</tr>
<tr>
<td></td>
<td>• Interesting place</td>
</tr>
<tr>
<td></td>
<td>• Great for theatre and arts</td>
</tr>
<tr>
<td></td>
<td>• Interesting historic areas</td>
</tr>
</tbody>
</table>

Circled items are considered important image items or hot buttons for travelers.
Maryland’s Product Delivery

- The image ratings we just discussed looked at perceptions of Maryland and the competition among the broad population of potential travelers. Within that broad population there are people who have visited Maryland in the recent past, i.e. who have experienced Maryland’s product, and some who haven’t.

- The analysis that follows examines recent visitors’ image of Maryland based on recent experience (“product delivery”) compared to the image ratings of those who have never actually visited, i.e., whose perceptions are based on “pure image”.

- This is essentially the difference between the expectations of those who have not been to Maryland vs. the experiences of those who have. When the experience falls short of expectations, there may be a problem with the product. When experience exceeds expectations, there is a great opportunity to educate those who don’t know how wonderful Maryland is.
Product Delivery Impacts

- The image ratings for Maryland are higher among Maryland visitors on all dimensions as compared to those who have not visited. However, these levels are lower than Longwoods normally sees in these comparisons.
- Past experience strongly influenced the perception of Maryland as being affordable.
- Hot Button notably impacted include:
  - Lots to see and do
- Three items are lower once the traveler has experienced Maryland:
  - Great theme/amusement parks
  - Great for golfers
  - Safe anywhere
Baltimore, Annapolis and Ocean City have the highest awareness and visitation among Maryland cities and towns. Each of these cities have a higher than average awareness/visitation ratio.

Other cities and towns with higher than average ratios include the Eastern Shore, National Harbor and Ellicott City.
Maryland Attractions
Awareness and Visitation

- Of the Maryland attractions, the Chesapeake Bay, the Baltimore Inner Harbor, and U.S. Naval Academy have the highest awareness.
- Those attractions that have higher average awareness/visitation ratio are Chesapeake Bay, Baltimore Inner Harbor (the highest), National Aquarium, Oriole Park, Ft. McHenry National Monument, Assateague Island, Deep Lake Creek, Rocky Gap, Smith Island and Canal Place. However, some of these attractions do have low awareness.
Maryland Activity Interest

- The highest rated activities for “would really enjoy” include:
  - Bay/ ocean/ harbor side dining
  - Local seafood restaurant
  - Historic town
  - Beach
  - Historic monument/fort/home
Destination Awareness, Visitation & Interest
Destinations Would Enjoy Visiting (Unaided)

- Florida: 19%
- California: 17%
- Italy: 14%
- Hawaii: 13%
- Asia: 12%
- Las Vegas: 12%
- Caribbean: 11%
- France: 10%
Destinations Would Enjoy Visiting (Unaided) – (Cont’d)

- Australia/New Zealand: 9%
- United Kingdom: 8%
- Other South America: 6%
- Canada: 6%
- Arizona: 6%
- Africa: 5%
- Disney/FL: 5%
- China: 5%
- Spain: 4%
- Middle East: 3%
- Germany: 3%
Destinations Ever Visited

- New Jersey: 86%
- Pennsylvania: 86%
- Washington, DC: 85%
- New York: 83%
- Maryland: 72%
- Virginia: 70%
Destinations Ever Visited — Overnight vs. Day Trips

- Pennsylvania: Overnight Trip 69%, Day Trip 58%
- New Jersey: Overnight Trip 64%, Day Trip 64%
- Washington, DC: Overnight Trip 62%, Day Trip 52%
- Virginia: Overnight Trip 62%, Day Trip 36%
- New York: Overnight Trip 61%, Day Trip 60%
- Maryland: Overnight Trip 52%, Day Trip 50%
Destinations Visited in the Past 2 Years

- New Jersey: 72%
- New York: 68%
- Pennsylvania: 64%
- Washington, DC: 58%
- Maryland: 50%
- Virginia: 48%
Destinations Visited in the Past Two Years — Overnight vs. Day Trips

<table>
<thead>
<tr>
<th>Destination</th>
<th>Overnight Trip</th>
<th>Day Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Jersey</td>
<td>50%</td>
<td>49%</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>46%</td>
<td>36%</td>
</tr>
<tr>
<td>New York</td>
<td>41%</td>
<td>46%</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>37%</td>
<td>33%</td>
</tr>
<tr>
<td>Virginia</td>
<td>35%</td>
<td>25%</td>
</tr>
<tr>
<td>Maryland</td>
<td>34%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Percent
Intend to Visit Within the Next Year

- Pennsylvania: 74%
- New York: 72%
- New Jersey: 71%
- Washington, DC: 63%
- Virginia: 58%
- Maryland: 57%

Percent Definitely/Probably Intend
Intend to Visit in the Next Year — Overnight vs. Day Trips

- New Jersey: 54% Overnight, 68% Day Trip
- New York: 61% Overnight, 68% Day Trip
- Virginia: 43% Overnight, 51% Day Trip
- Pennsylvania: 49% Overnight, 60% Day Trip
- Maryland: 48% Overnight, 52% Day Trip
- Washington, DC: 48% Overnight, 53% Day Trip
Past Visits vs. Intentions

- Pennsylvania: Intend in Next Yr. 74%, Visited in Past Yr. 32%
- New York: Intend in Next Yr. 72%, Visited in Past Yr. 34%
- New Jersey: Intend in Next Yr. 71%, Visited in Past Yr. 36%
- Washington, DC: Intend in Next Yr. 63%, Visited in Past Yr. 29%
- Virginia: Intend in Next Yr. 58%, Visited in Past Yr. 24%
- Maryland: Intend in Next Yr. 57%, Visited in Past Yr. 25%

