Longwoods INTERNATIONAL

Maryland

2013 Visitor Profile Report

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Introduction

- Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- In 2007, our proprietary Longwoods **Travel USA®** program was migrated from mail to online, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.
- It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- This report provides a profile of Maryland **domestic** visitors in 2013.

Research Objectives

- The visitor research program is designed to provide:
  - *a profile of Maryland' performance within its overnight and day travel market*
  - *estimates of domestic overnight and day visitor volumes to Maryland*
  - *Domestic visitor expenditures in Maryland*
  - *profiles of Maryland's overnight and day trips and travelers.*

Research Method

- Each quarter, a random cross-section of online sample is sent an e-mail invitation to participate in the survey. A reminder is e-mailed several days later to non-responders.

- For the 2013 travel year, this yielded :
  - 229,726 trips for analysis nationally:
    - 153,730 overnight trips
    - 75,996 day trips

- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

Research Method (Cont'd)

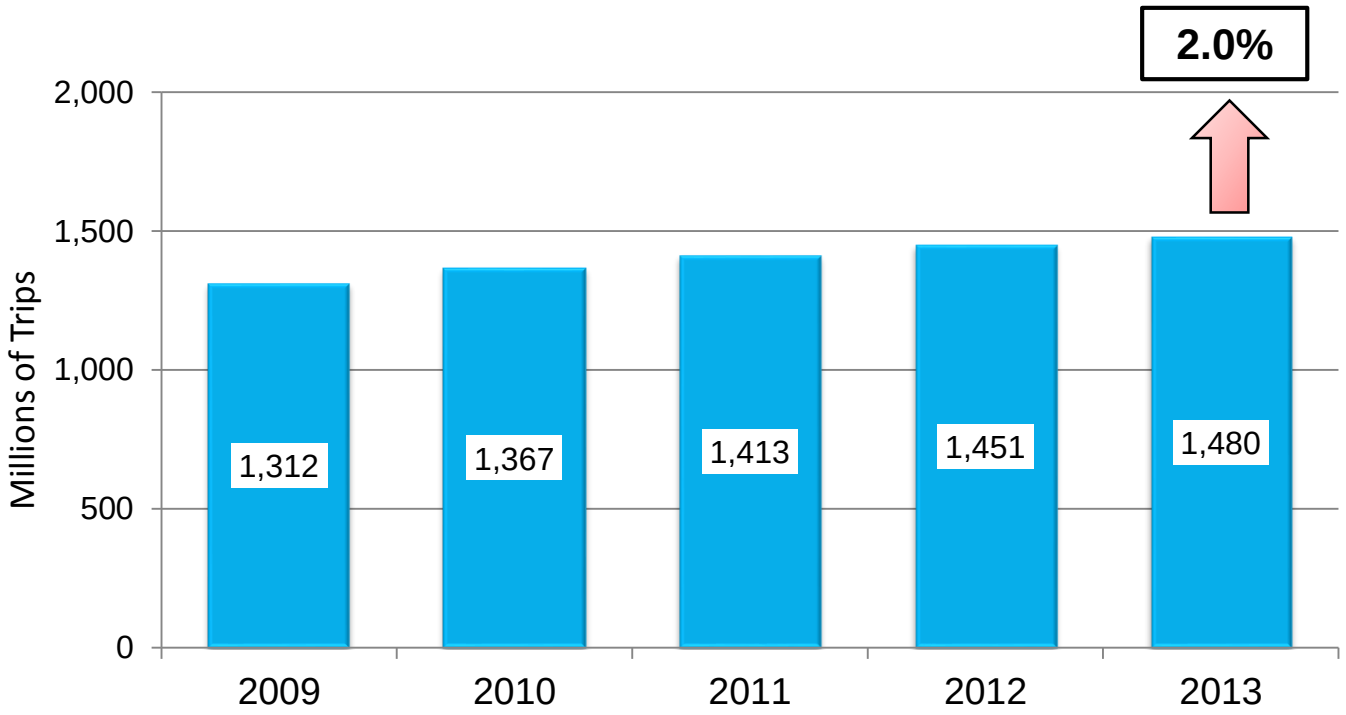
- **Maryland Overnight Visitor Research**
  - *The **Travel USA®** program identified 2,424 individuals who visited Maryland on an overnight trip in 2013.*

- **Maryland Day Visitor Research**
  - *The **Travel USA®** program identified 1,532 individuals who visited Maryland on a day trip in 2013.*

Size & Structure of the U.S. Travel Market

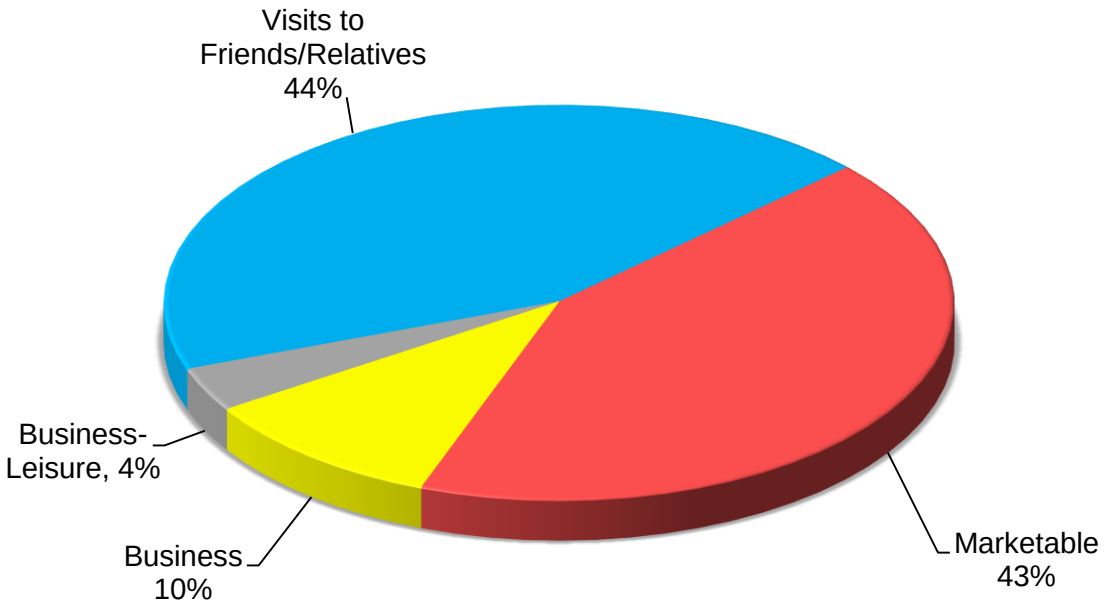
Total Size of the U.S. Travel Market — 2009-2013

Base: Total Overnight Trips



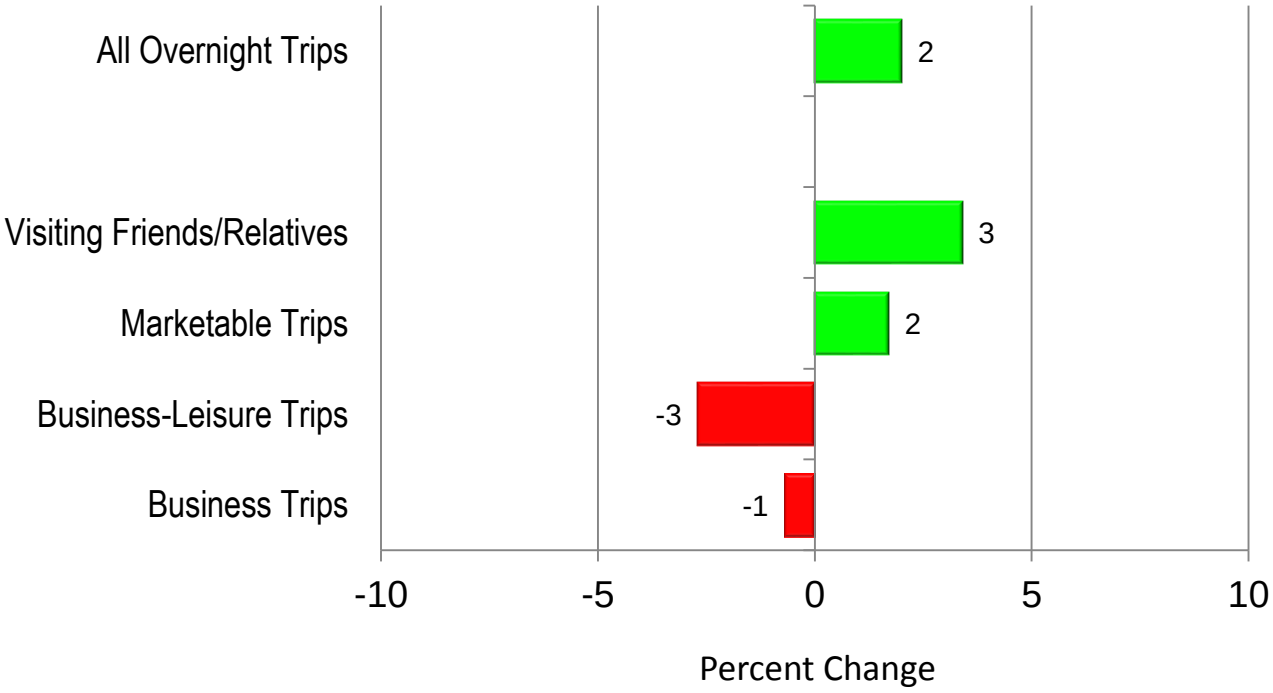
Structure of the U.S. Travel Market — 2013 Overnight Trips

Base: Adult Overnight Trips

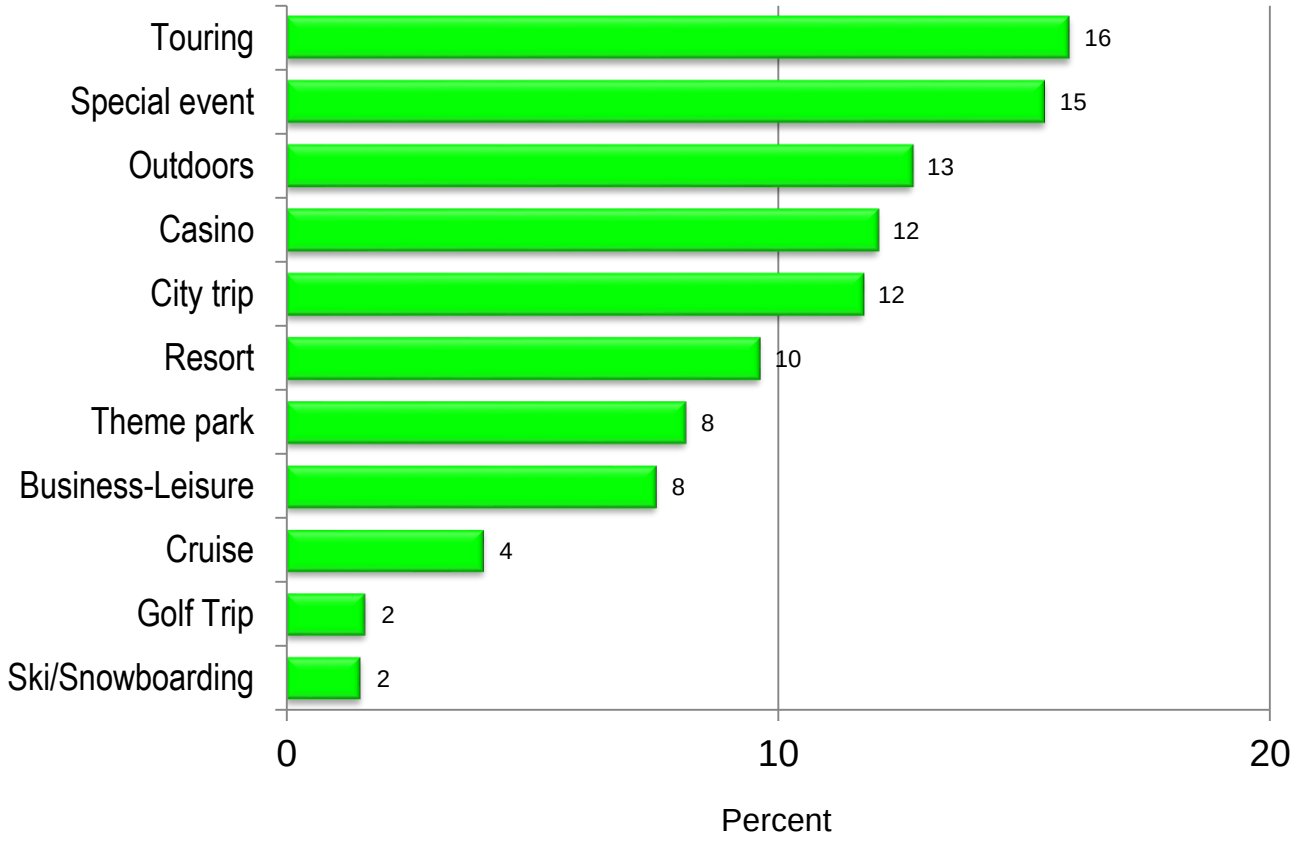


U.S. Market Trends for Overnight Trips — 2013 vs. 2012

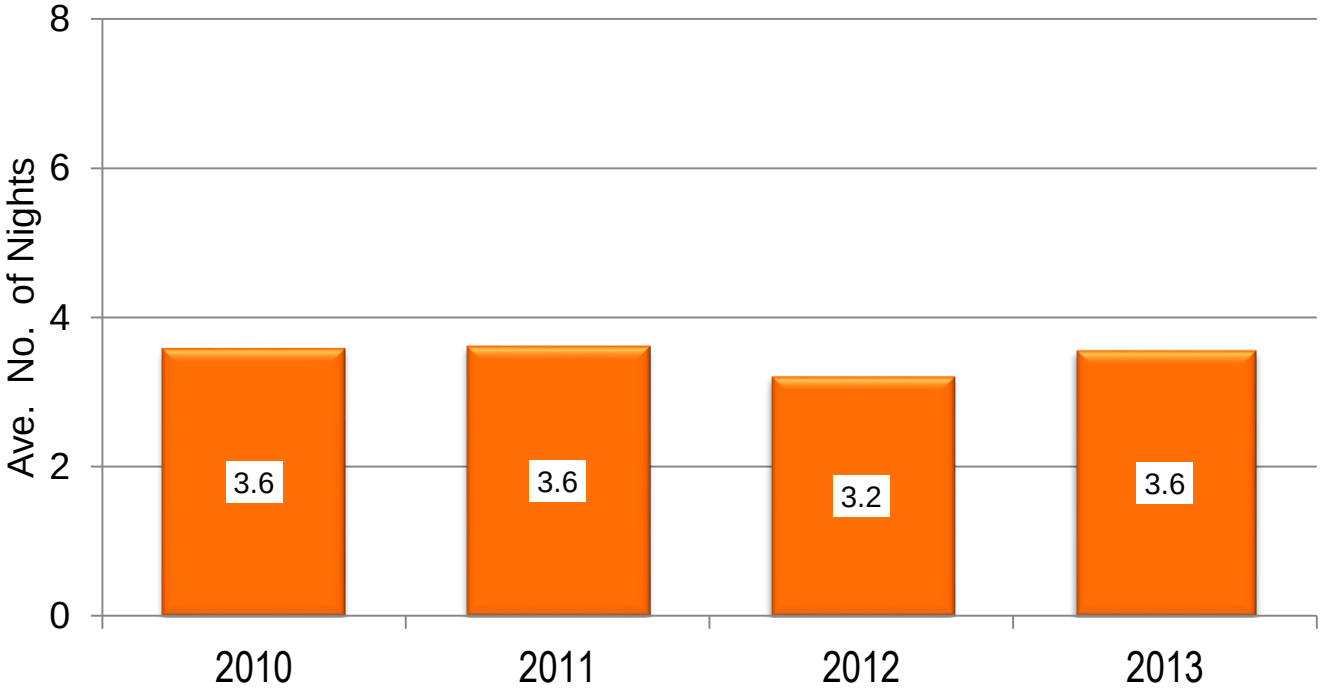
Base: Overnight Trips



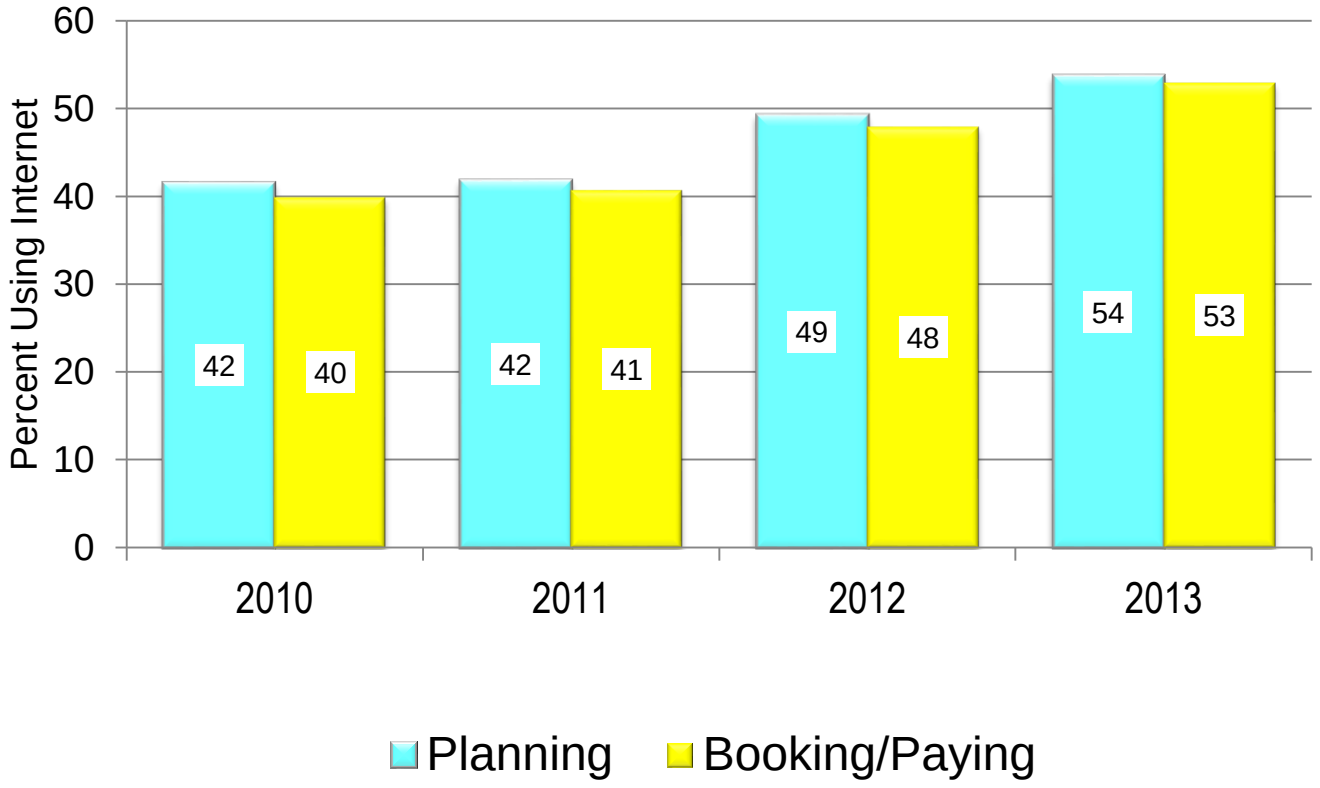
U.S. Overnight Marketable Trip Mix — 2013 Travel Year



Average Length of Overnight Trips



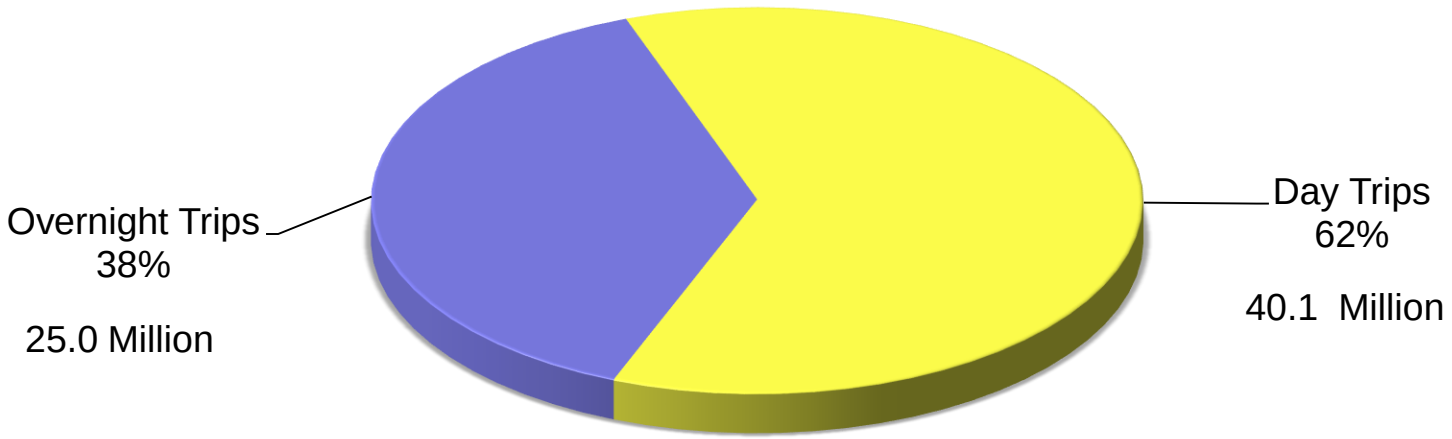
Internet Usage for Overnight Trip Planning and Booking/Paying