* Annualized from Visited in Past 2 Years
Timing of Intended Trips to Maryland

Day Trips

<table>
<thead>
<tr>
<th>Period</th>
<th>Percent Who Intend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Now and May 31, 2014</td>
<td>24</td>
</tr>
<tr>
<td>June 1 and Sep 30, 2014</td>
<td>43</td>
</tr>
<tr>
<td>Oct 1, 2014 and Mar 31, 2015</td>
<td>30</td>
</tr>
<tr>
<td>Mar 31, 2015</td>
<td>30</td>
</tr>
</tbody>
</table>

Overnight Trips

<table>
<thead>
<tr>
<th>Period</th>
<th>Percent Who Intend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Now and May 31, 2014</td>
<td>21</td>
</tr>
<tr>
<td>June 1 and Sep 30, 2014</td>
<td>33</td>
</tr>
<tr>
<td>Oct 1, 2014 and Mar 31, 2015</td>
<td>24</td>
</tr>
<tr>
<td>Mar 31, 2015</td>
<td>28</td>
</tr>
</tbody>
</table>
Travel Motivators and Hot Buttons
Travel Motivators

- Exciting
- Family Atmosphere
- Adult Appeal
- Popular
- Luxurious
- Sightseeing
- Unique
- Worry Free
- Entertainment
- Climate
- Affordability
- Sports & Recreation

Relative Importance*

*A measure of the degree of association between each factor and whether destination is a place “I would really enjoy visiting.”
<table>
<thead>
<tr>
<th><strong>Top 10 Hot Buttons</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>A fun place</td>
</tr>
<tr>
<td>Good for families</td>
</tr>
<tr>
<td>Must see destination</td>
</tr>
<tr>
<td>An interesting place</td>
</tr>
<tr>
<td>An exciting place</td>
</tr>
<tr>
<td>Unique travel experience</td>
</tr>
<tr>
<td>Lots of things to see and do</td>
</tr>
<tr>
<td>Well-known destination</td>
</tr>
<tr>
<td>Good for couples</td>
</tr>
<tr>
<td>A real adventure</td>
</tr>
</tbody>
</table>
Maryland’s Image
Maryland’s Image vs. the Competition
Maryland’s Overall Image vs. The Competition

“A Place I’d Really Enjoy Visiting”

Base: Total Travelers

<table>
<thead>
<tr>
<th>State</th>
<th>2014</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>70</td>
<td>65</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>64</td>
<td>64</td>
</tr>
<tr>
<td>Virginia</td>
<td>59</td>
<td>59</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>52</td>
<td>52</td>
</tr>
<tr>
<td>Maryland</td>
<td>47</td>
<td>47</td>
</tr>
<tr>
<td>New Jersey</td>
<td>39</td>
<td>39</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree
Maryland’s Overall Image vs. The Competition

“Excellent Value for the Money”

Base: Total Travelers

<table>
<thead>
<tr>
<th>State</th>
<th>2014</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pennsylvania</td>
<td>52</td>
<td>58</td>
</tr>
<tr>
<td>Maryland</td>
<td>47</td>
<td>54</td>
</tr>
<tr>
<td>Virginia</td>
<td>47</td>
<td>53</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>New Jersey</td>
<td>39</td>
<td>57</td>
</tr>
<tr>
<td>New York</td>
<td>33</td>
<td>47</td>
</tr>
</tbody>
</table>
Maryland’s Image vs. Competitors*

* Key competitors: New Jersey, New York, Pennsylvania, Virginia, Washington, DC

Base: Total Travelers

- Exciting: Maryland 44% vs. Competitors 55%
- Family Atmosphere: Maryland 52% vs. Competitors 56%
- Adult Appeal: Maryland 53% vs. Competitors 59%
- Popular: Maryland 53% vs. Competitors 57%
- Luxurious: Maryland 51% vs. Competitors 57%
- Sightseeing: Maryland 46% vs. Competitors 53%
- Unique: Maryland 46% vs. Competitors 53%
- Worry Free: Maryland 46% vs. Competitors 51%
- Entertainment: Maryland 36% vs. Competitors 48%
- Climate: Maryland 47% vs. Competitors 56%
- Affordability: Maryland 46% vs. Competitors 53%
- Sports & Recreation: Maryland 48% vs. Competitors 56%

Percent Who Strongly Agree

[Bar chart with comparisons between Maryland and competitors for various attributes]
Maryland’s Image 2014 vs. 2009

<table>
<thead>
<tr>
<th>Feature</th>
<th>2014</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exciting</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td>Family Atmosphere</td>
<td>52%</td>
<td>55%</td>
</tr>
<tr>
<td>Adult Appeal</td>
<td>53%</td>
<td>58%</td>
</tr>
<tr>
<td>Popular</td>
<td>40</td>
<td>47</td>
</tr>
<tr>
<td>Luxurious</td>
<td>41</td>
<td>44</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>44</td>
<td>49</td>
</tr>
<tr>
<td>Unique</td>
<td>43</td>
<td>47</td>
</tr>
<tr>
<td>Worry Free</td>
<td>47</td>
<td>51</td>
</tr>
<tr>
<td>Entertainment</td>
<td>47</td>
<td>52</td>
</tr>
<tr>
<td>Sports &amp; Recreation</td>
<td>48</td>
<td>60</td>
</tr>
<tr>
<td>Affordability</td>
<td>48</td>
<td>56</td>
</tr>
</tbody>
</table>