Size & Structure of Maryland Domestic Travel Market

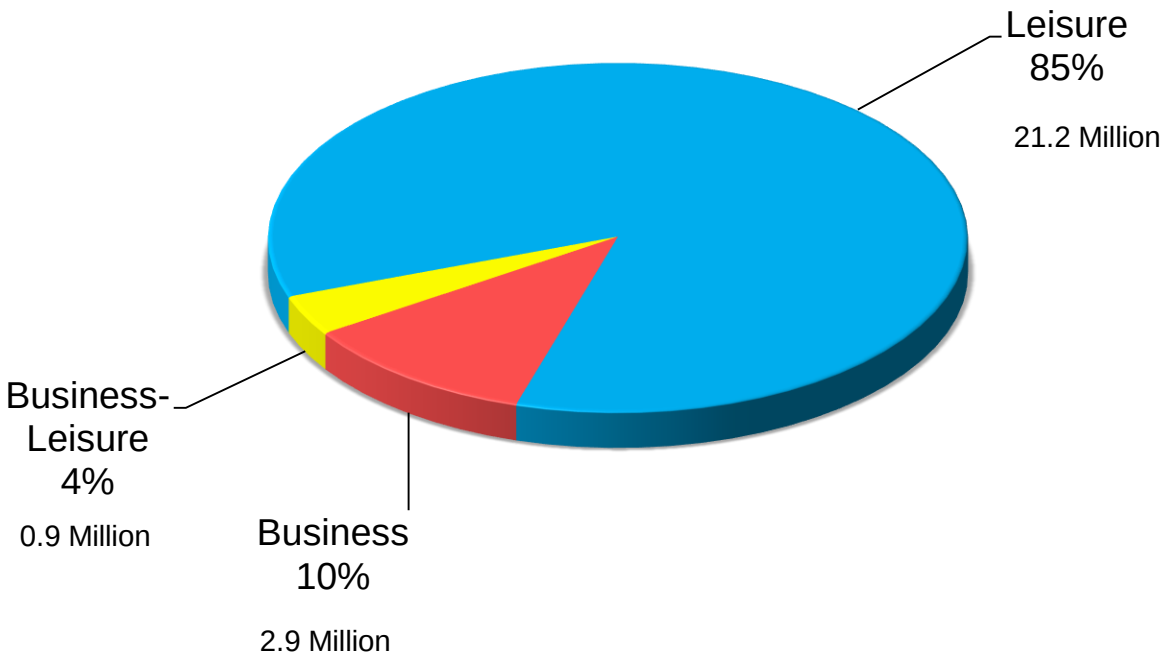
Total Size of Maryland Domestic Travel Market in 2013

Total Person-Trips = 65.1 Million



Size of Maryland's Overnight Travel Market — by Trip Purpose

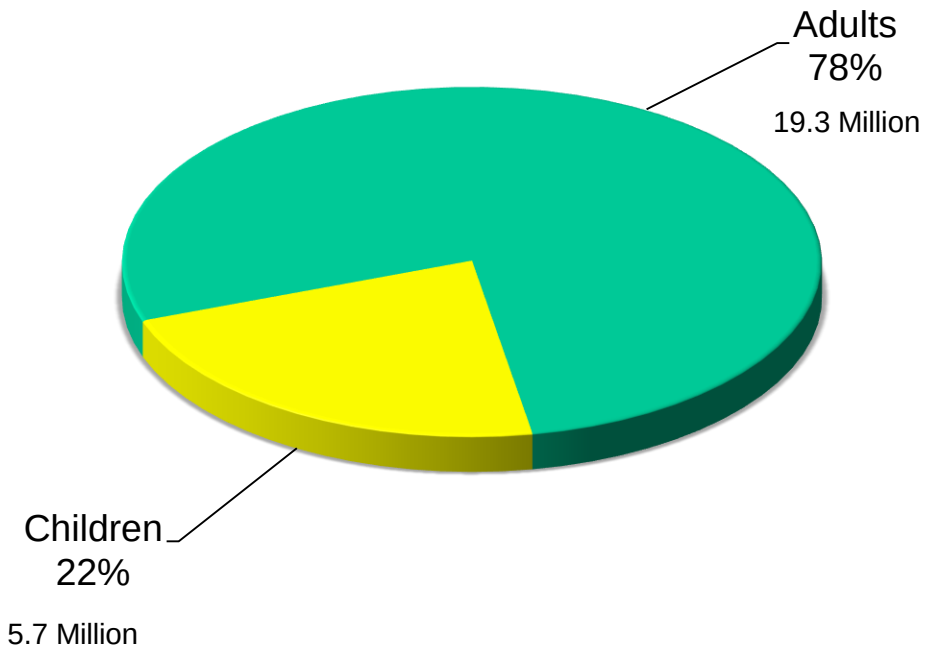
Total Person-Trips* = 25.0 Million



*Total volume includes both adults and children

Size of Maryland's Overnight Travel Market — Adults vs. Children

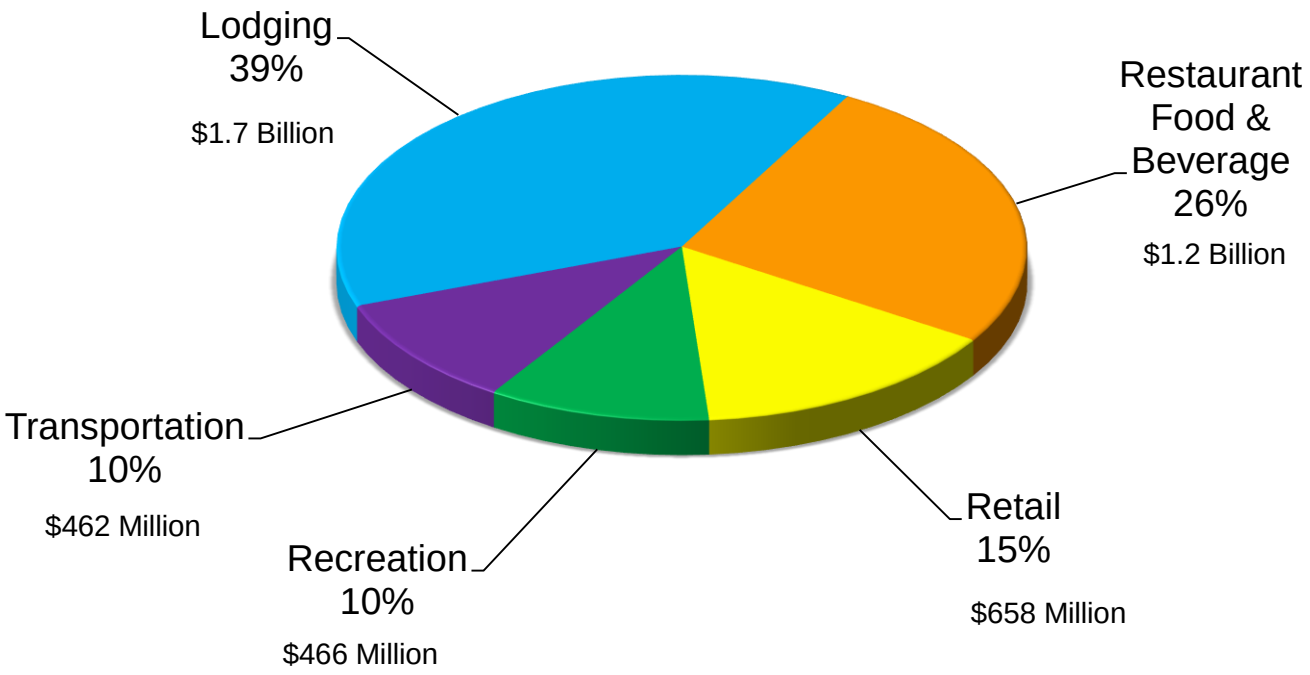
Total Person-Trips* = 25.0 Million



*Total volume includes both adults and children

Total Travel Spending by Sector: Overnight Trips

Total Spending = $4.5 Billion

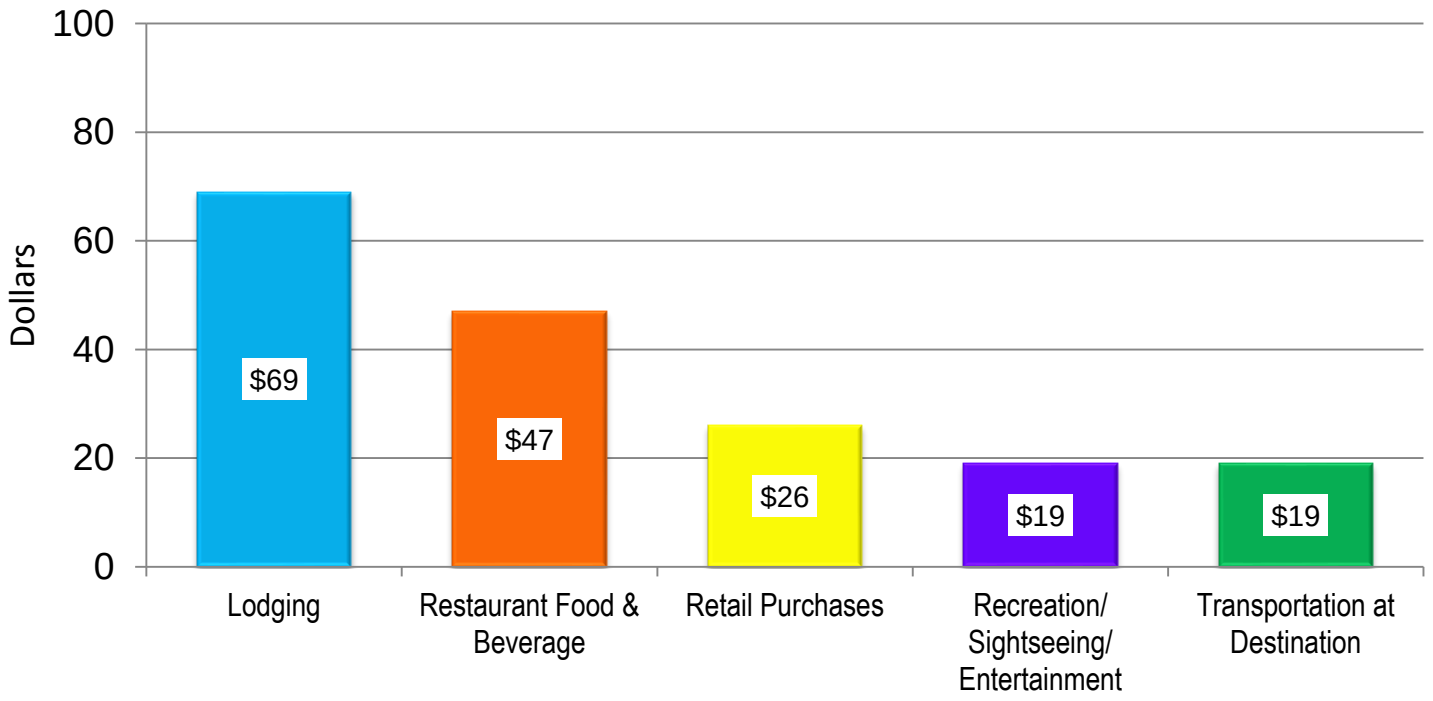


Overnight Trip Detail

Overnight Expenditures

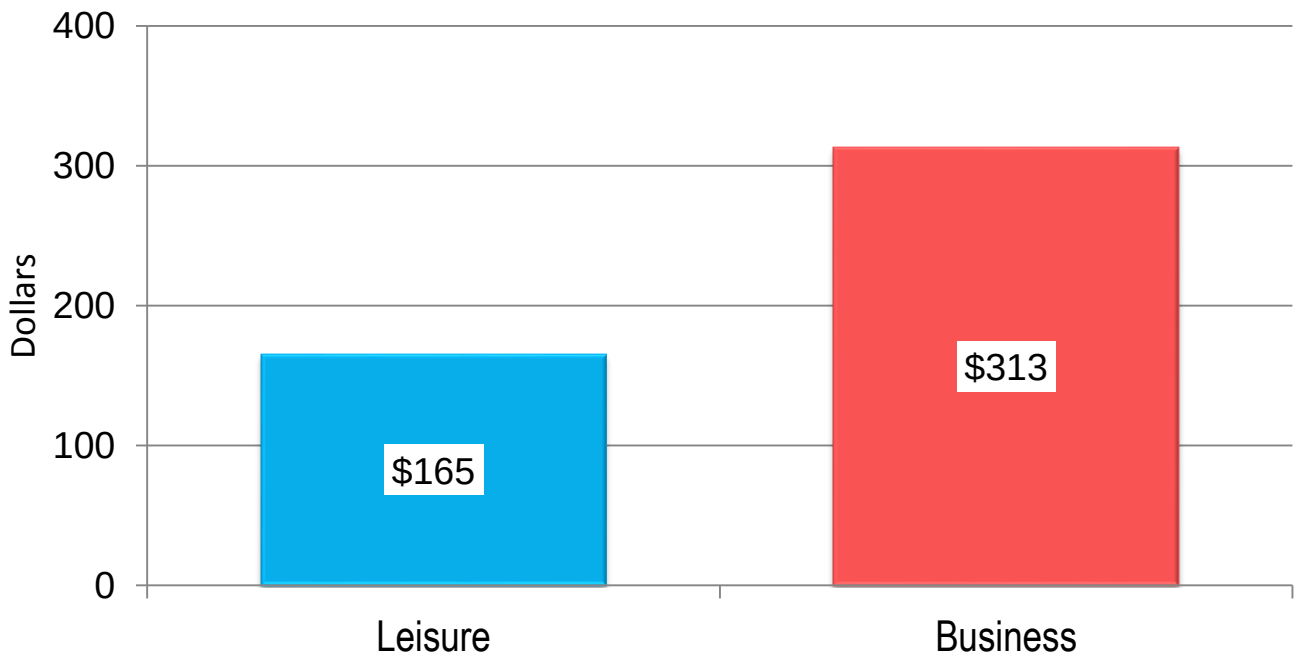
Average Per Person Expenditures on Domestic Overnight Trips — By Sector

Base: Total Overnight Person-Trips to Maryland



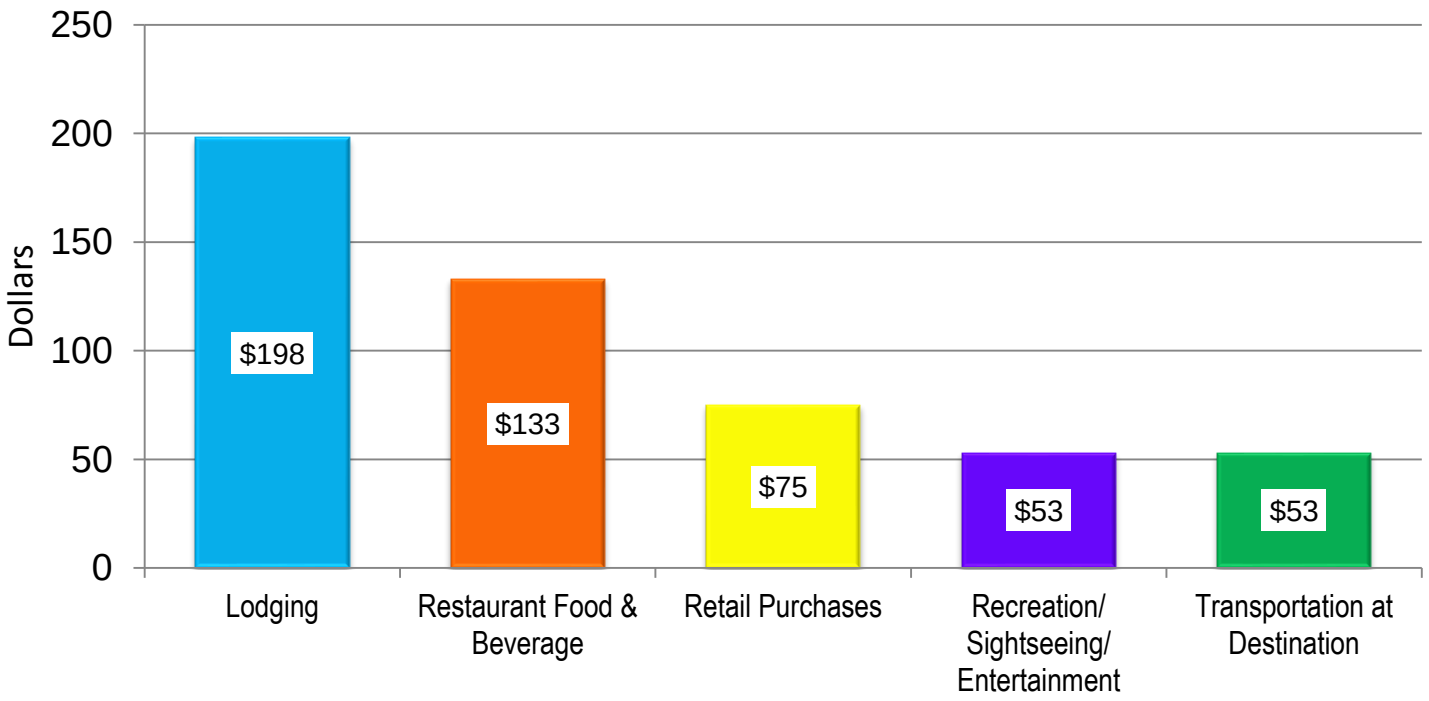
Average Per Person Expenditures on Domestic Overnight — by Trip Purpose

Base: Total Overnight Person-Trips to Maryland



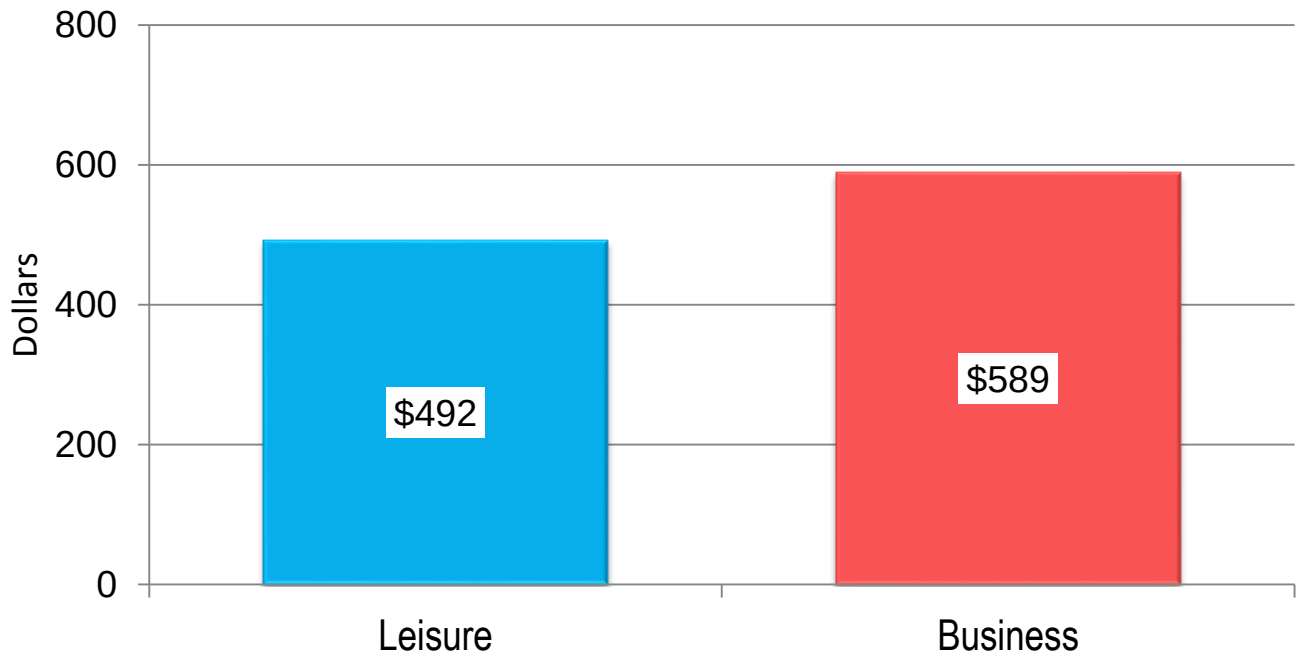
Average Per Party Expenditures on Domestic Overnight Trips — By Sector