* Key competitors: New Jersey, New York, Pennsylvania, Virginia, Washington, DC

Base: Total Travelers
Maryland Image vs. Competitors — Exciting

Base: Total Travelers

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>70</td>
<td>72</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>60</td>
<td>66</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>52</td>
<td>43</td>
</tr>
<tr>
<td>Virginia</td>
<td>49</td>
<td>55</td>
</tr>
<tr>
<td>New Jersey</td>
<td>44</td>
<td>44</td>
</tr>
<tr>
<td>Maryland</td>
<td>44</td>
<td>44</td>
</tr>
</tbody>
</table>
Maryland Image vs. Competitors — Exciting

- Exciting
- A fun place
- Must see destination
- An exciting place
- A real adventure

Base: Total Travelers

<table>
<thead>
<tr>
<th></th>
<th>Maryland</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exciting</td>
<td>44</td>
<td>55</td>
</tr>
<tr>
<td>A fun place</td>
<td>48</td>
<td>57</td>
</tr>
<tr>
<td>Must see destination</td>
<td>55</td>
<td>67</td>
</tr>
<tr>
<td>An exciting place</td>
<td>38</td>
<td>51</td>
</tr>
<tr>
<td>A real adventure</td>
<td>35</td>
<td>44</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree
Maryland Image vs. Competitors — Family Atmosphere

Base: Total Travelers
Maryland Image vs. Competitors — Family Atmosphere

<table>
<thead>
<tr>
<th>Category</th>
<th>Maryland</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family Atmosphere</td>
<td>52%</td>
<td>56%</td>
</tr>
<tr>
<td>Good for families</td>
<td>61%</td>
<td>63%</td>
</tr>
<tr>
<td>Children would enjoy</td>
<td>43%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Base: Total Travelers

Percent Who Strongly Agree

- Maryland
- Competitors
Maryland Image vs. Competitors — Adult Appeal

Base: Total Travelers

<table>
<thead>
<tr>
<th>State</th>
<th>2014</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>71</td>
<td>73</td>
</tr>
<tr>
<td>Virginia</td>
<td>58</td>
<td>67</td>
</tr>
<tr>
<td>Pennsylvania</td>
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<tr>
<td>Maryland</td>
<td>53</td>
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</table>
Maryland Image vs. Competitors — Adult Appeal

Base: Total Travelers

<table>
<thead>
<tr>
<th></th>
<th>Percent Who Strongly Agree</th>
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<tbody>
<tr>
<td><strong>Adult Appeal</strong></td>
<td>Maryland: 53</td>
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<tr>
<td></td>
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<tr>
<td><strong>Good for couples</strong></td>
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<tr>
<td></td>
<td>Competitors: 57</td>
</tr>
<tr>
<td><strong>Good for an adult vacation</strong></td>
<td>Maryland: 52</td>
</tr>
<tr>
<td></td>
<td>Competitors: 61</td>
</tr>
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</table>

Base: Total Travelers
Maryland Image vs. Competitors — Popular

Base: Total Travelers

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>State</th>
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</tr>
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<td>Maryland</td>
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Maryland Image vs. Competitors — Popular

Base: Total Travelers

<table>
<thead>
<tr>
<th>Aspect</th>
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<tbody>
<tr>
<td>Popular</td>
<td>40</td>
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<tr>
<td>Well-known destination</td>
<td>43</td>
<td>64</td>
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<tr>
<td>Popular with travelers</td>
<td>42</td>
<td>60</td>
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<tr>
<td>Often notice advertising</td>
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</table>
Maryland Image vs. Competitors
— Luxurious

Base: Total Travelers

<table>
<thead>
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<td>Virginia</td>
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<td>44</td>
</tr>
<tr>
<td>Maryland</td>
<td>41</td>
<td>44</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree

2014 vs. 2009
Maryland Image vs. Competitors — Luxurious

Base: Total Travelers

Luxurious
- Maryland: 41%
- Competitors: 51%

Elegant restaurants
- Maryland: 40%
- Competitors: 55%

First-class hotels/resorts
- Maryland: 45%
- Competitors: 58%

Great spas
- Maryland: 33%
- Competitors: 42%

Great inns/B&Bs
- Maryland: 46%
- Competitors: 49%
Maryland Image vs. Competitors — Sightseeing

Base: Total Travelers

<table>
<thead>
<tr>
<th>State</th>
<th>2014</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pennsylvania</td>
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<tr>
<td>Maryland</td>
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<td>49</td>
</tr>
<tr>
<td>New Jersey</td>
<td>36</td>
<td>41</td>
</tr>
</tbody>
</table>
Maryland Image vs. Competitors — Sightseeing

Base: Total Travelers

- Sightseeing: Maryland 46%, Competitors 53%
- Interesting place: Maryland 46%, Competitors 60%
- Lots to see and do: Maryland 43%, Competitors 61%
- Interesting historic sites: Maryland 54%, Competitors 65%
- Great for sightseeing: Maryland 42%, Competitors 59%
- Truly beautiful scenery/setting: Maryland 48%, Competitors 54%
- Great for walking/strolling: Maryland 47%, Competitors 56%

Percent Who Strongly Agree

Maryland | Competitors
Maryland Image vs. Competitors — Sightseeing (Cont’d)

Base: Total Travelers

- Sightseeing
- Interesting historic areas
- Well-known landmarks
- Beautiful gardens and parks
- Great shopping
- Excellent museums/galleries
- Interesting small towns/villages
- Noted for its architecture
- Noted for its history