Base: Total Overnight Person-Trips to Maryland



Average Per Party Expenditures on Domestic Overnight — by Trip Purpose

Base: Total Overnight Person-Trips to Maryland

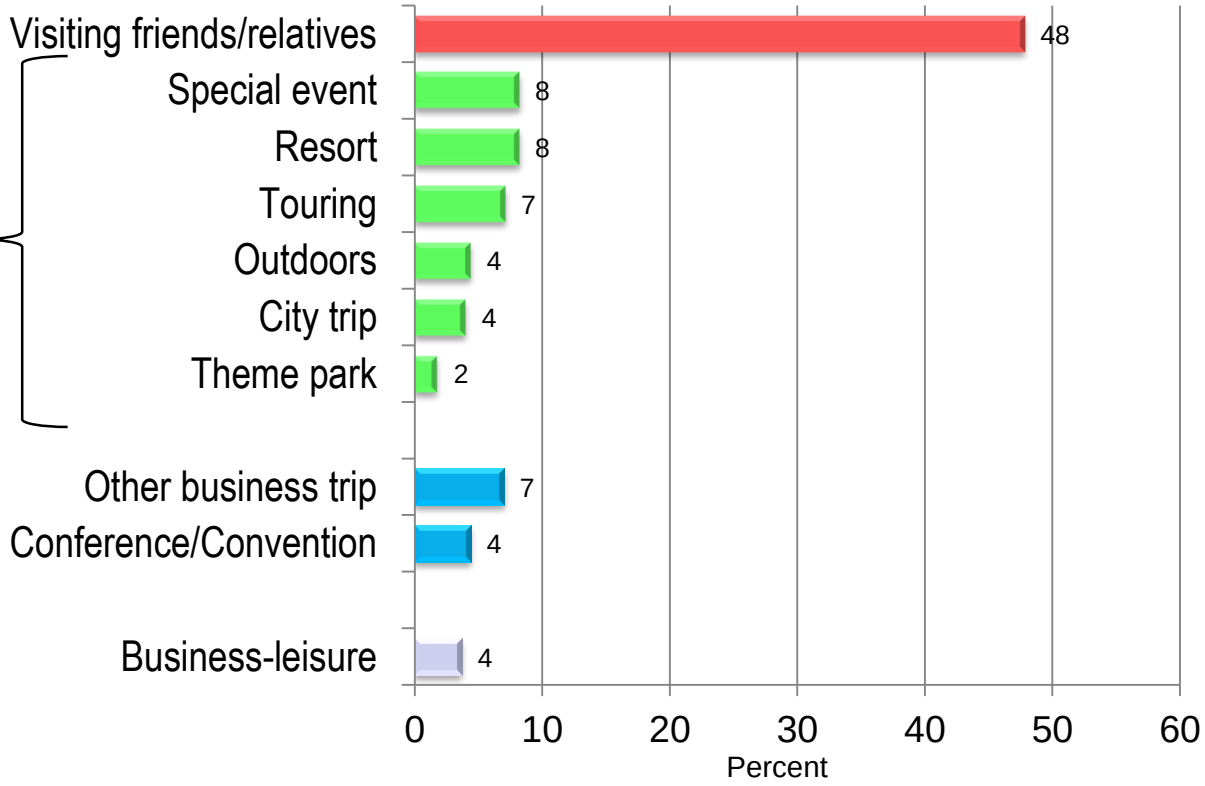


Overnight Trip Characteristics

Main Purpose of Trip

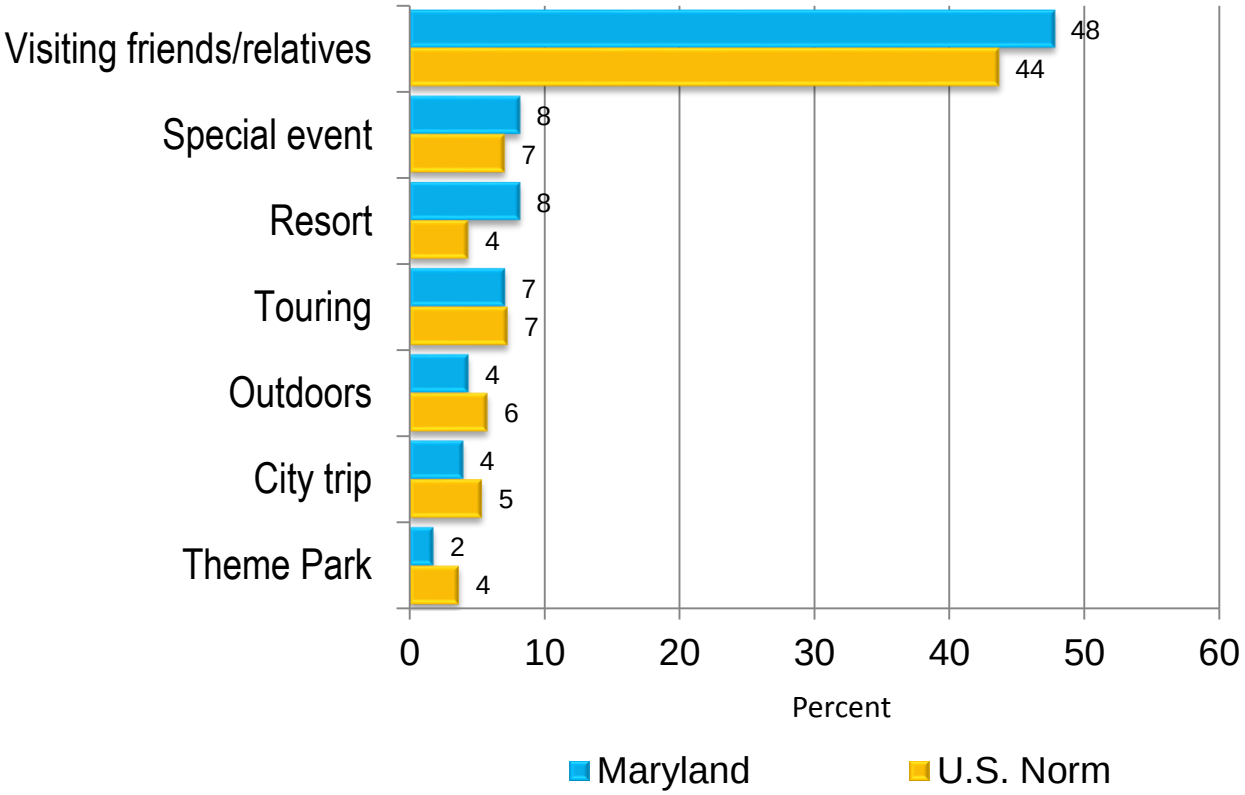
Base: Overnight Person-Trips to Maryland

Marketable Trips 37%



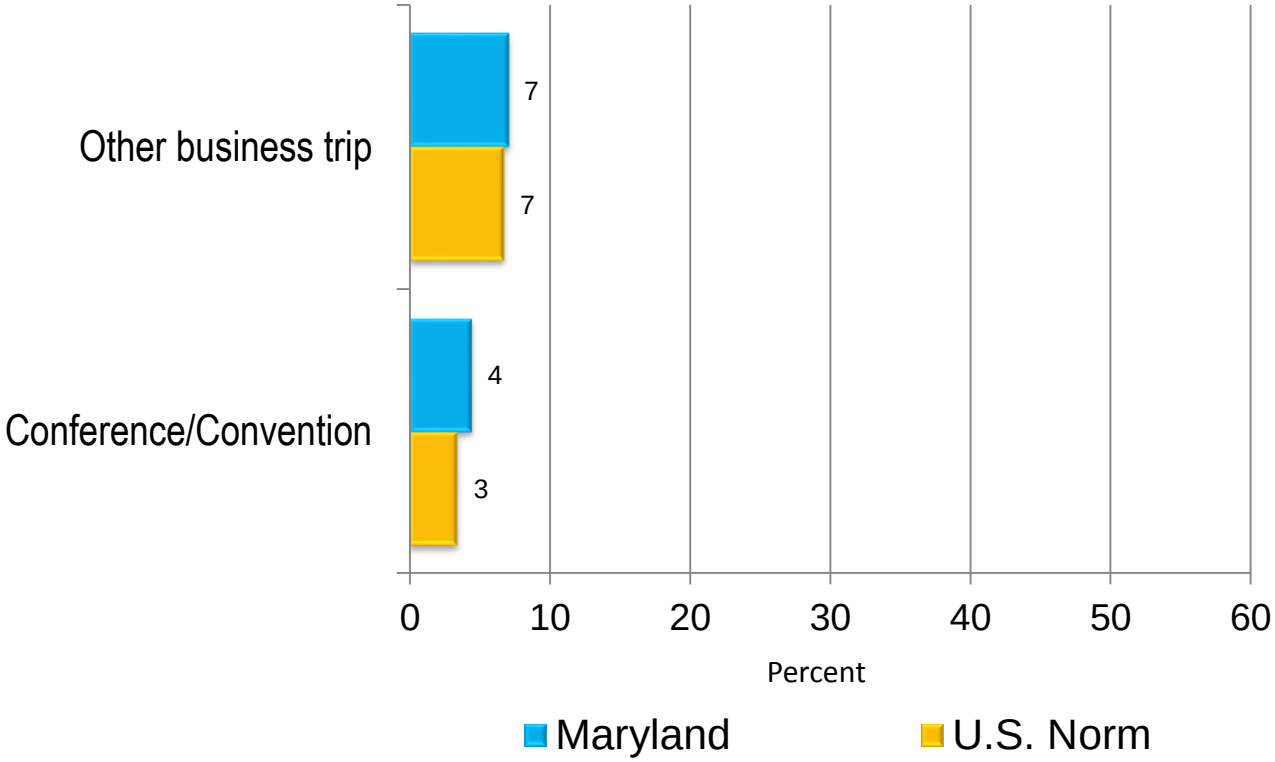
Main Purpose of Leisure Trip — Maryland vs. National Norm

Base: Overnight Person-Trips



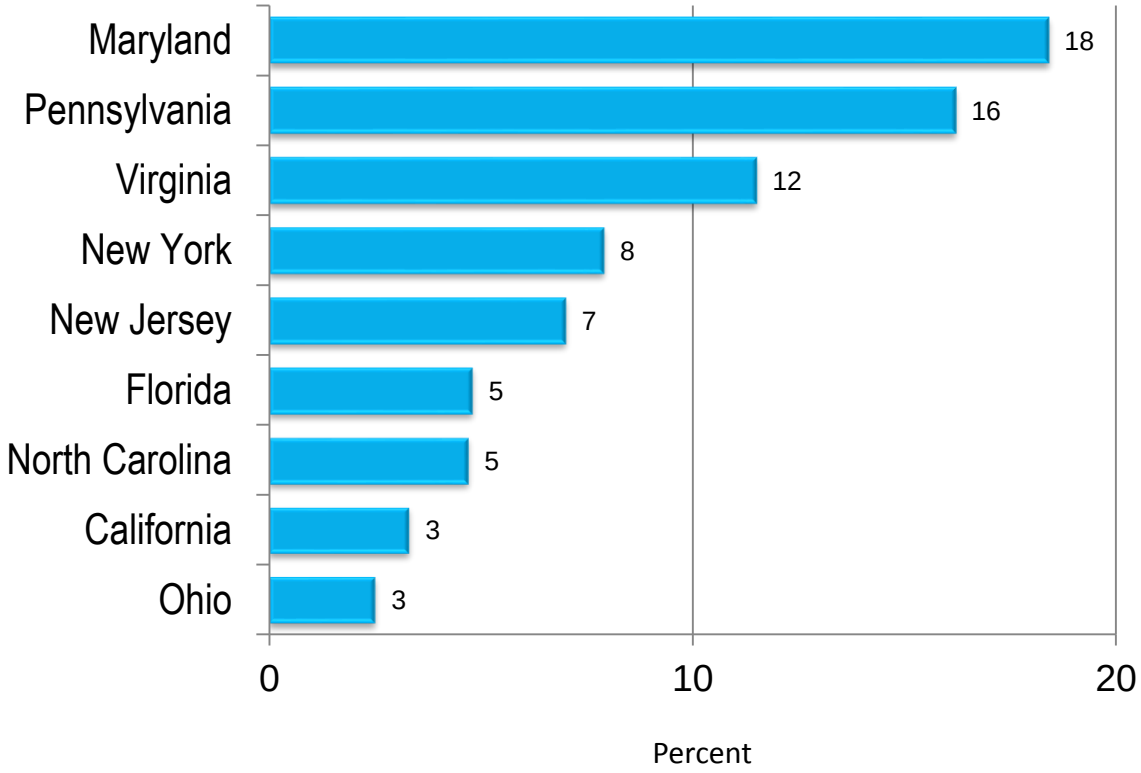
Main Purpose of Business Trip — Maryland vs. National Norm

Base: Overnight Person-Trips



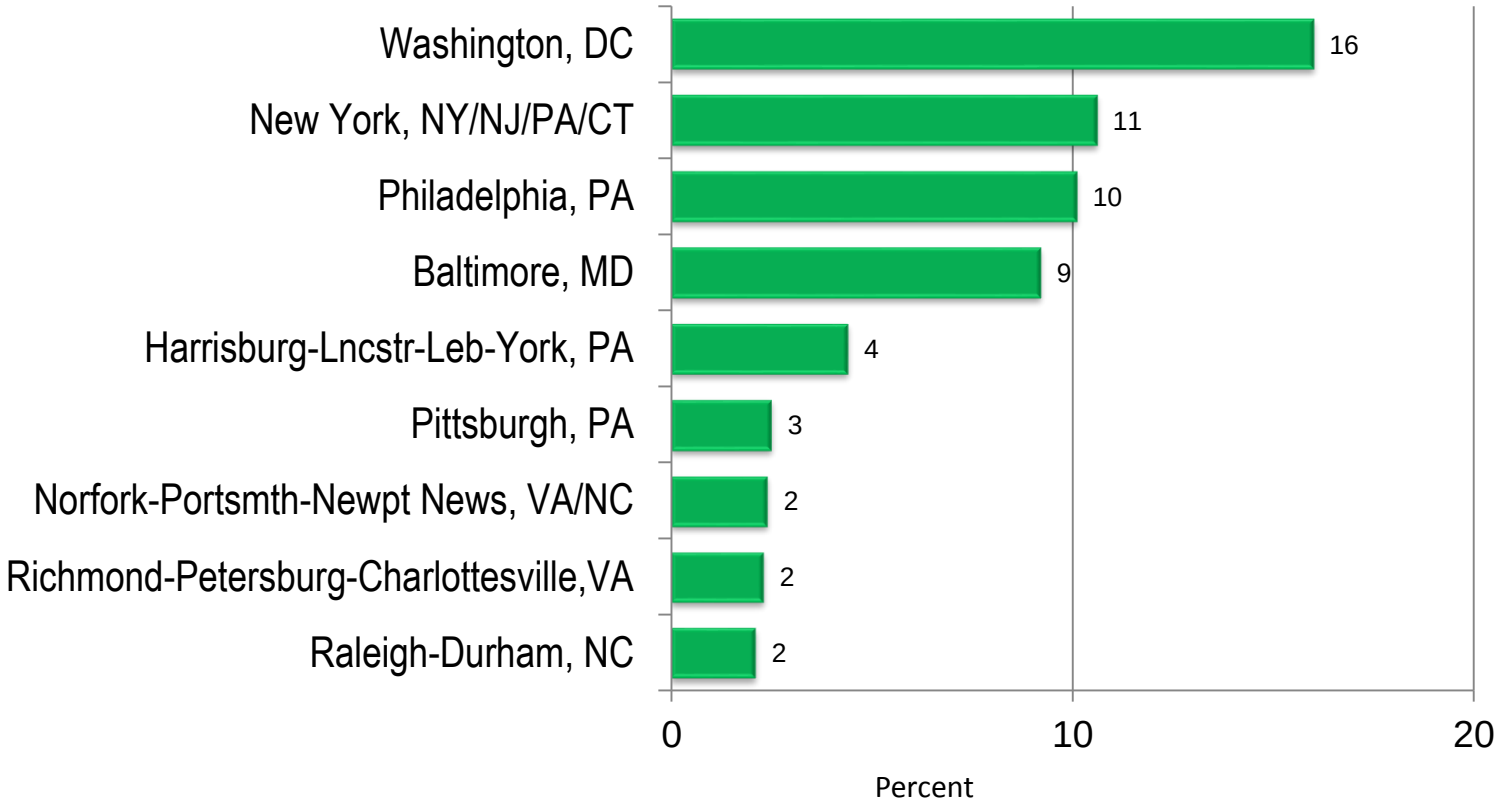
State Origin Of Trip

Base: Overnight Person-Trips to Maryland



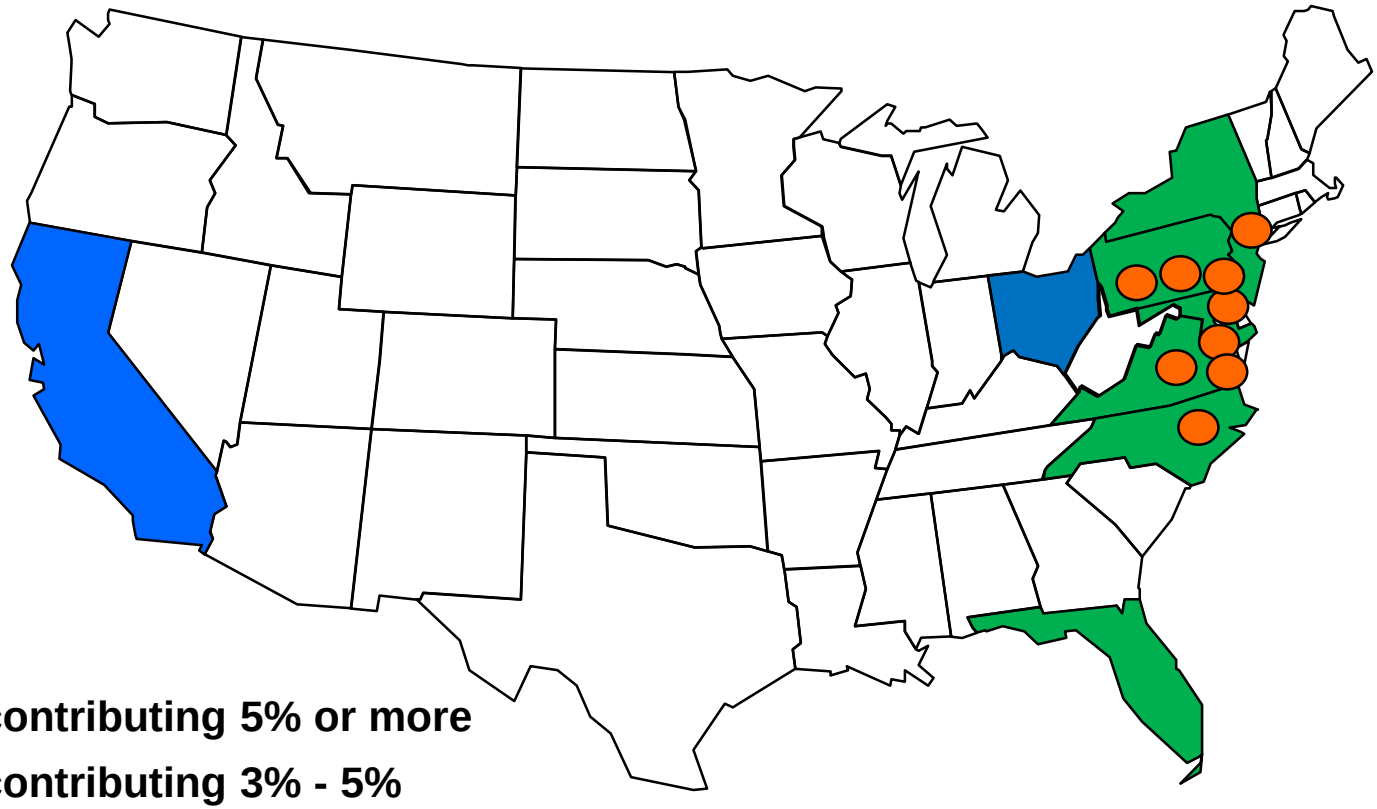
DMA Origin Of Trip

Base: Overnight Person-Trips to Maryland



Sources of Business

Base: Overnight Person-Trips to Maryland



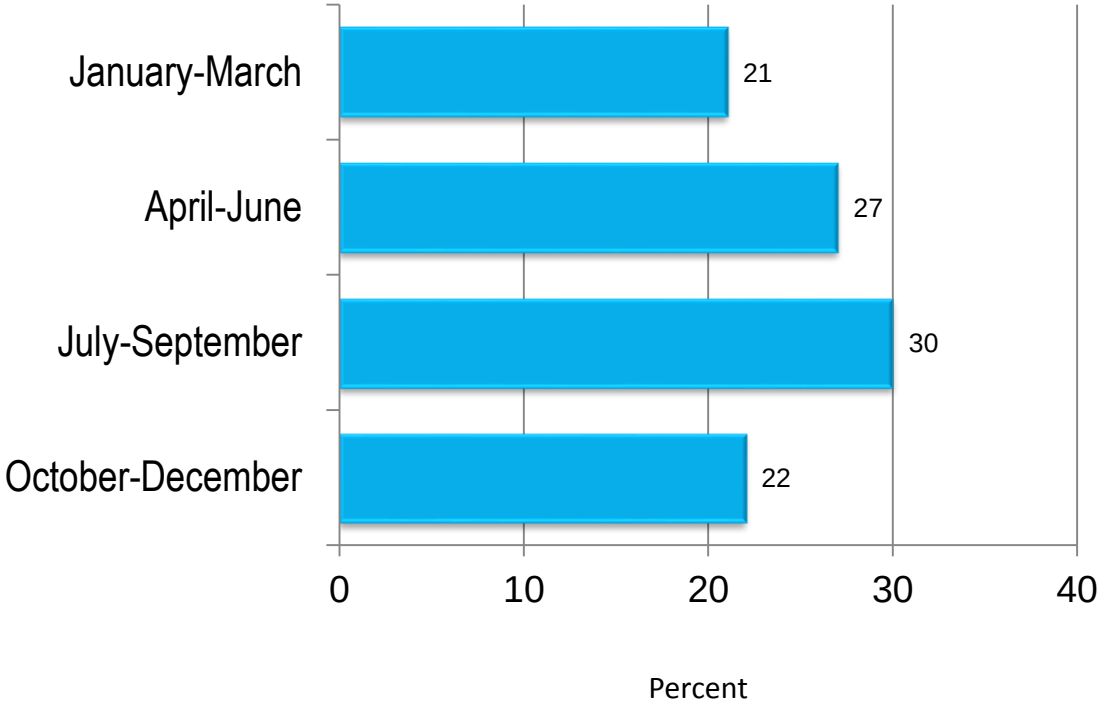
States contributing 5% or more

States contributing 3% - 5%

DMA's contributing more than 2%

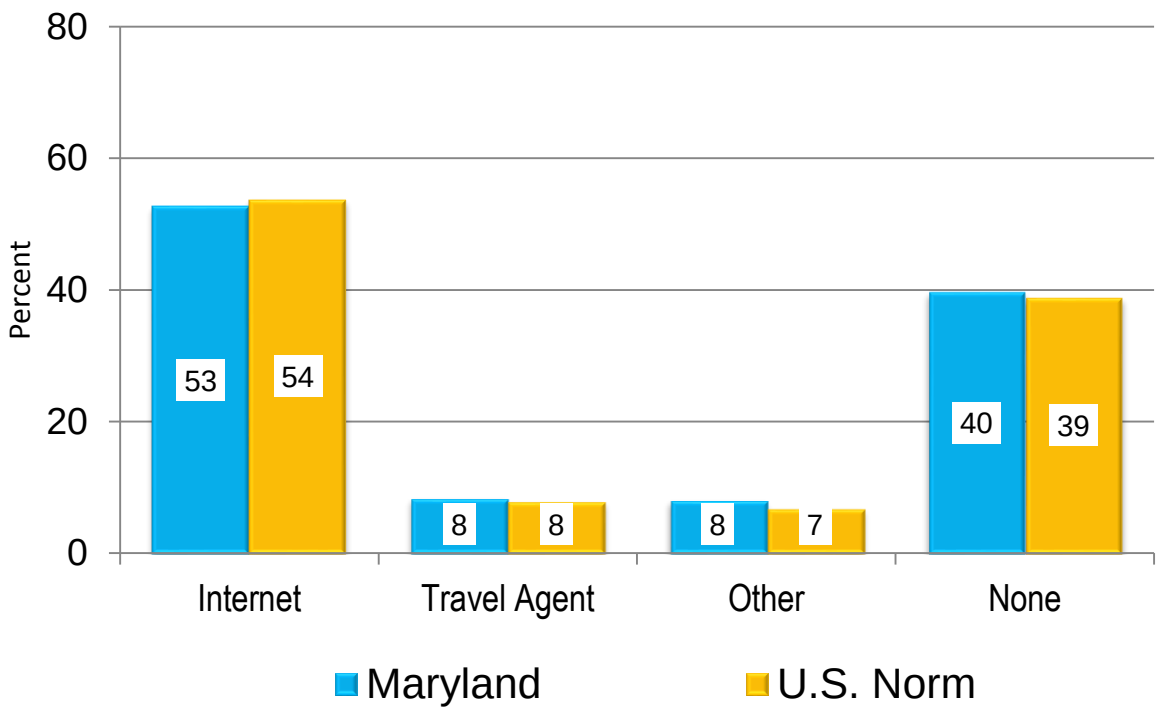
Season of Trip

Base: Overnight Person-Trips to Maryland



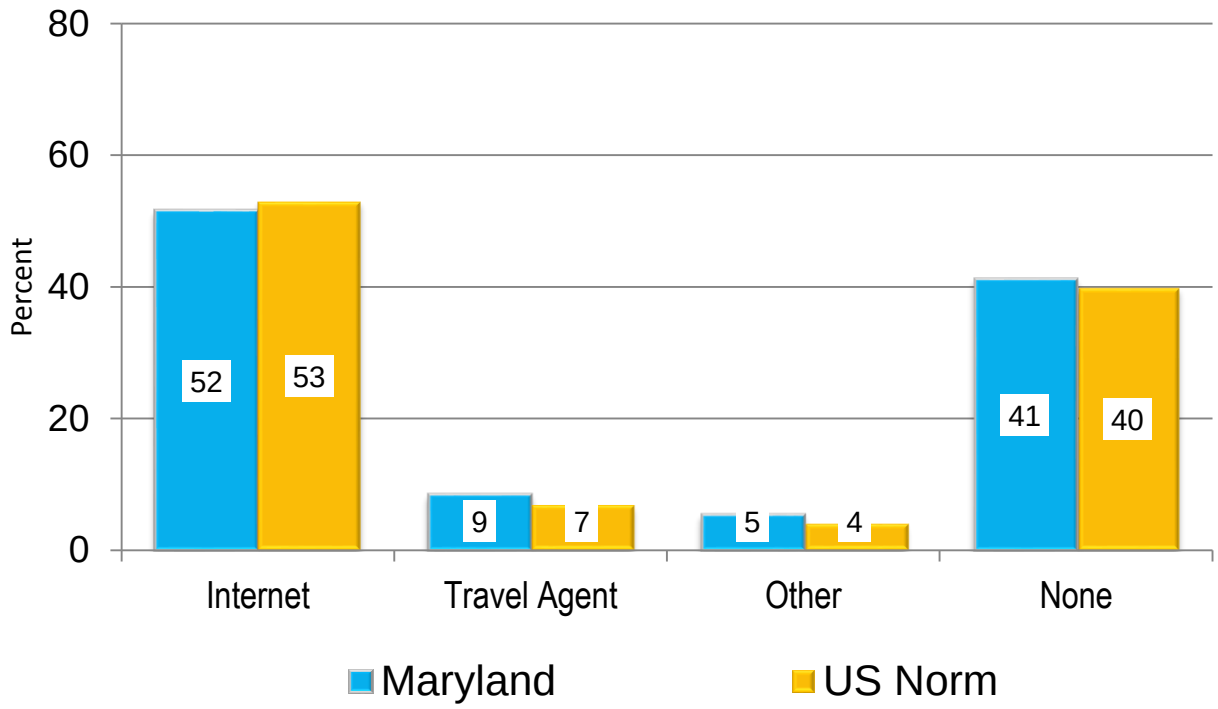
Method of Planning Trip

Base: Overnight Person-Trips



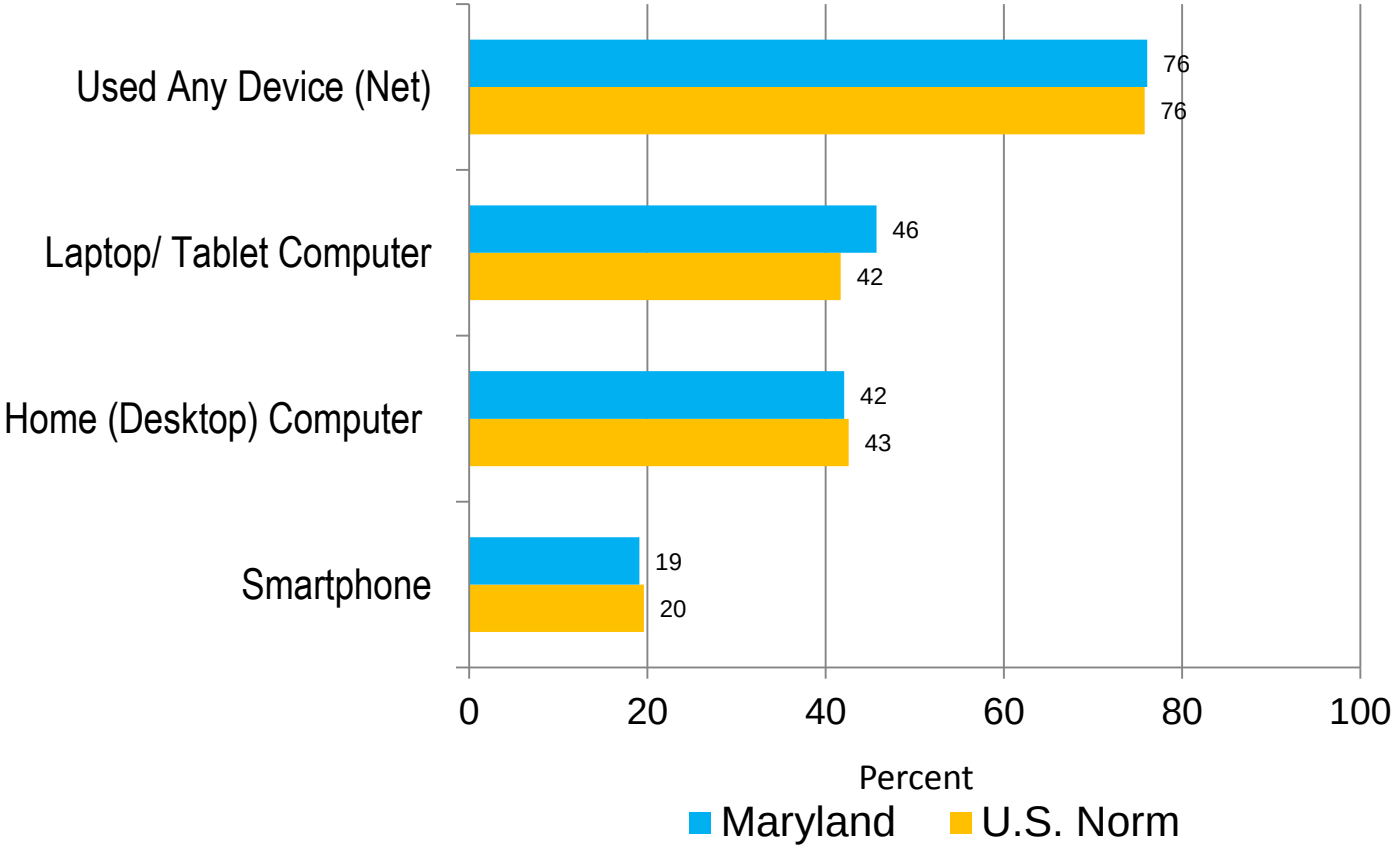
Method of Booking Trip

Base: Overnight Person-Trips



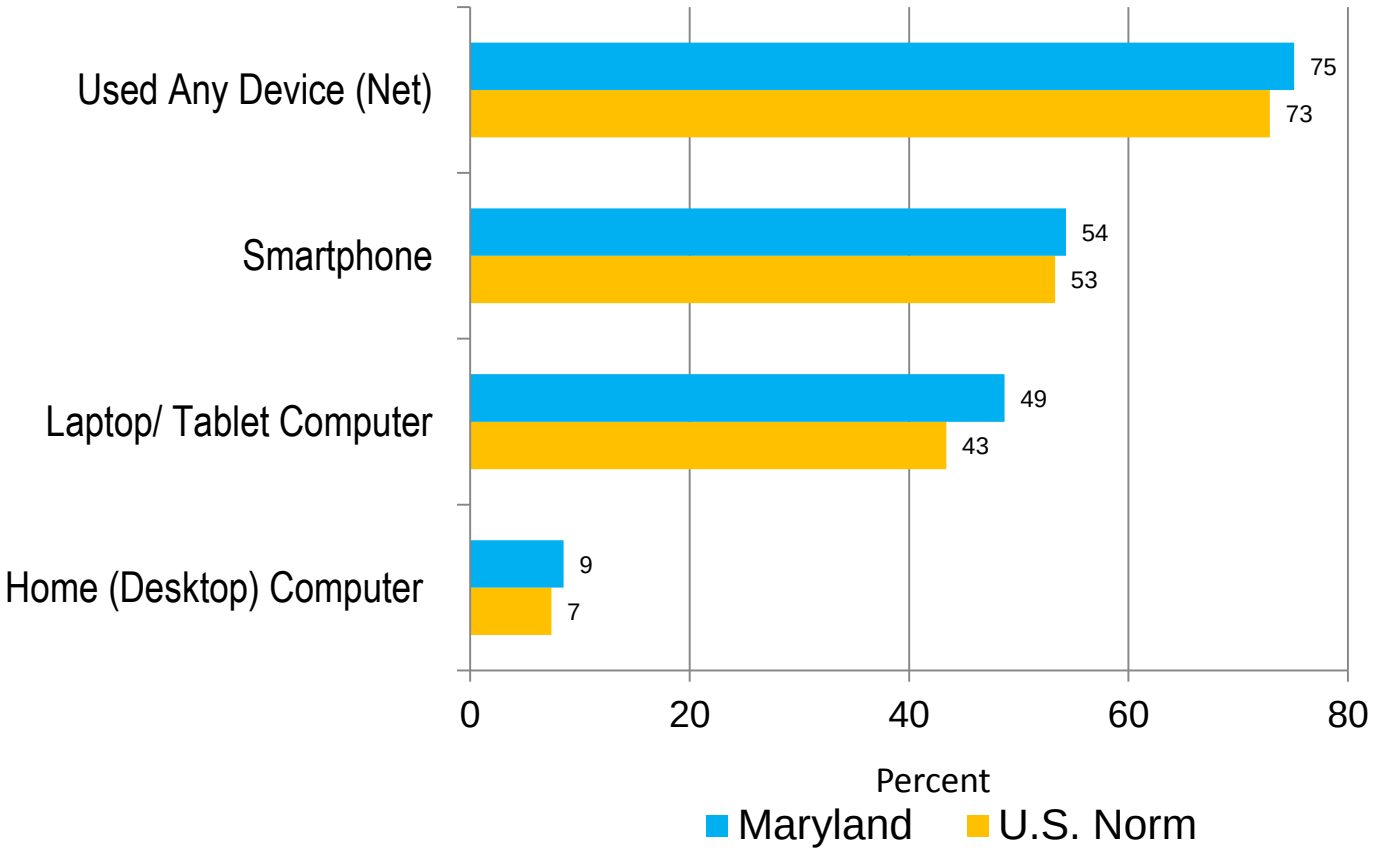
Use of Devices for Trip Planning

Base: Adult Overnight Leisure Trips



Use of Devices During Trip

Base: Adult Overnight Leisure Trips

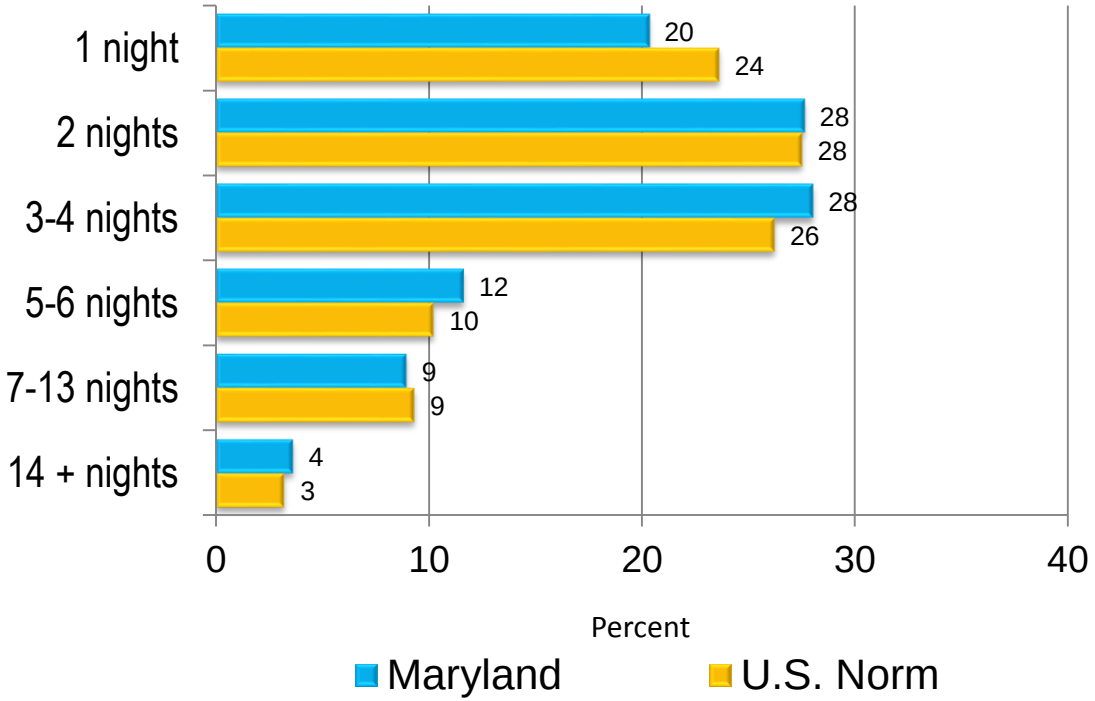


Total Nights Away on Trip

Base: Overnight Person-Trips

Average Maryland = 3.8 Nights

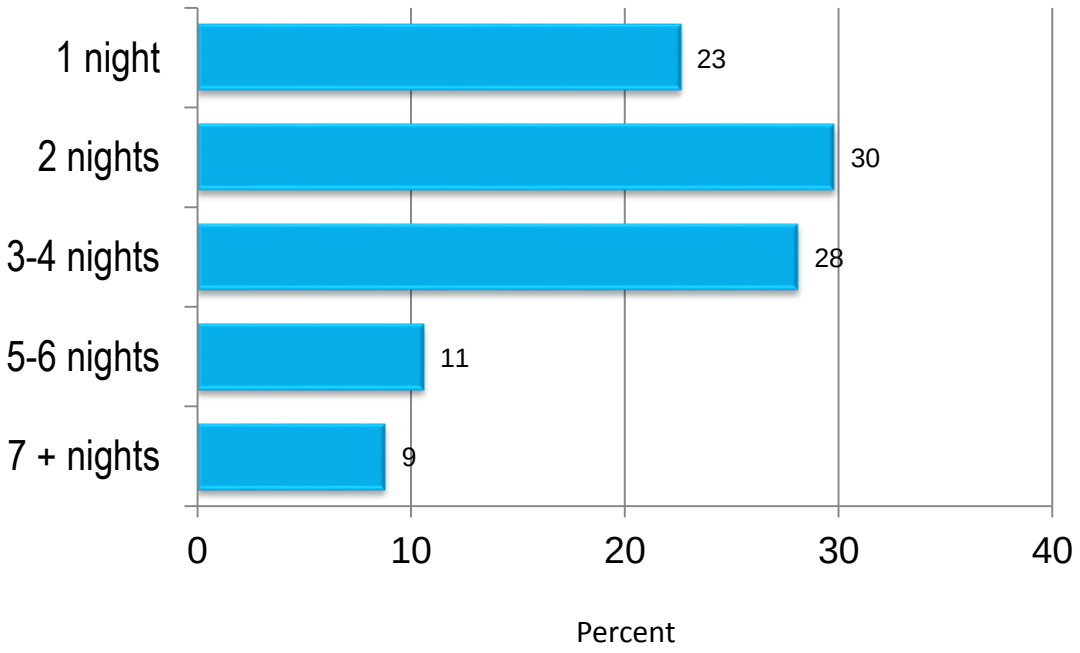
Average US Norm = 3.6 Nights



Number of Nights Spent in Maryland

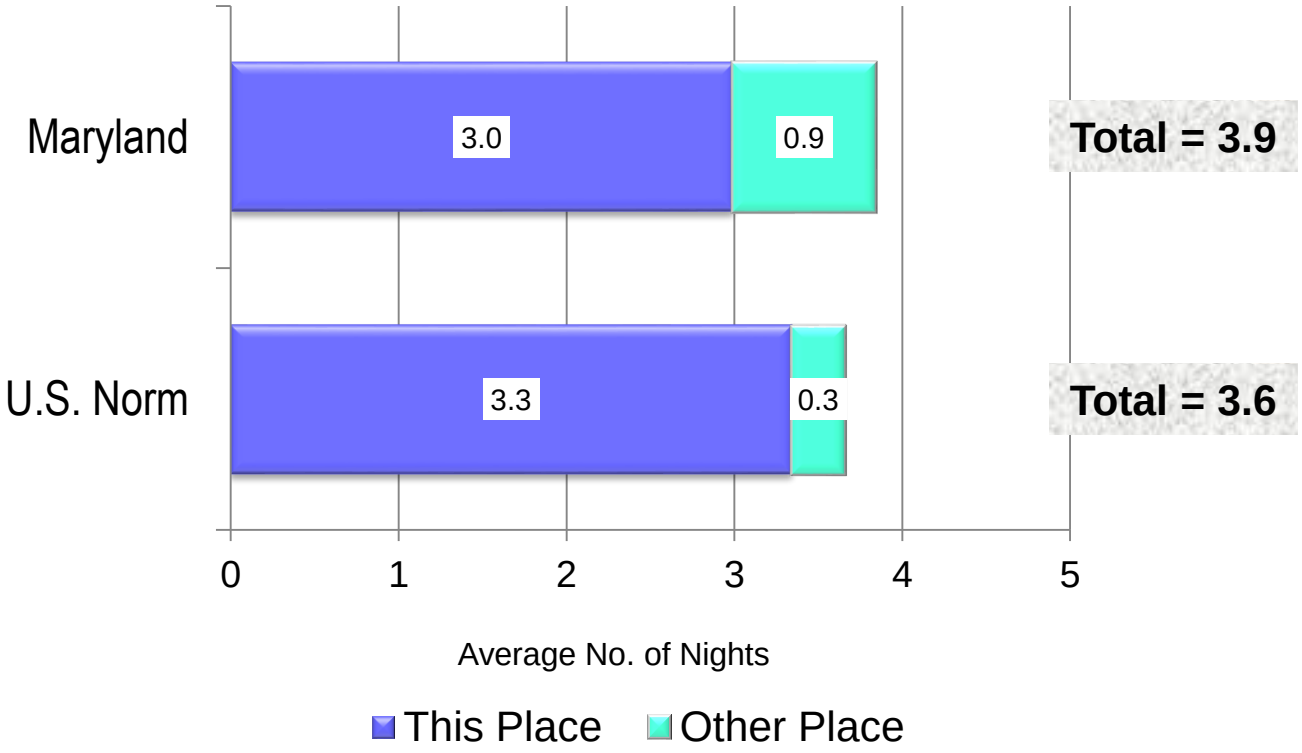
Base: Overnight Person-Trips with 1+ Nights Spent In Maryland