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Feature</th>
<th>Maryland</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing</td>
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<td>53</td>
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<tr>
<td>Interesting historic areas</td>
<td>49</td>
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<tr>
<td>Well-known landmarks</td>
<td>44</td>
<td>64</td>
</tr>
<tr>
<td>Beautiful gardens and parks</td>
<td>44</td>
<td>55</td>
</tr>
<tr>
<td>Great shopping</td>
<td>36</td>
<td>50</td>
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<tr>
<td>Excellent museums/galleries</td>
<td>39</td>
<td>58</td>
</tr>
<tr>
<td>Interesting small towns/villages</td>
<td>44</td>
<td>46</td>
</tr>
<tr>
<td>Noted for its architecture</td>
<td>32</td>
<td>53</td>
</tr>
<tr>
<td>Noted for its history</td>
<td>53</td>
<td>67</td>
</tr>
</tbody>
</table>
Maryland Image vs. Competitors — Sightseeing (Cont’d)

Base: Total Travelers

- **Sightseeing**: 46% (Maryland) vs. 53% (Competitors)
- **Great for antiquing**: 47% vs. 46%
- **Beautiful countryside**: 52% vs. 52%
- **Great farmers' markets/agri-tourism**: 47% vs. 46%
- **Noted for Civil War History**: 51% vs. 51%
- **Great wineries**: 34% vs. 39%
- **Noted for Harriett Tubman & the Underground Railroad**: 37% vs. 44%
- **Noted for the Star Spangled Banner**: 36% vs. 61%
Maryland Image vs. Competitors — Unique

Base: Total Travelers

<table>
<thead>
<tr>
<th>State</th>
<th>2014</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>55</td>
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<tr>
<td>Virginia</td>
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<tr>
<td>Maryland</td>
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<td>47</td>
</tr>
<tr>
<td>New Jersey</td>
<td>37</td>
<td>38</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree
Maryland Image vs. Competitors — Unique

- Unique travel experience
- Truly unique scenery
- Interesting local people
- Different cultures/ways of life
- Interesting customs/traditions
- Unique coastal/waterfront areas
- Unique local cuisine

Base: Total Travelers
Maryland’s Image vs. Competitors — Worry Free

Base: Total Travelers

<table>
<thead>
<tr>
<th>State</th>
<th>2014</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virginia</td>
<td>61</td>
<td>57</td>
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<td>Washington, DC</td>
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<td>New Jersey</td>
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<td>41</td>
</tr>
<tr>
<td>New York</td>
<td>35</td>
<td>38</td>
</tr>
</tbody>
</table>
Maryland Image vs. Competitors — Worry Free

Base: Total Travelers

- Worry Free
  - Percent Who Strongly Agree:
    - Maryland: 51%
    - Competitors: 44%

- Safe in tourist areas
  - Percent Who Strongly Agree:
    - Maryland: 62%
    - Competitors: 54%

- A good place to relax
  - Percent Who Strongly Agree:
    - Maryland: 58%
    - Competitors: 50%

- Warm, friendly people
  - Percent Who Strongly Agree:
    - Maryland: 41%
    - Competitors: 39%

- Safe anywhere
  - Percent Who Strongly Agree:
    - Maryland: 38%
    - Competitors: 36%
Maryland Image vs. Competitors — Entertainment

Base: Total Travelers

Percent Who Strongly Agree

Maryland Image vs. Competitors — Entertainment

- Entertainment: Maryland 36% vs. Competitors 48%
- Interesting festivals/fairs/events: Maryland 40% vs. Competitors 51%
- Great live music: Maryland 37% vs. Competitors 49%
- Exciting nightlife/entertainment: Maryland 33% vs. Competitors 50%
- Great for theatre and the performing arts: Maryland 31% vs. Competitors 52%
- Great for professional sports: Maryland 45% vs. Competitors 51%
- Great theme/amusement parks: Maryland 34% vs. Competitors 46%
- Exciting gambling venues: Maryland 32% vs. Competitors 39%

Base: Total Travelers
Maryland Image vs. Competitors — Climate

Base: Total Travelers

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pennsylvania</td>
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<tr>
<td>Virginia</td>
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<td>54</td>
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<tr>
<td>Maryland</td>
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<td>Washington, DC</td>
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<td>New York</td>
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<td>46</td>
</tr>
<tr>
<td>New Jersey</td>
<td>42</td>
<td>49</td>
</tr>
</tbody>
</table>
Maryland Image vs. Competitors — Climate

Base: Total Travelers

Percent Who Strongly Agree

- **Climate**: 47% (Maryland), 46% (Competitors)
- **Good weather in the fall**: 58% (Maryland), 58% (Competitors)
- **Good weather in the spring**: 56% (Maryland), 53% (Competitors)
- **Good weather in the summer**: 52% (Maryland), 49% (Competitors)
- **Great climate overall**: 37% (Maryland), 34% (Competitors)
- **Great for a winter trip**: 29% (Maryland), 34% (Competitors)
Maryland Image vs. Competitors — Affordability

Base: Total Travelers

Percent Who Strongly Agree

- Pennsylvania: 59% (2014), 65% (2009)
- Maryland: 56% (2014), 60% (2009)
- Virginia: 54% (2014), 58% (2009)
- New Jersey: 53% (2014), 66% (2009)
- Washington, DC: 49% (2014), 52% (2009)
- New York: 48% (2014), 54% (2009)
Maryland Image vs. Competitors — Affordability

Base: Total Travelers

- **Affordability**
  - Maryland: 56%
  - Competitors: 53%

- **Easy to get to**
  - Maryland: 64%
  - Competitors: 63%

- **Affordable to get to**
  - Maryland: 58%
  - Competitors: 56%

- **Not too far away**
  - Maryland: 68%
  - Competitors: 66%

- **Affordable to eat there**
  - Maryland: 46%
  - Competitors: 41%

- **Affordable accommodations**
  - Maryland: 45%
  - Competitors: 41%

Percent Who Strongly Agree

- **Maryland**
- **Competitors**
Maryland Image vs. Competitors — Sports and Recreation

Base: Total Travelers

<table>
<thead>
<tr>
<th>State</th>
<th>2014</th>
<th>2009</th>
</tr>
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<tbody>
<tr>
<td>Virginia</td>
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<td>New York</td>
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<tr>
<td>Washington, DC</td>
<td>27</td>
<td>52</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree
Maryland Image vs. Competitors — Sports and Recreation

Base: Total Travelers

- Sports & Recreation
- Great for bicycling
- Great conservation areas
- Good for hiking/backpacking
- Good place for camping
- Great for kayaking/canoeing/rafting
- Good for viewing wildlife/birds
- Great fishing

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Activity</th>
<th>Maryland</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports &amp; Recreation</td>
<td>48</td>
<td>54</td>
</tr>
<tr>
<td>Great for bicycling</td>
<td>48</td>
<td>54</td>
</tr>
<tr>
<td>Great conservation areas</td>
<td>48</td>
<td>50</td>
</tr>
<tr>
<td>Good for hiking/backpacking</td>
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<td>47</td>
</tr>
<tr>
<td>Good place for camping</td>
<td>51</td>
<td>51</td>
</tr>
<tr>
<td>Great for kayaking/canoeing/rafting</td>
<td>43</td>
<td>40</td>
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<tr>
<td>Good for viewing wildlife/birds</td>
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<td>46</td>
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<tr>
<td>Great fishing</td>
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<td>43</td>
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</table>

Base: Total Travelers
Maryland Image vs. Competitors — Sports and Recreation (Cont’d)

Base: Total Travelers

<table>
<thead>
<tr>
<th>Activity</th>
<th>Maryland</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports &amp; Recreation</td>
<td>48</td>
<td>43</td>
</tr>
<tr>
<td>Great camping/RV facilities</td>
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<tr>
<td>Great for swimming/ water sports</td>
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<td>42</td>
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<tr>
<td>Great for boating/sailing</td>
<td>59</td>
<td>42</td>
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<tr>
<td>Great for golfers</td>
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<td>42</td>
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<tr>
<td>Great for hunting</td>
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<td>37</td>
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<tr>
<td>Great for skiing/snowboarding</td>
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<td>40</td>
</tr>
<tr>
<td>Great beaches</td>
<td>53</td>
<td>40</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree
Maryland Image Strengths vs. Competitors

Base: Total Travelers

- Noted for the Star Spangled Banner: 25%
- Great for boating/sailing: 17%
- Unique coastal/waterfront areas: 16%
- Unique local cuisine: 13%
- Great beaches: 12%
- Great for swimming/water sports: 8%
- A good place to relax: 8%
- Great fishing: 8%

Difference in Percent Who Strongly Agree
Maryland Image Strengths vs. Competitors (Cont’d)

<table>
<thead>
<tr>
<th>Strength</th>
<th>Difference in Percent Who Strongly Agree</th>
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<tbody>
<tr>
<td>Noted for Harriett Tubman &amp; the Underground Railroad</td>
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<tr>
<td>Affordable to eat there</td>
<td>7</td>
</tr>
<tr>
<td>Great for bicycling</td>
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</tr>
<tr>
<td>Warm, friendly people</td>
<td>5</td>
</tr>
<tr>
<td>Great for golfers</td>
<td>5</td>
</tr>
<tr>
<td>Safe anywhere</td>
<td>5</td>
</tr>
<tr>
<td>Good place for camping</td>
<td>5</td>
</tr>
</tbody>
</table>
Maryland Image Weaknesses vs. Competitors

Base: Total Travelers

- Well-known destination
- Great for theatre and the performing arts
- Well-known landmarks
- Excellent museums/galleries
- Popular with travelers
- Lots to see and do
- Exciting nightlife/entertainment
- Great for sightseeing
- Elegant restaurants
- Interesting historic areas
- Unique travel experience

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers
Maryland Image Weaknesses vs. Competitors

Base: Total Travelers

Difference in Percent Who Strongly Agree

-30 -20 -10 0

Different cultures/ways of life
Great shopping
Interesting place
An exciting place
Noted for its history
First-class hotels/resorts
Must see destination
Great live music
Great theme/amusement parks
Beautiful gardens and parks
Interesting historic sites
Interesting festivals/fairs/events

Note: Circed attributes are some of the most important image hot buttons for travelers
Maryland Image Strengths vs. New Jersey

Noted for the Star Spangled Banner: 37
Noted for Civil War History: 27
Unique local cuisine: 19
Warm, friendly people: 17
Noted for its history: 15
Interesting historic sites: 15
Noted for Harriett Tubman & the…: 14
Interesting historic areas: 14
Beautiful countryside: 14

Base: Total Travelers

Difference in Percent Who Strongly Agree
Maryland Image Strengths vs. New Jersey (Cont’d)

Difference in Percent Who Strongly Agree

- Safe anywhere: 14
- Good for hiking/backpacking: 13
- Great for bicycling: 12
- Excellent museums/galleries: 12
- Great for sightseeing: 11
- Truly unique scenery: 11
- Great camping/RV facilities: 10
- Good weather in the spring: 10
- Safe in tourist areas: 10
- Great conservation areas: 10