Average Nights Spent in Maryland = 3.3



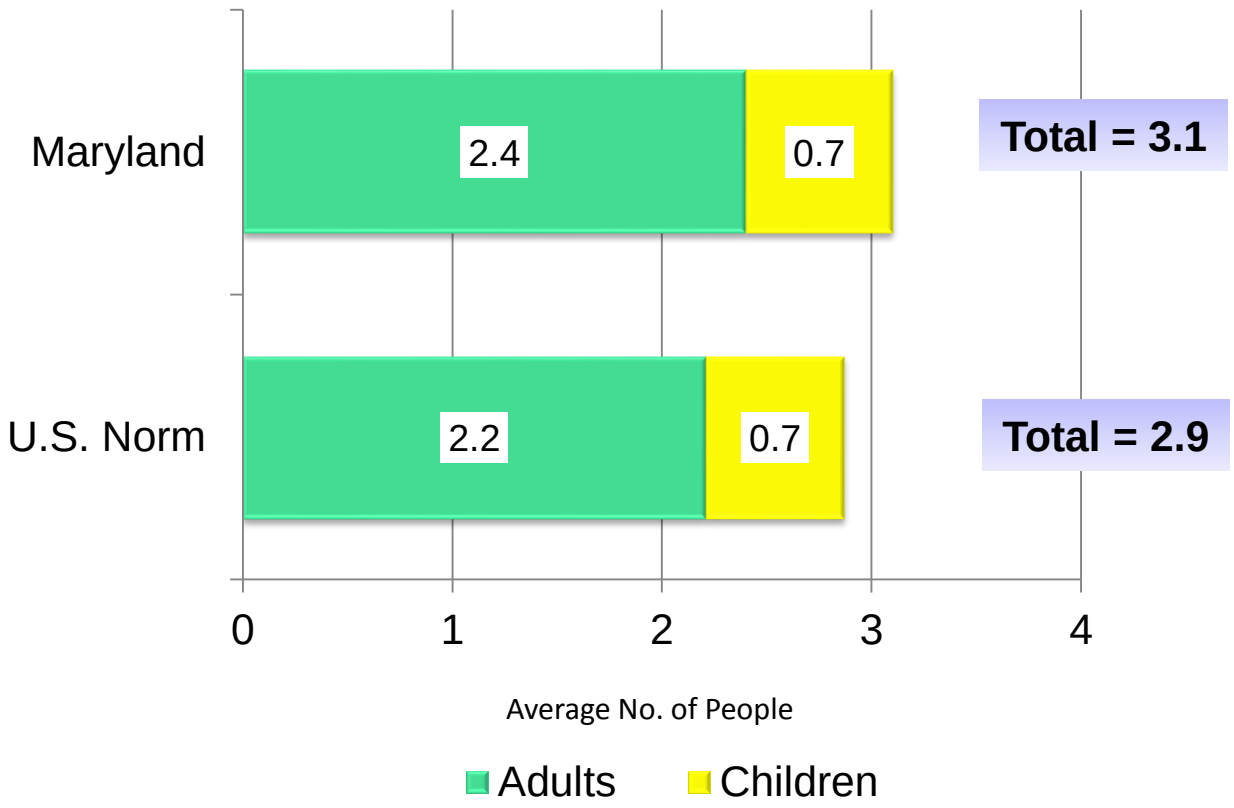
Length of Stay

Base: Overnight Leisure Trips



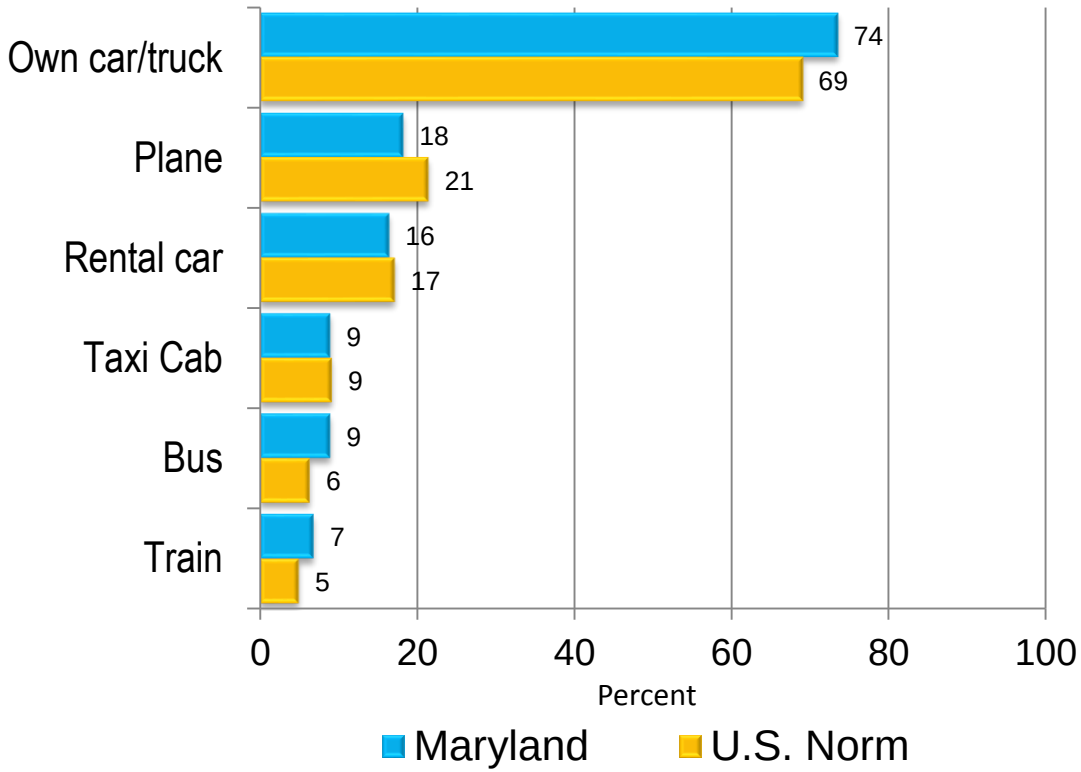
Size of Travel Party

Base: Overnight Person-Trips



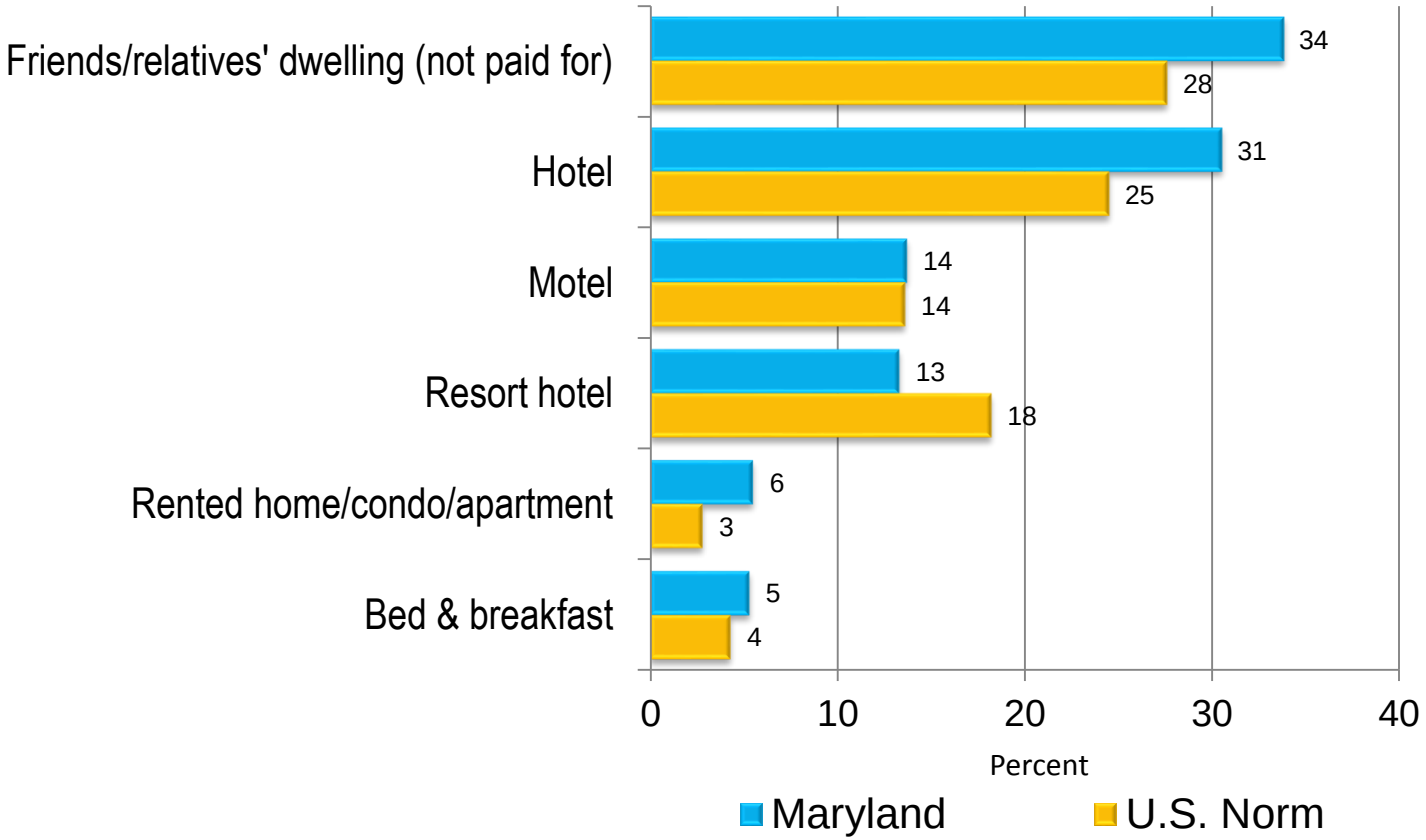
Transportation

Base: Overnight Person-Trips



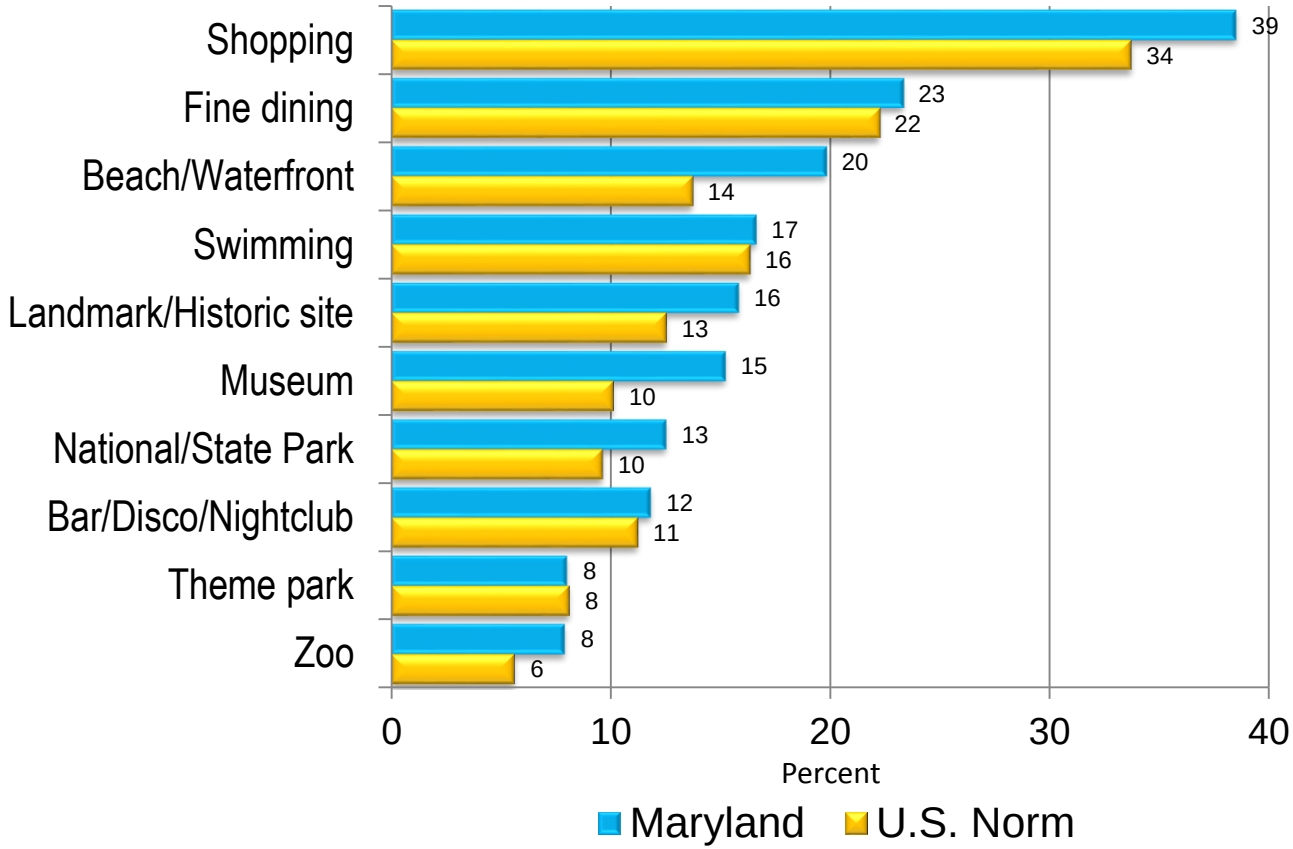
Accommodations

Base: Overnight Person-Trips



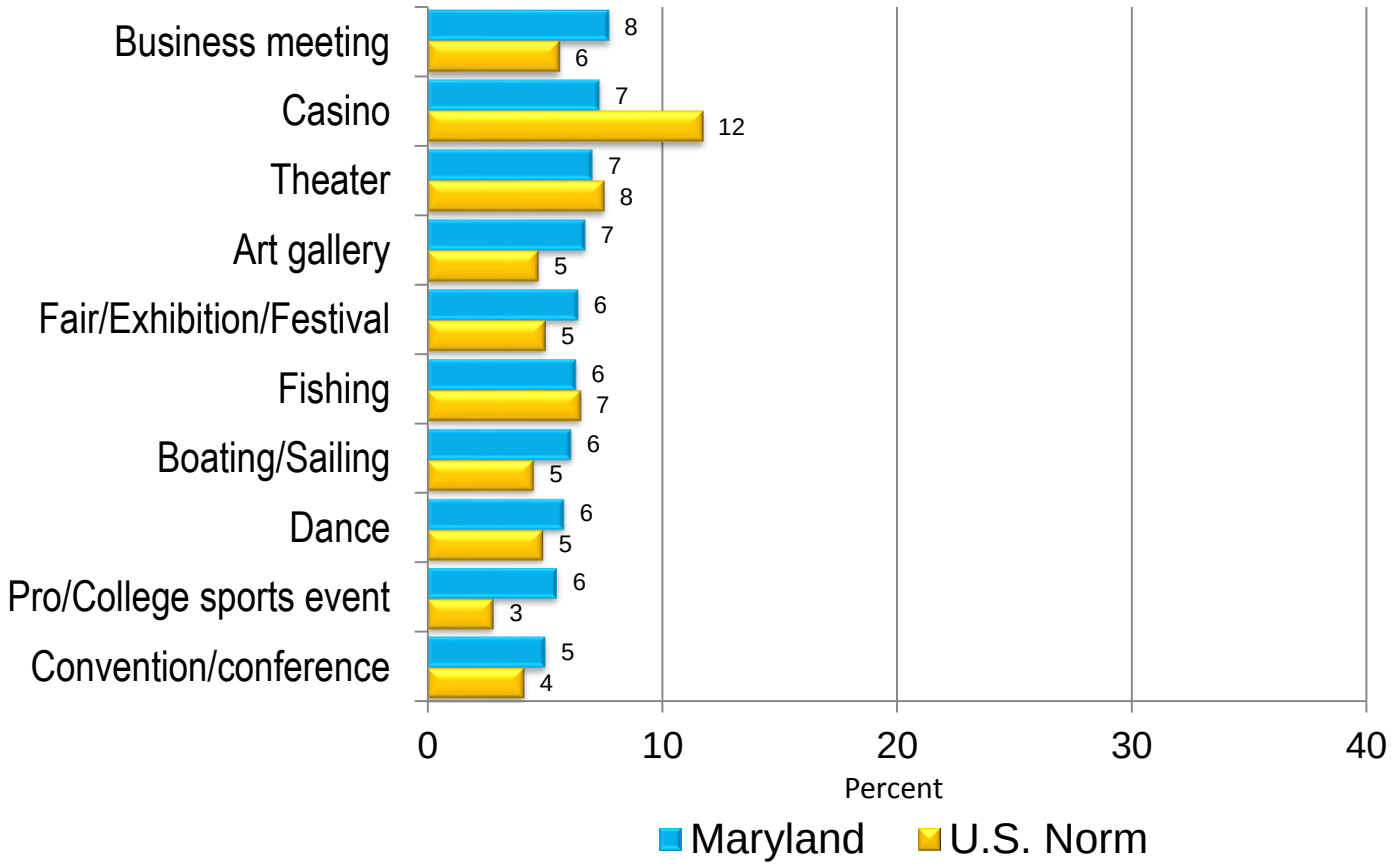
Activities and Experiences

Base: Overnight Person-Trips



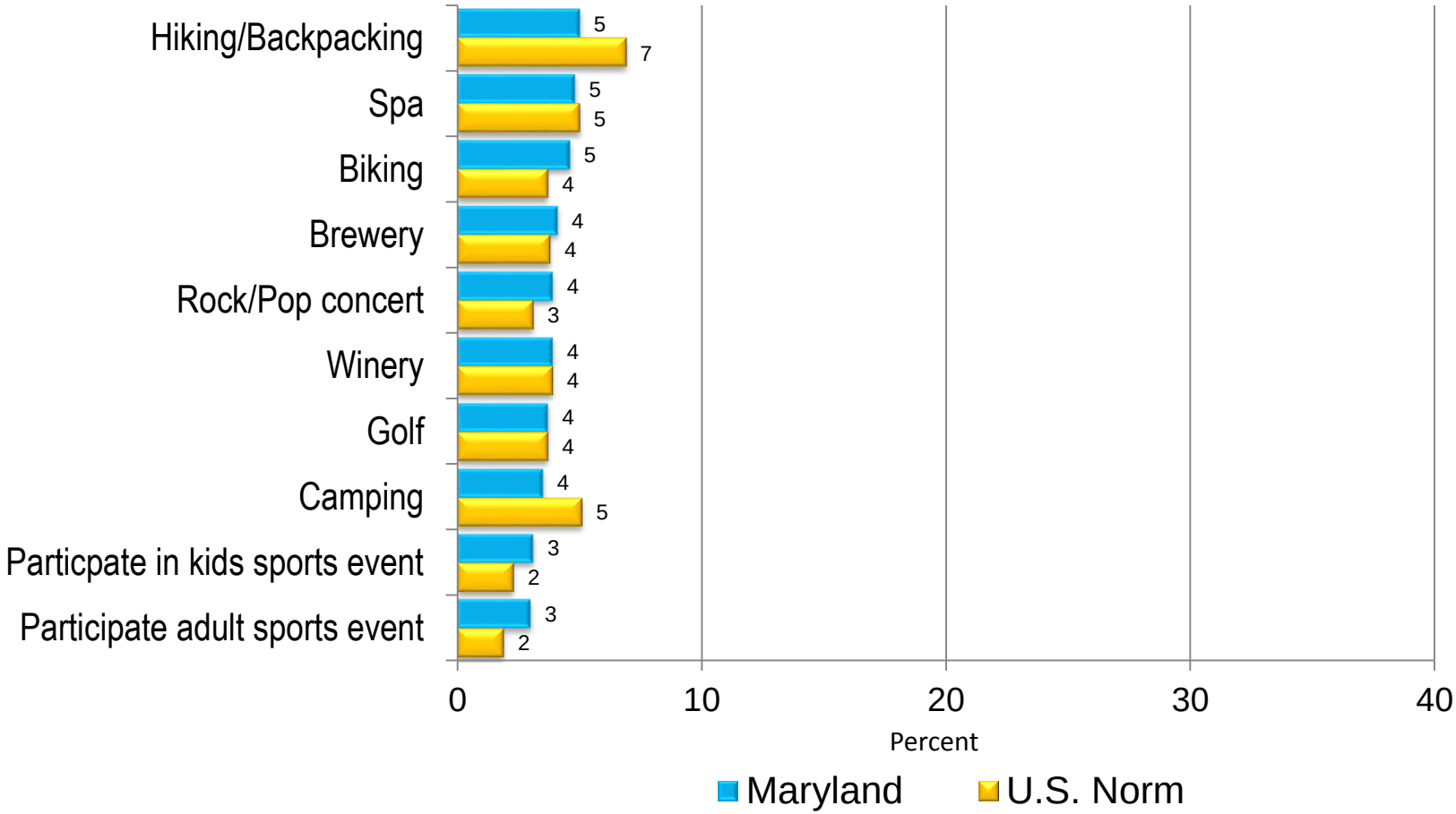
Activities and Experiences (Cont'd)

Base: Overnight Person-Trips



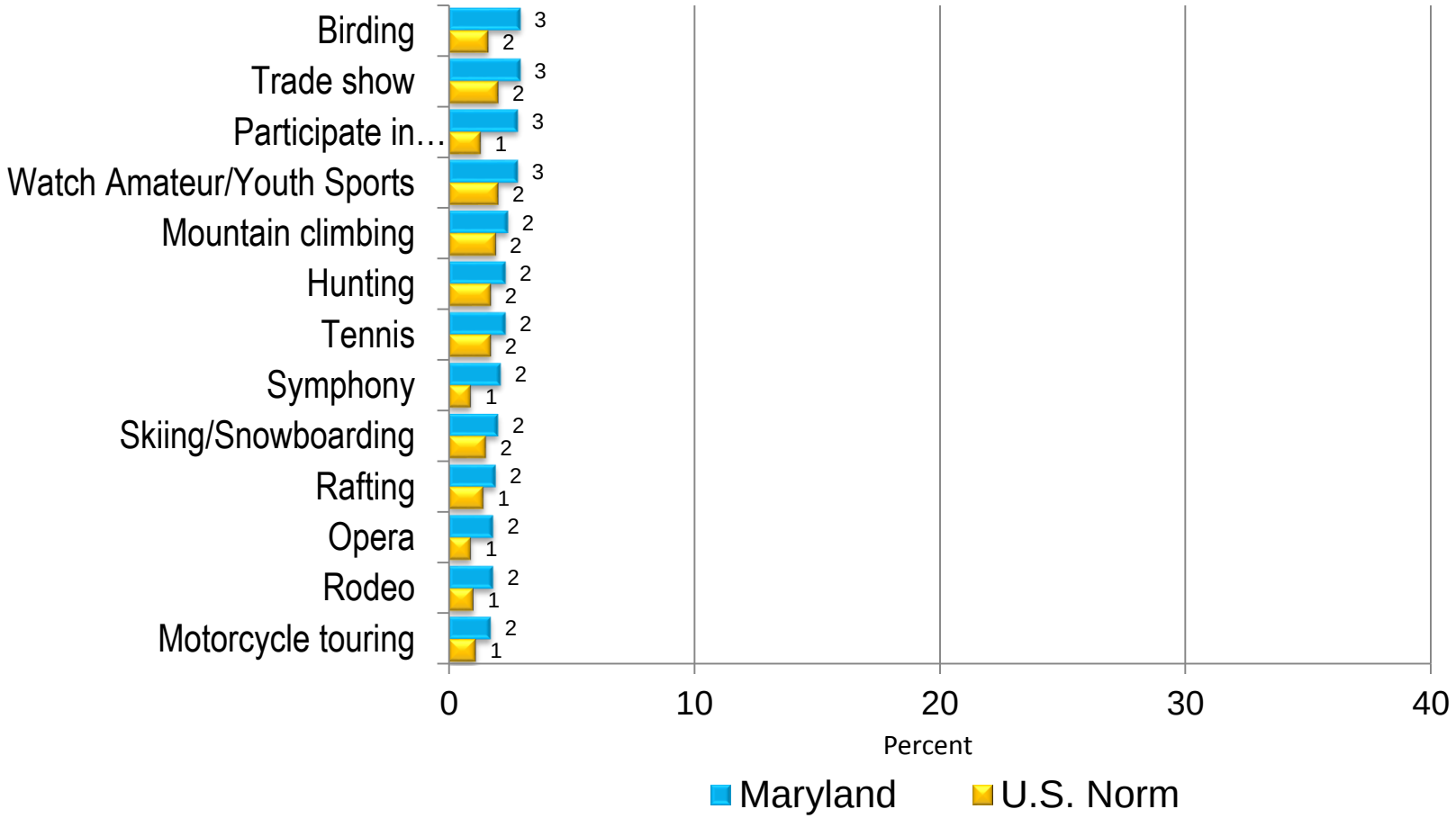
Activities and Experiences (Cont'd)

Base: Overnight Person-Trips



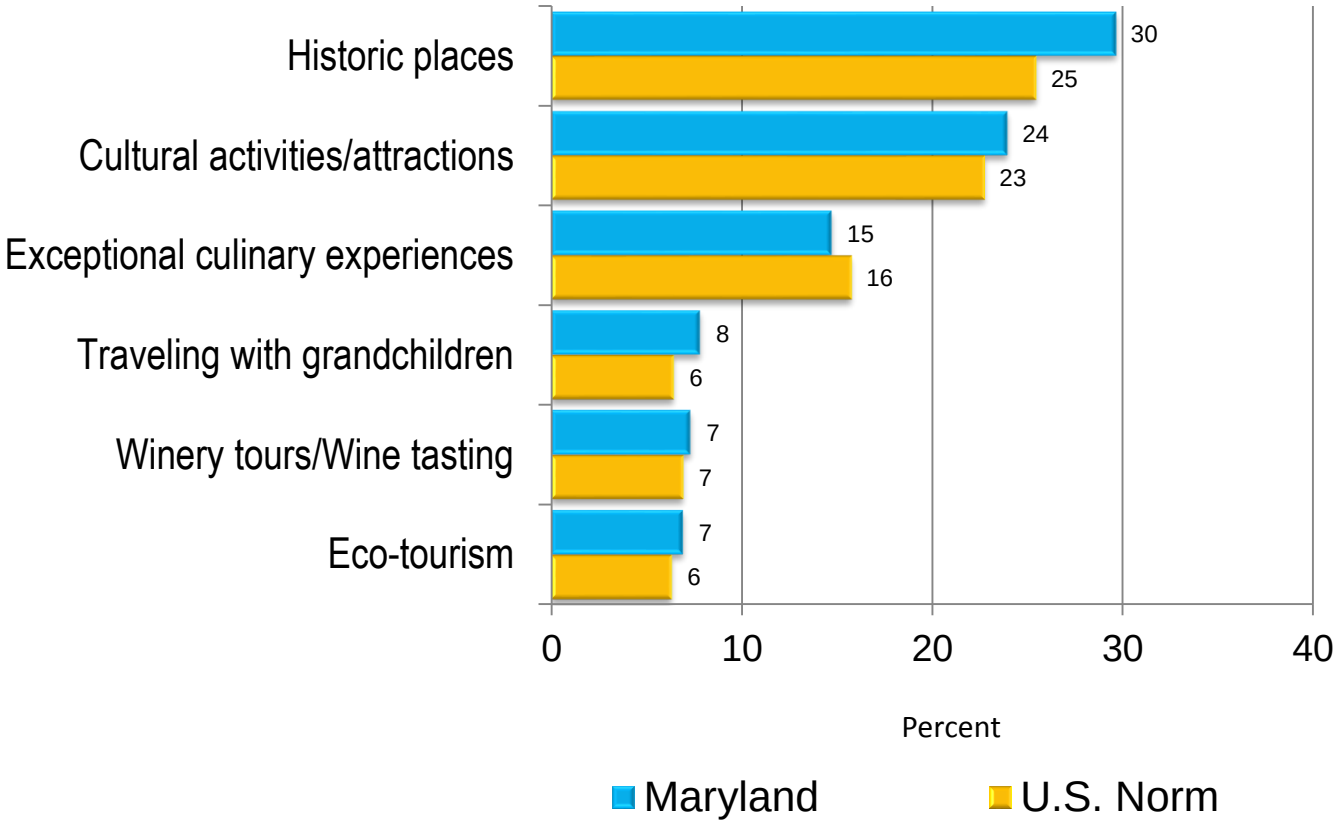
Activities and Experiences (Cont'd)

Base: Overnight Person-Trips



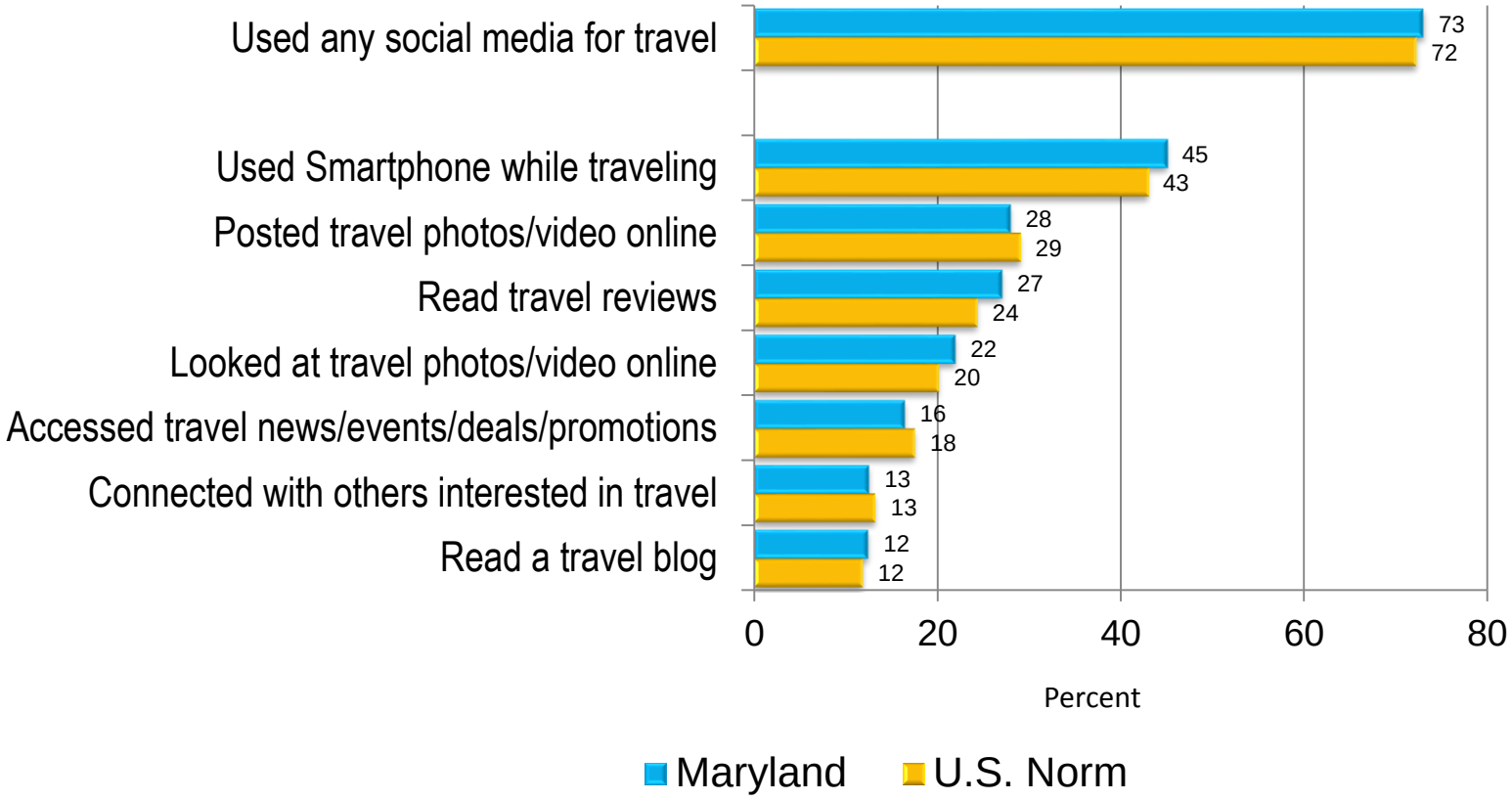
Activities of Special Interest

Base: Overnight Person-Trips



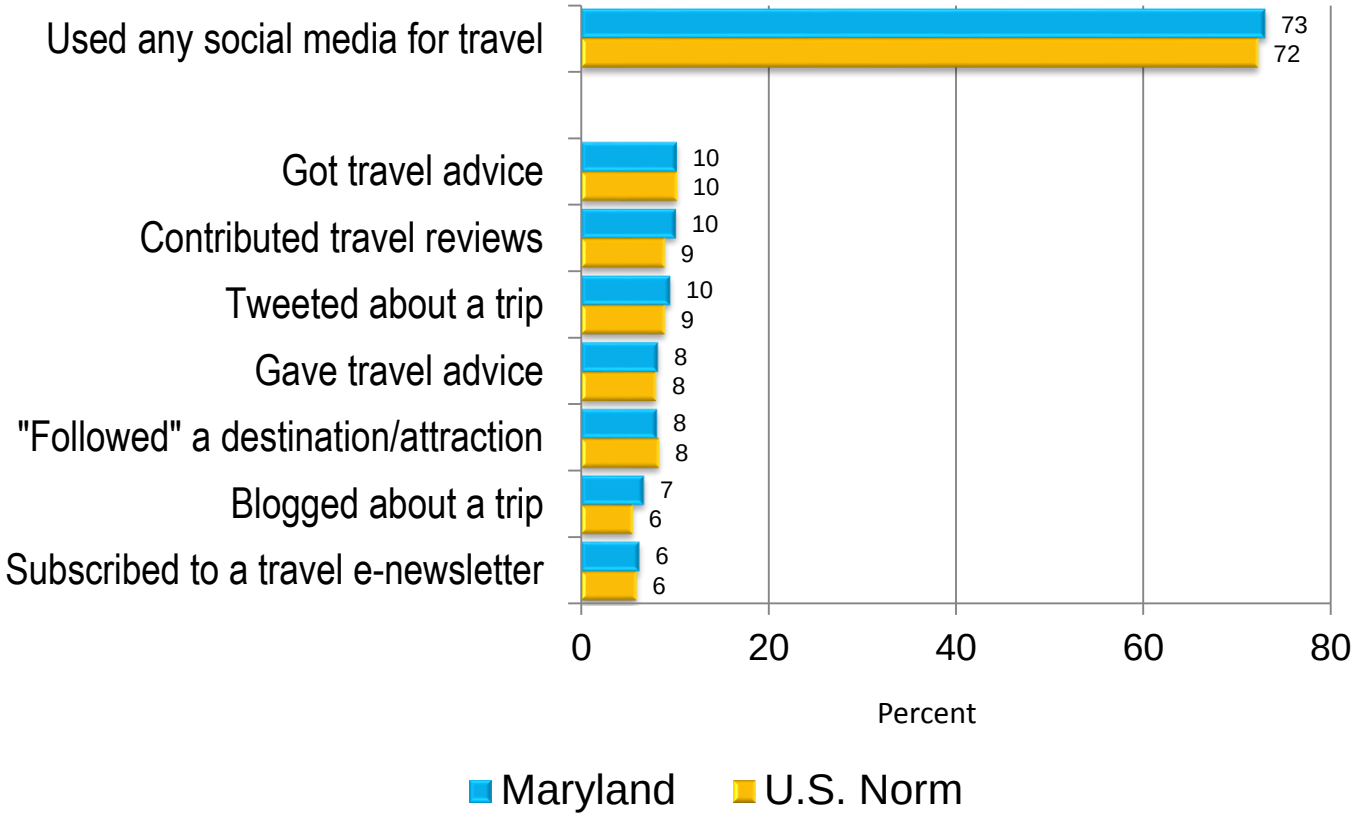
Online Social Media Use by Travelers

Base: Overnight Person-Trips



Online Social Media Use by Travelers (Cont'd)