Base: Total Travelers
Maryland Image Weaknesses vs. New Jersey

Base: Total Travelers

Difference in Percent Who Strongly Agree

- Exciting gambling venues: -36
- Exciting nightlife/entertainment: -16
- Great theme/amusement parks: -16
- Great live music: -12
- Great for swimming/ water sports: -12
- Often notice advertising: -12
Maryland Image Strengths vs. New York

- Noted for the Star Spangled Banner: 36
- Noted for Civil War History: 24
- A good place to relax: 22
- Affordable accommodations: 19
- Affordable to eat there: 19
- Great for swimming/water sports: 17
- Warm, friendly people: 16
- Safe anywhere: 16

Base: Total Travelers

Difference in Percent Who Strongly Agree
Maryland Image Strengths vs. New York (Cont’d)

Great for golfers: 15
Great beaches: 15
Noted for Harriet Tubman & the Underground Railroad: 15
Great for boating/sailing: 14
Unique coastal/waterfront areas: 12
Great for bicycling: 11
Safe in tourist areas: 11
Great camping/RV facilities: 10
Good weather in the spring: 10
Safe in tourist areas: 10
Great conservation areas: 10

Base: Total Travelers
Maryland Image Weaknesses vs. New York

Base: Total Travelers

- Great shopping: -41
- Well-known destination: -40
- Popular with travelers: -38
- Elegant restaurants: -36
- Excellent museums/galleries: -35
- An exciting place: -35
- Well-known landmarks: -35

Note: Circled attributes are some of the most important image hot buttons for travelers
Maryland Image Weaknesses vs. New York (Cont’d)

Note: Circled attributes are some of the most important image hot buttons for travelers.
Maryland Image Weaknesses vs. New York (Cont’d)

Base: Total Travelers

- Must see destination: -26
- Often notice advertising: -26
- Great for professional sports: -25
- Good for an adult vacation: -24
- Interesting festivals/fairs/events: -22
- Great for walking/strolling: -22
- A fun place: -22
- A real adventure: -21

Note: Circled attributes are some of the most important image hot buttons for travelers.
Maryland Image Strengths vs. Pennsylvania

- Noted for the Star Spangled Banner: 24
- Unique local cuisine: 18
- Great for professional sports: 13
- Great for boating/sailing: 10
- Not too far away: 10

Base: Total Travelers
Maryland Image Weaknesses vs. Pennsylvania

Difference in Percent Who Strongly Agree

Well-known landmarks: -24
Interesting historic areas: -22
Noted for its history: -22
Great theme/amusement parks: -22
Great for skiing/snowboarding: -22
Excellent museums/galleries: -21
Interesting historic sites: -20
Great shopping: -19
Different cultures/ways of life: -18

Base: Total Travelers
Maryland Image Weaknesses vs. Pennsylvania (Cont’d)

Base: Total Travelers

- Noted for Civil War History
- Great for hunting
- Beautiful gardens and parks
- Noted for its architecture
- Great for sightseeing
- Well-known destination
- Interesting small towns/villages
- Great for professional sports
- Great for theatre and the performing arts

Note: Circled attributes are some of the most important image hot buttons for travelers
Maryland Image Strengths vs. Virginia

- Noted for the Star Spangled Banner: 24
- Unique local cuisine: 18
- Great for professional sports: 13
- Great for boating/sailing: 10
- Not too far away: 10

Base: Total Travelers

Difference in Percent Who Strongly Agree
Maryland Image Weaknesses vs. Virginia

Base: Total Travelers

- Great theme/amusement parks: -22
- Noted for its history: -18
- Interesting historic areas: -17
- Noted for Civil War History: -16
- Beautiful countryside: -14
- Noted for its architecture: -13
- Well-known landmarks: -13
- Great for sightseeing: -12

Difference in Percent Who Strongly Agree
Maryland Image Weaknesses vs. Virginia (Cont’d)

Interesting customs/traditions: -12
Truly beautiful scenery/setting: -12
Truly unique scenery: -12
Interesting historic sites: -11
Warm, friendly people: -11
Interesting small towns/villages: -11
Interesting festivals/fairs/events: -10
Lots to see and do: -10
Beautiful gardens and parks: -10

Base: Total Travelers

Note: Circled attributes are some of the most important image hot buttons for travelers.
Maryland Image Strengths vs. Washington, DC

Base: Total Travelers

- Great for boating/sailing: 33
- Great beaches: 32
- Great fishing: 30
- Unique coastal/waterfront areas: 29
- Good place for camping: 28
- Great for swimming/water sports: 27

Difference in Percent Who Strongly Agree
Maryland Image Strengths vs. Washington, DC (Cont’d)

Base: Total Travelers

- Beautiful countryside: 27%
- A good place to relax: 23%
- Good for hiking/backpacking: 23%
- Great camping/RV facilities: 21%
- Good for viewing wildlife/birds: 20%

Difference in Percent Who Strongly Agree
Maryland Image Weaknesses vs. Washington, DC

Base: Total Travelers

- Excellent museums/ galleries: -41
- Noted for its architecture: -40
- Well-known destination: -38
- Popular with travelers: -36
- Well-known landmarks: -36
- Great for sightseeing: -36
- Lots to see and do: -33
- Interesting place: -32
- Great for theatre and the performing arts: -30
- Interesting historic areas: -28

Note: Circled attributes are some of the most important image hot buttons for travelers
Maryland Image Weaknesses vs. Washington, DC (Cont’d)

Base: Total Travelers

Unique travel experience
-25

Must see destination
-24

Elegant restaurants
-24

First-class hotels/resorts
-22

An exciting place
-21

Great for walking/strolling
-20

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers
Maryland Image by Market
Maryland’s Overall Image by Market