Base: Overnight Person-Trips



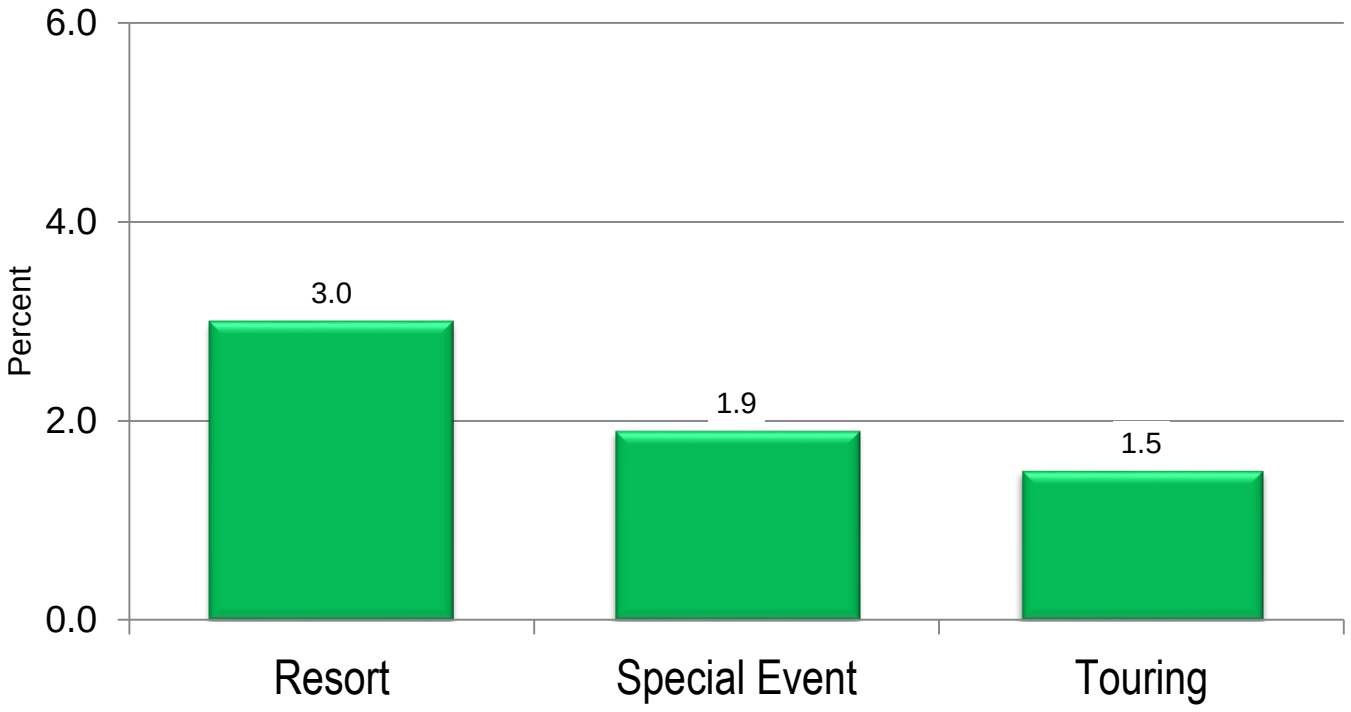
Overnight Trip Characteristics of Resort, Special Event and Touring Main Purpose Trips

Maryland's Share of Adult Domestic Overnight Trips

State	Rank	Share
California	1	10.8
Florida	2	8.7
Texas	3	6.3
New York	4	5.3
Pennsylvania	5	4.4
Nevada	6	4.0
Georgia	7	3.8
Illinois	8	3.8
North Carolina	9	3.5
Ohio	10	3.4
Michigan	11	3.3
New Jersey	12	3.2
Tennessee	13	3.2
Virginia	14	3.1
Arizona	15	3.0
Wisconsin	16	2.5
Missouri	17	2.5
Washington	18	2.4
South Carolina	19	2.4
Colorado	20	2.3

State	Rank	Share
Indiana	21	2.3
Alabama	22	2.1
Oregon	23	2.1
Massachusetts	24	2.1
Maryland	**25**	**2.1**
Minnesota	26	2.1
Kentucky	27	1.7
Louisiana	28	1.6
Connecticut	29	1.4
Iowa	30	1.4
Mississippi	31	1.3
Arkansas	32	1.3
Oklahoma	33	1.2
Utah	34	1.1
West Virginia	35	1.0
Kansas	36	1.0
New Mexico	37	1.0
Maine	38	0.9
New Hampshire	39	0.8
Idaho	40	0.8

Maryland's Domestic Share of Key Leisure Segments



Maryland's National Share of Adult Domestic Overnight Resort Trips

State	Rank	Share	State	Rank	Share
Florida	1	19.3%	Missouri	21	1.3%
South Carolina	2	9.8%	Delaware	22	1.2%
California	3	9.5%	Ohio	23	1.2%
Hawaii	4	5.2%	Michigan	24	1.1%
New Jersey	5	4.7%	New Hampshire	25	1.1%
North Carolina	6	4.5%	Maine	26	1.0%
Texas	7	3.2%	Colorado	27	0.9%
Virginia	8	3.1%	Illinois	28	0.9%
Maryland	9	3.0%	New Mexico	29	0.6%
Oregon	10	2.5%	Utah	30	0.6%
Nevada	11	2.2%	Arkansas	31	0.5%
New York	12	2.1%	Connecticut	32	0.5%
Alabama	13	2.0%	Indiana	33	0.5%
Tennessee	14	2.0%	Minnesota	34	0.5%
Georgia	15	1.9%	Mississippi	35	0.5%
Pennsylvania	16	1.8%	Rhode Island	36	0.5%
Wisconsin	17	1.7%	Vermont	37	0.5%
Arizona	18	1.6%	West Virginia	38	0.5%
Massachusetts	19	1.6%	Alaska	39	0.4%
Washington	20	1.4%	Idaho	40	0.4%

Maryland's National Share of Adult Domestic Overnight Special Event Trips

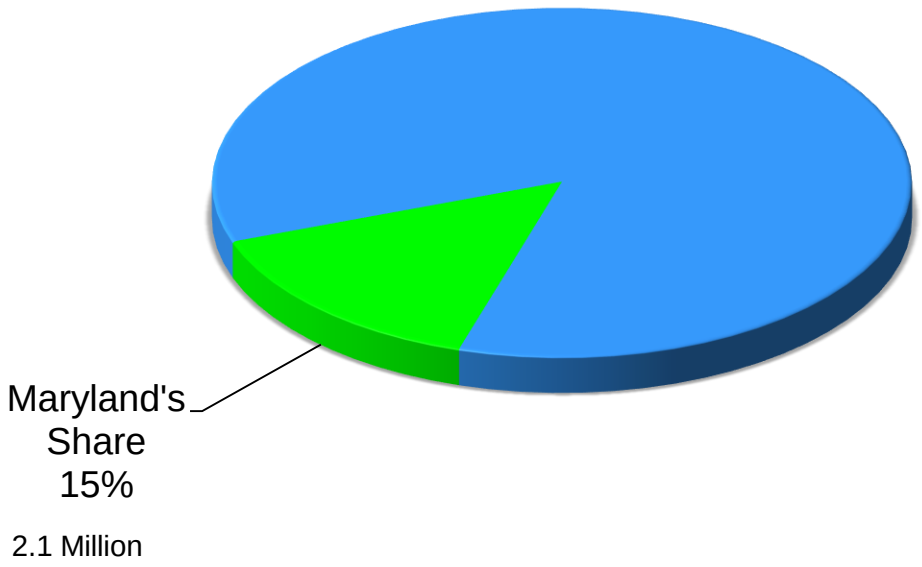
State	Rank	Share	State	Rank	Share
California	1	10.5%	Michigan	21	2.2%
New York	2	6.3%	Minnesota	22	2.1%
Florida	3	6.2%	Alabama	23	2.0%
Texas	4	5.9%	South Carolina	24	2.0%
Pennsylvania	5	4.4%	Maryland	25	1.9%
Ohio	6	4.3%	Massachusetts	26	1.9%
Illinois	7	4.1%	Oregon	27	1.8%
North Carolina	8	3.7%	Kentucky	28	1.4%
Nevada	9	3.6%	Louisiana	29	1.4%
Georgia	10	3.4%	Oklahoma	30	1.3%
Tennessee	11	2.9%	Iowa	31	1.2%
Indiana	12	2.7%	New Hampshire	32	1.2%
Missouri	13	2.5%	New Mexico	33	1.2%
Virginia	14	2.5%	Arkansas	34	1.1%
Wisconsin	15	2.5%	Nebraska	35	1.1%
Arizona	16	2.3%	Connecticut	36	1.0%
Colorado	17	2.3%	Utah	37	0.9%
New Jersey	18	2.3%	Hawaii	38	0.8%
Washington	19	2.3%	Kansas	39	0.8%
Michigan	20	2.2%	West Virginia	40	0.8%

Maryland's Share of Adult Domestic Overnight Touring Trips

State	Rank	Share	State	Rank	Share
California	1	12.0%	Massachusetts	21	2.2%
Florida	2	6.8%	New Mexico	22	2.2%
New York	3	6.5%	Ohio	23	2.2%
Tennessee	4	5.0%	Wisconsin	24	2.1%
Arizona	5	4.3%	Missouri	25	1.8%
Texas	6	4.2%	New Jersey	26	1.8%
North Carolina	7	3.9%	Maine	27	1.7%
Georgia	8	3.6%	New Hampshire	28	1.7%
Pennsylvania	9	3.6%	Alabama	29	1.6%
Virginia	10	3.4%	Arkansas	30	1.6%
Nevada	11	3.2%	Utah	31	1.6%
Hawaii	12	3.0%	Kentucky	32	1.5%
Colorado	13	2.8%	Maryland	33	1.5%
Oregon	14	2.8%	Indiana	34	1.4%
Washington	15	2.7%	South Dakota	35	1.2%
South Carolina	16	2.6%	Alaska	36	1.1%
Illinois	17	2.5%	Montana	37	1.1%
Michigan	18	2.4%	Wyoming	38	1.1%
Louisiana	19	2.2%	Connecticut	39	1.0%
Massachusetts	20	2.2%	Idaho	40	1.0%

Resort Segment Size & Maryland's Share in Primary Markets*

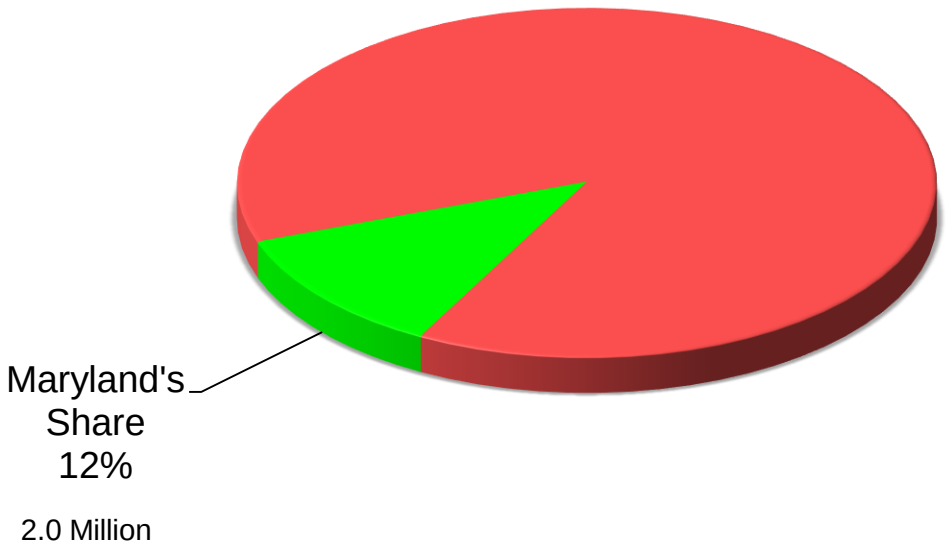
Total Resort Trips in 2013* = 14.3 Million



*Primary Market estimate based on trips taken by residents of the following states: NY, NJ, PA, MD, DE, WDC, VA

Special Event Segment Size & Maryland's Share in Primary Markets*

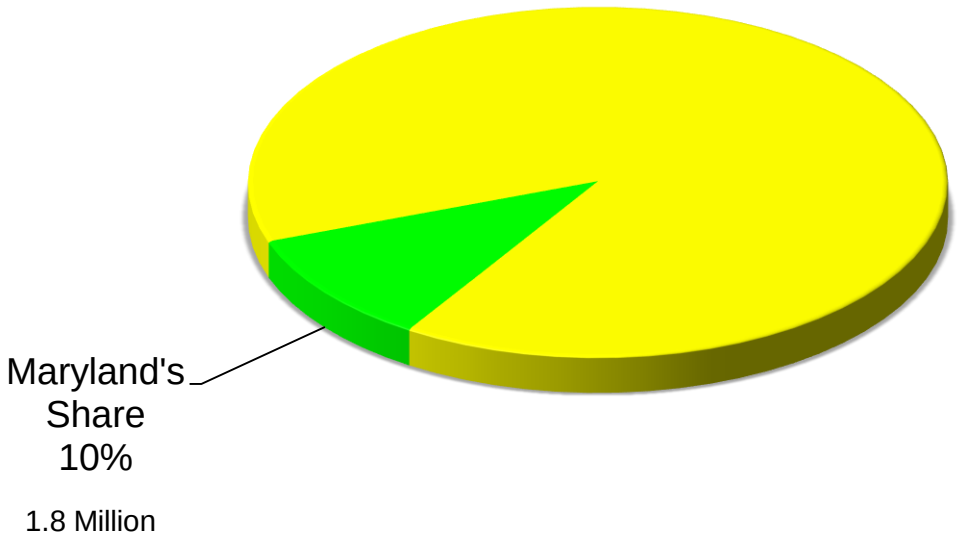
Total Special Event Trips in 2013* = 17.0 Million



*Primary Market estimate based on trips taken by residents of the following states: NY, NJ, PA, MD, DE, WDC, VA

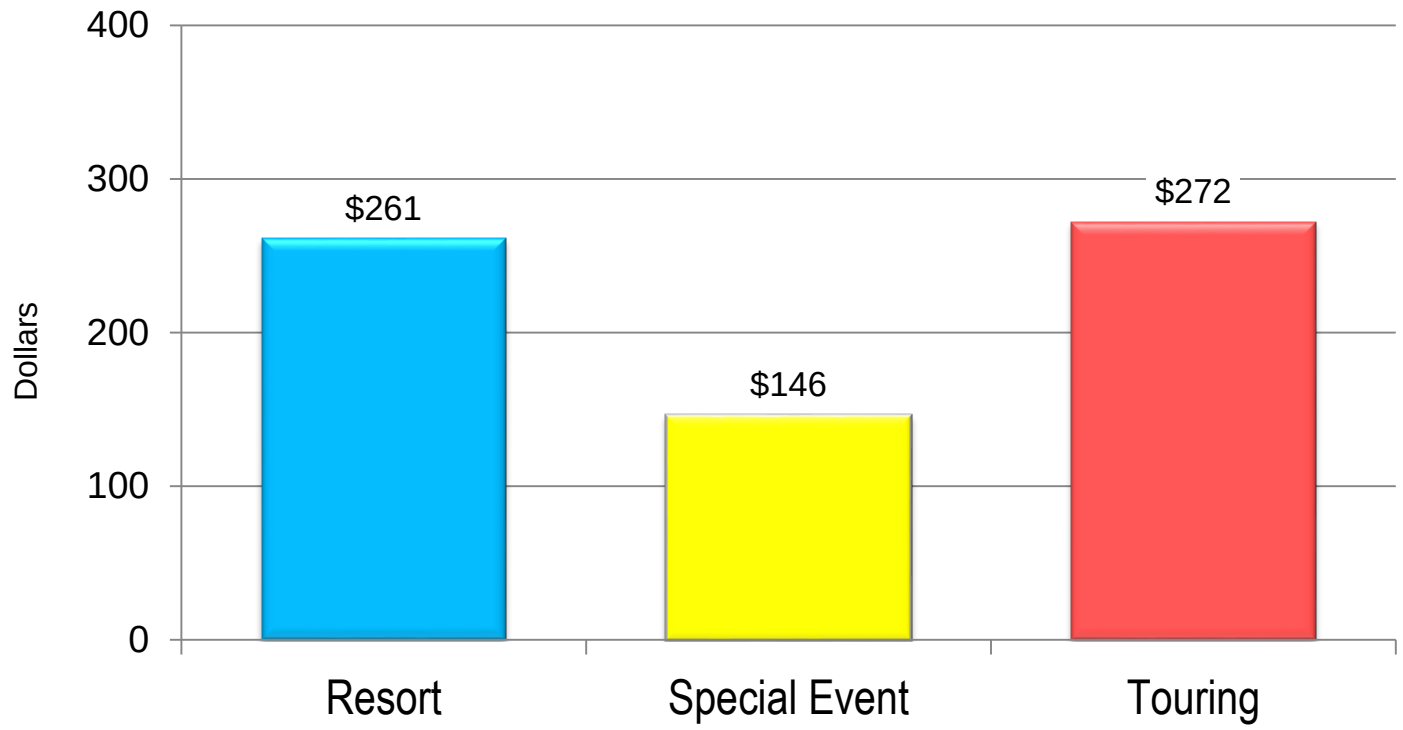
Touring Segment Size & Maryland's Share in Primary Markets*

Total Touring Trips in 2013* = 17.8 Million

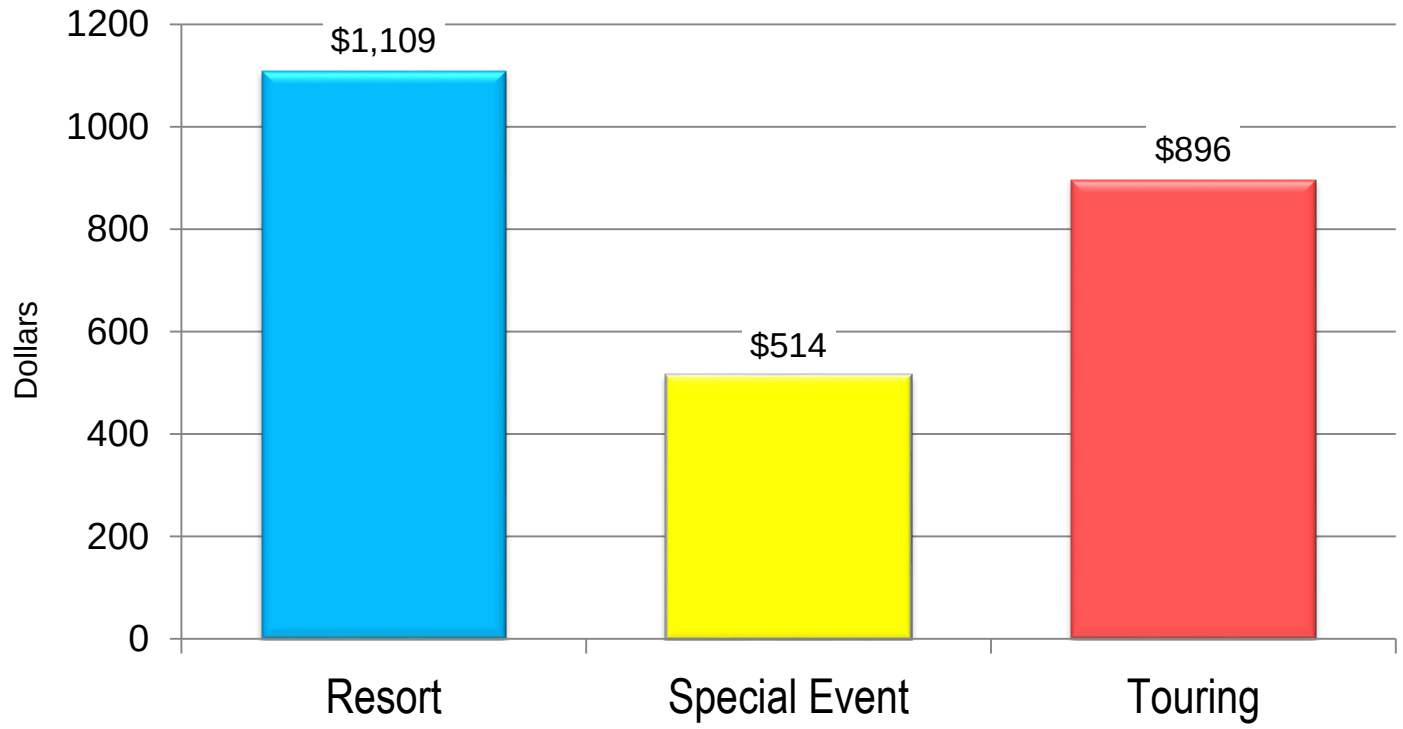


*Primary Market estimate based on trips taken by residents of the following states: NY, NJ, PA, MD, DE, WDC, VA