“A Place I’d Really Enjoy Visiting”

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>City</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baltimore</td>
<td>58</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>53</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>50</td>
</tr>
<tr>
<td>New York</td>
<td>45</td>
</tr>
</tbody>
</table>

Base: Total Travelers
Maryland’s Overall Image by Market

“Excellent Value for the Money”

Base: Total Travelers

Percent Who Strongly Agree

Baltimore: 48
Washington, DC: 41
Philadelphia: 35
New York: 53
Maryland’s Overall Image Ratings by Market

Percent Who Strongly Agree

- **Exciting**
  - Baltimore: 49
  - Washington DC: 41
  - Philadelphia: 47
  - New York: 58

- **Family Atmosphere**
  - Baltimore: 58
  - Washington DC: 50
  - Philadelphia: 52
  - New York: 59

- **Adult Appeal**
  - Baltimore: 59
  - Washington DC: 52
  - Philadelphia: 52
  - New York: 53

- **Popular**
  - Baltimore: 47
  - Washington DC: 36
  - Philadelphia: 44
  - New York: 39
Maryland’s Overall Image Ratings by Market

Percent Who Strongly Agree

- **Luxurious**
  - Baltimore: 38
  - Washington DC: 39
  - Philadelphia: 42
  - New York: 44

- **Sightseeing**
  - Baltimore: 40
  - Washington DC: 45
  - Philadelphia: 45
  - New York: 59

- **Unique**
  - Baltimore: 38
  - Washington DC: 39
  - Philadelphia: 44
  - New York: 57

- **Worry Free**
  - Baltimore: 45
  - Washington DC: 47
  - Philadelphia: 48
  - New York: 55
Maryland’s Overall Image Ratings by Market

Percent Who Strongly Agree

- Entertainment: Baltimore (46), Washington DC (40), Philadelphia (25), New York (30)
- Climate: Baltimore (55), Washington DC (37), Philadelphia (43), New York (43)
- Affordability: Baltimore (62), Washington DC (53), Philadelphia (54), New York (54)
- Sports & Recreation: Baltimore (49), Washington DC (49), Philadelphia (43), New York (46)
Maryland’s Product Delivery
Maryland’s Product vs. Image

- Exciting: 45% Recent Visitors, 42% Never Visited
- Family Atmosphere: 55% Recent Visitors, 49% Never Visited
- Adult Appeal: 56% Recent Visitors, 49% Never Visited
- Popular: 50% Recent Visitors, 43% Never Visited
- Luxurious: 49% Recent Visitors, 43% Never Visited
- Sightseeing: 49% Recent Visitors, 42% Never Visited
- Unique: 46% Recent Visitors, 41% Never Visited
- Worry Free: 52% Recent Visitors, 50% Never Visited
- Entertainment: 50% Recent Visitors, 37% Never Visited
- Climate: 49% Recent Visitors, 35% Never Visited
- Affordability: 51% Recent Visitors, 43% Never Visited
- Sports & Recreation: 61% Recent Visitors, 46% Never Visited

* Visited in the past 2 years
Top Product Strengths vs. Image

Great for boating/sailing
Noted for the Star Spangled Banner
Unique coastal/waterfront areas
Not too far away
Good weather in the fall
Easy to get to
Affordable to get to
Interesting small towns/villages
Truly beautiful scenery/setting
Affordable to eat there
Lots to see and do

* Circled attributes are some of the most important image hot buttons for travelers
Top Product Strengths vs. Image

Base: Total Travelers

- Great theme/amusement parks: -8
- Great for golfers: -7
- Safe anywhere: -6

Difference in Percent Who Strongly Agree
Maryland Cities/Towns and Attractions Awareness and Visitation
Cities/Towns Ever Heard Of/ Visited

<table>
<thead>
<tr>
<th>Location</th>
<th>Aware %</th>
<th>Visit %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baltimore</td>
<td>80%</td>
<td>55%</td>
</tr>
<tr>
<td>Annapolis</td>
<td>55%</td>
<td>55%</td>
</tr>
<tr>
<td>Ocean City</td>
<td>46%</td>
<td>52%</td>
</tr>
<tr>
<td>Bethesda/Chevy Chase</td>
<td>45%</td>
<td>64%</td>
</tr>
<tr>
<td>Frederick</td>
<td>33%</td>
<td>57%</td>
</tr>
<tr>
<td>Hagerstown</td>
<td>45%</td>
<td>46%</td>
</tr>
<tr>
<td>Eastern Shore</td>
<td>52%</td>
<td>45%</td>
</tr>
<tr>
<td>National Harbor</td>
<td>33%</td>
<td>64%</td>
</tr>
</tbody>
</table>

Avg. 52%
Cities/Towns Ever Heard Of/ Visited (Cont’d)

<table>
<thead>
<tr>
<th>Town</th>
<th>Aware</th>
<th>Visited</th>
<th>Aware/Visit Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Havre de Grace</td>
<td>14</td>
<td>38</td>
<td>37%</td>
</tr>
<tr>
<td>Ellicott City</td>
<td>18</td>
<td>31</td>
<td>59%</td>
</tr>
<tr>
<td>Cumberland</td>
<td>13</td>
<td>31</td>
<td>40%</td>
</tr>
<tr>
<td>Cambridge</td>
<td>13</td>
<td>29</td>
<td>46%</td>
</tr>
<tr>
<td>Easton</td>
<td>13</td>
<td>27</td>
<td>48%</td>
</tr>
<tr>
<td>St. Michael's</td>
<td>14</td>
<td>26</td>
<td>52%</td>
</tr>
<tr>
<td>Deep Creek Lake</td>
<td>12</td>
<td>23</td>
<td>52%</td>
</tr>
<tr>
<td>Solomons</td>
<td>9</td>
<td>21</td>
<td>44%</td>
</tr>
<tr>
<td>Berlin</td>
<td>8</td>
<td>18</td>
<td>44%</td>
</tr>
</tbody>
</table>

Avg. 52%
Attractions Ever Heard Of/Visited

- Chesapeake Bay: 68% Aware, 38% Visited
- Baltimore Inner Harbor: 79% Aware, 63% Visited
- U.S. Naval Academy at Annapolis: 38% Aware, 60% Visited
- National Aquarium in Baltimore: 68% Aware, 53% Visited
- Oriole Park at Camden Yards: 55% Aware, 48% Visited
- Ft. McHenry Nat'l Monument: 48% Aware, 33% Visited
- Pimlico Race Track: 40% Aware, 36% Visited
- B & O Railroad Museum: 52% Aware, 36% Visited
- Assateague Island Nat'l & State Park: 52% Aware, 35% Visited
- Antietam: 34% Aware, 29% Visited
- Goddard Space Flight Center: 24% Aware, 28% Visited
- C & O Canal Nat'l Historical Park: 34% Aware, 28% Visited

Aware/Visit Ratio

- Avg. 44%

Aware

- Aware
- Visited
- Percent

<table>
<thead>
<tr>
<th>Aware</th>
<th>Visited</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>56%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>79%</td>
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<tr>
<td>38%</td>
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<tr>
<td>68%</td>
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<tr>
<td>55%</td>
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<td>48%</td>
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<td>35%</td>
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<tr>
<td>24%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>34%</td>
<td></td>
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</tr>
</tbody>
</table>
Attractions Ever Heard Of/Visited

- Catoctin Mountain Park/Camp David: Aware 9, Visited 23, Aware/Visit Ratio 39%
- Deep Creek Lake: Aware 12, Visited 22, Aware/Visit Ratio 53%
- Historic St. Mary's City: Aware 9, Visited 20, Aware/Visit Ratio 43%
- Maryland Live!: Aware 7, Visited 20, Aware/Visit Ratio 37%
- Rocky Gap: Aware 8, Visited 16, Aware/Visit Ratio 52%
- Smith Island: Aware 4, Visited 14, Aware/Visit Ratio 48%
- Calvert Cliffs: Aware 5, Visited 13, Aware/Visit Ratio 27%
- Blackwater National Wildlife Refuge: Aware 5, Visited 13, Aware/Visit Ratio 39%
- Wisp Resort: Aware 4, Visited 13, Aware/Visit Ratio 35%
- Adventure Sports Center: Aware 4, Visited 10, Aware/Visit Ratio 32%
- Historic National Road: Aware 3, Visited 9, Aware/Visit Ratio 44%
- Canal Place in Cumberland: Aware 4, Visited 8, Aware/Visit Ratio 34%

Avg. Aware/Visit Ratio: 44%
Maryland Activity Interest
Interest in Activities

- Bay/ocean/harborside dining: 75%
- Local seafood restaurant: 73%
- Historic town: 63%
- Beach: 60%
- Historic monument/fort/home: 60%
- Local history museum: 55%
- Concert/performance: 54%
- Civil War battlefields/sites: 54%
- Art museums/galleries: 53%
- Zoo/nature park: 53%
- Boat ride/short cruise: 52%
- Public/botanical garden: 51%
- Local markets/produce: 51%
- National/State Scenic byway tour: 50%
- Underground Railroad attraction: 50%
Interest in Activities (Cont’d)

Percent “Would Really Enjoy”

- Star Spangled Banner attraction: 50%
- Maryland wine trail/wineries: 48%
- Professional sports game: 47%
- Historic lighthouse: 46%
- Other festival/fair: 46%
- Wildlife conservation area: 46%
- Amusement/theme park: 40%
- Film festival: 38%
- Sailing/boating: 37%
- Antiquing: 37%
- Gambling establishment: 35%
- Name-brand shopping: 32%
- Cycling around countryside: 32%
- College/amateur sports event: 28%
- Golf: 23%
- Fishing/hunting: 23%
Other Behavioral Information
Planning Cycle

- Less than 1 month: 20%
- 1-2 months: 38%
- 3-5 months: 25%
- 6-12 months: 15%
- More than 1 year: 2%
Information Sources Used for Planning

- Hotel websites: 37%
- Online booking engines: 36%
- Hotel/resort: 36%
- Airline websites: 29%
- Personal experience from past visit(s): 27%
- Airline/commercial carrier: 24%
- Other online sources: 24%
- Travel guide books: 20%
- Advice from relatives/friends: 20%
- Social networking sites: 16%
- Travel agent: 15%
- Car rental websites: 15%
- Other destination websites: 15%
- Travel articles in magazines: 14%
- Auto-club: 14%
- Television advertising: 10%
Information Sources Used for Planning (Cont’d)

- Television travel shows: 9%
- Company specializing in group tours: 9%
- Local visitors bureau/chamber of commerce: 9%
- Magazine advertising: 9%
- Toll-free number: 8%
- State tourism office: 8%
- Newspaper advertising: 7%
- Newspaper travel section: 7%
- Other books: 6%
- Other information from newspapers: 5%
- Other information from television: 4%
- Association/club: 4%
- Other information from magazines: 4%
- Radio travel shows: 3%
- Radio advertising: 3%
- Other information from radio: 3%