Average Per Person Expenditures on Overnight Trips — Key Leisure Segments

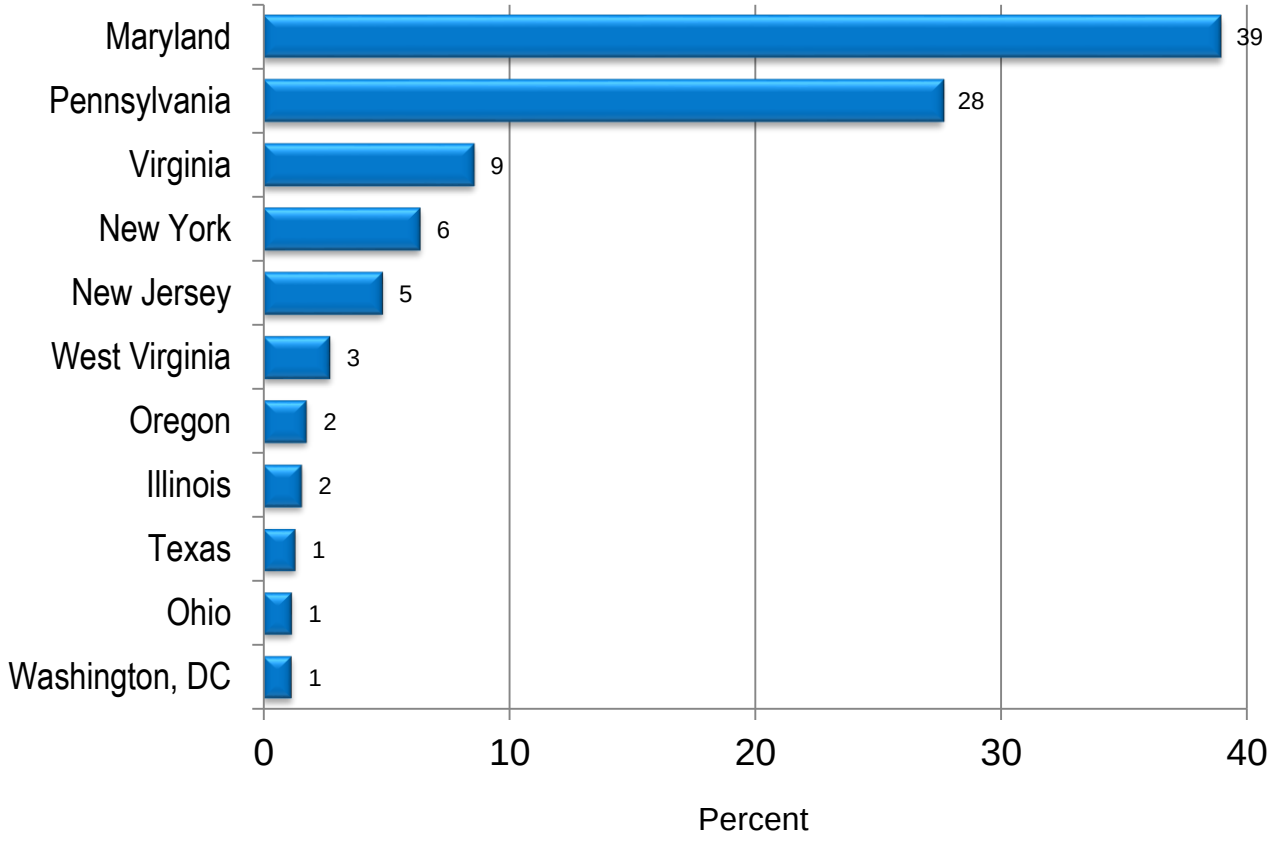


Average Per Party Expenditures on Overnight Trips



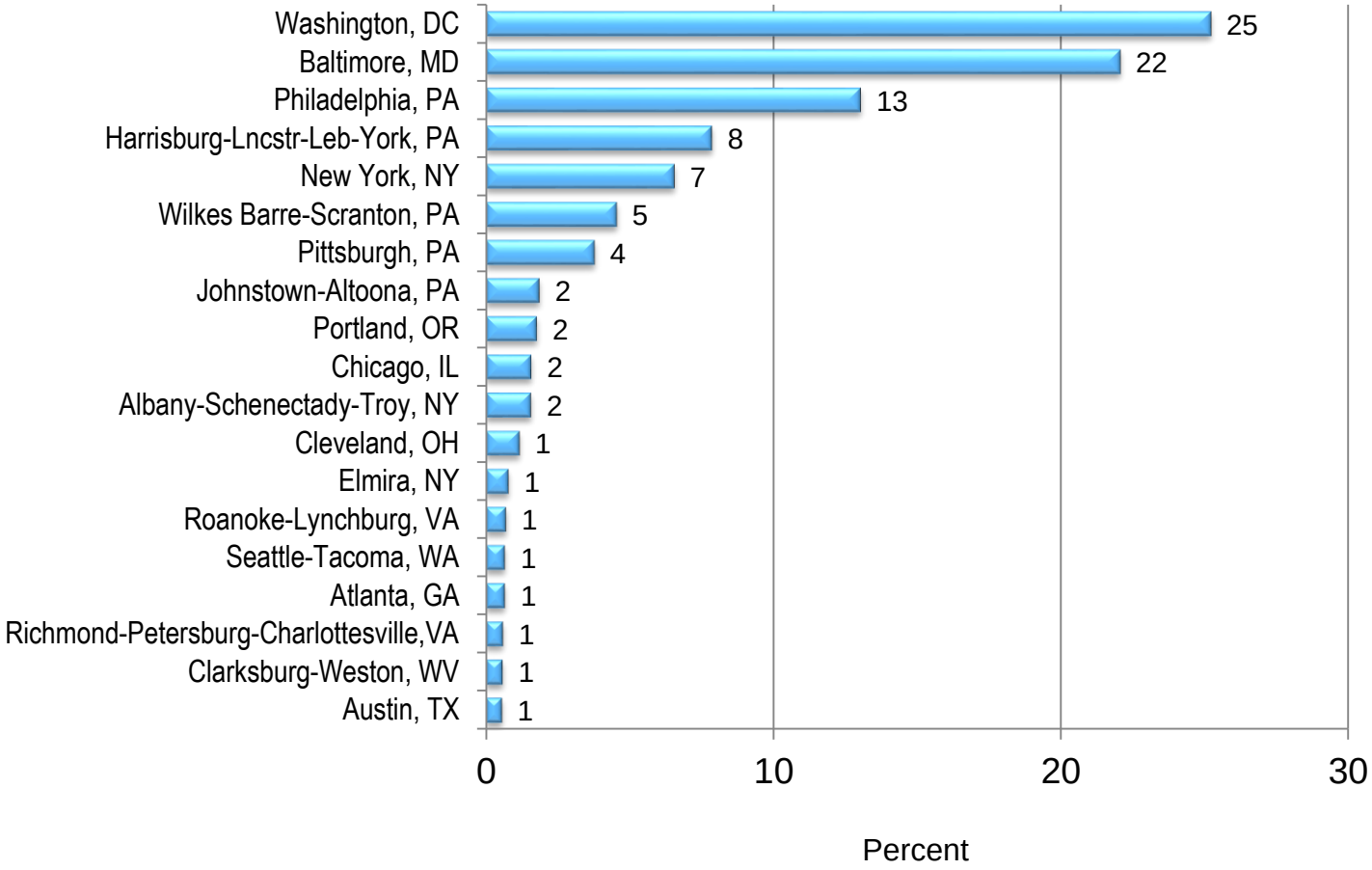
State Sources of Business — Resort Trips

Base: Overnight Resort Trips to Maryland



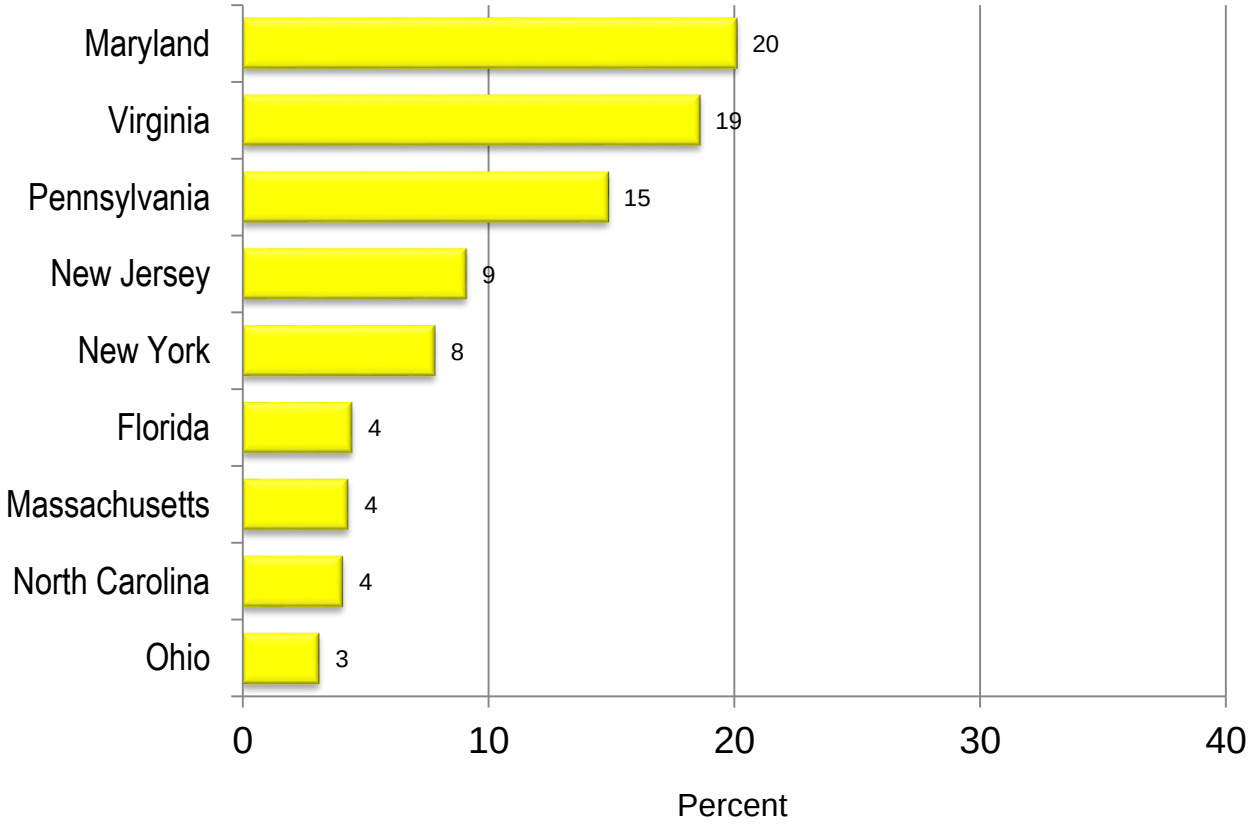
DMA Sources of Business — Resort Trips

Base: Overnight Resort Trips to Maryland



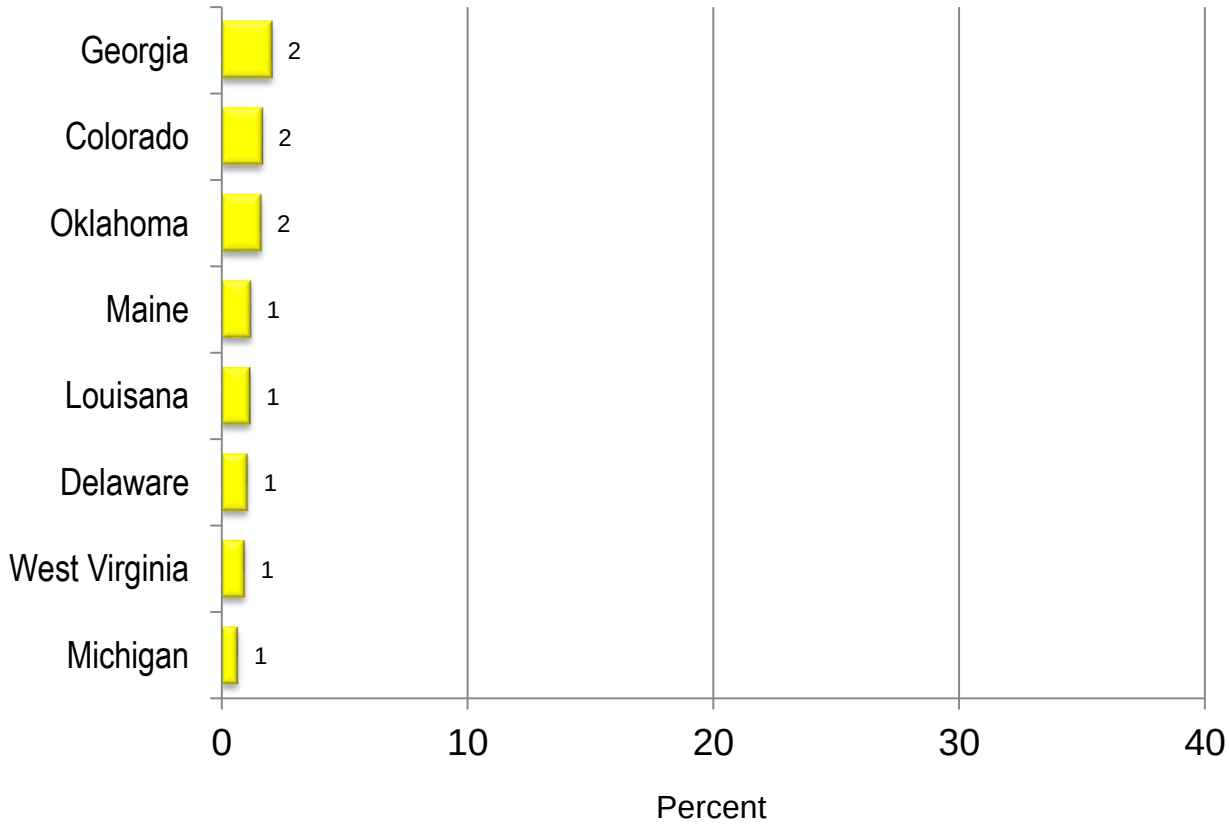
State Sources of Business — Special Event Trips

Base: Overnight Special Event Trips to Maryland



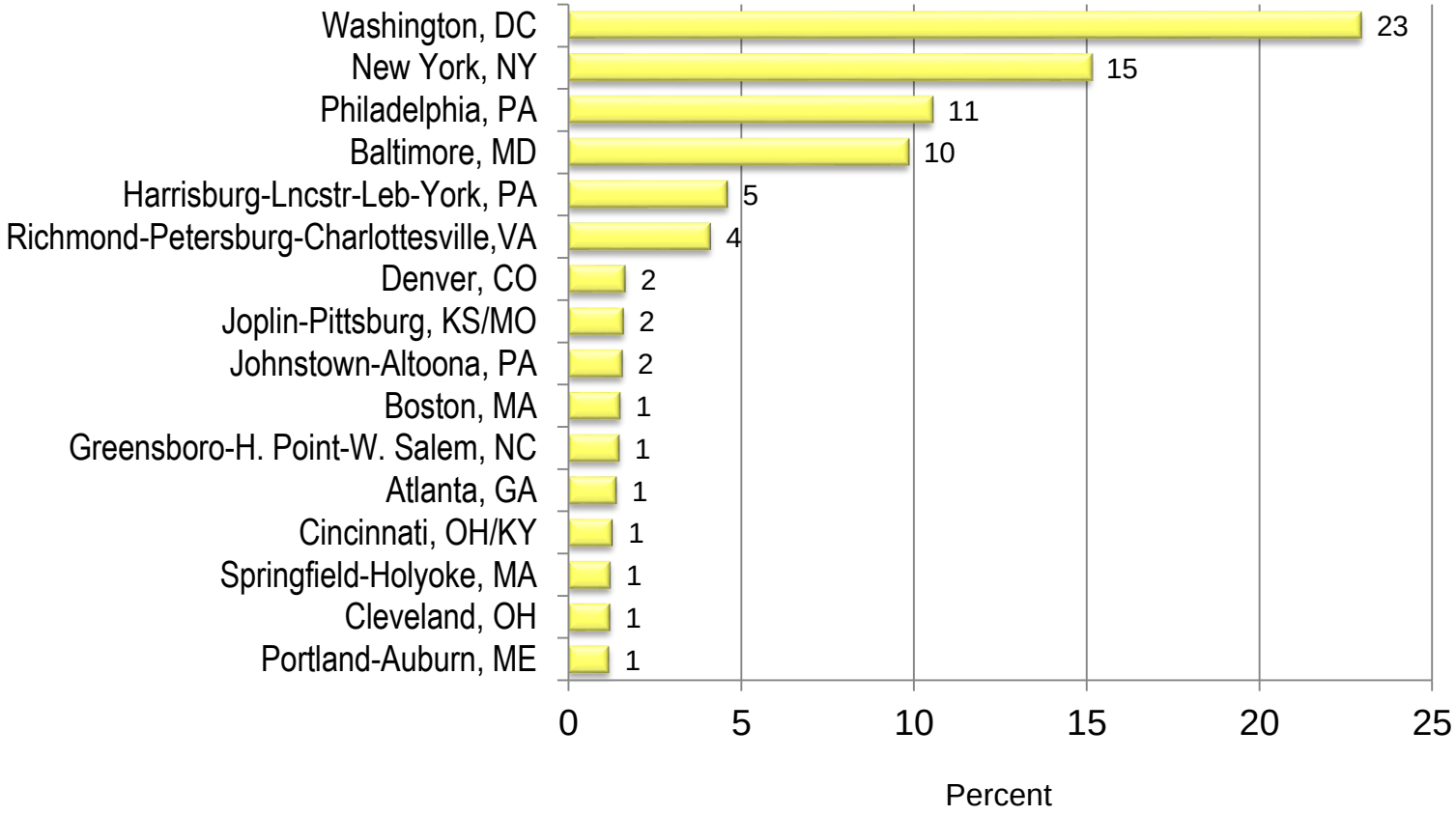
State Sources of Business — Special Event Trips (Cont'd)

Base: Overnight Special Event Trips to Maryland



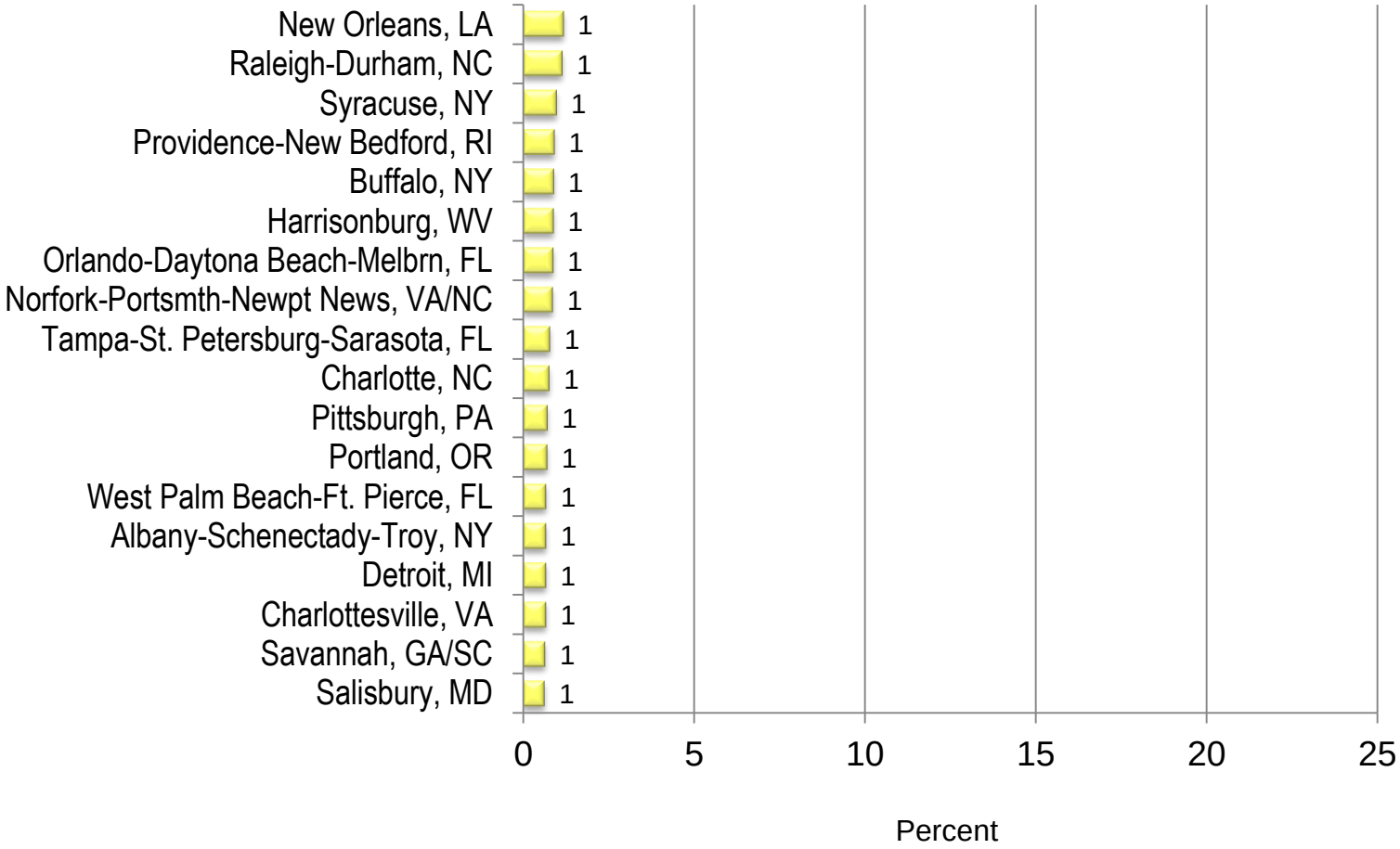
DMA Sources of Business — Special Event Trips

Base: Overnight Special Event Trips to Maryland



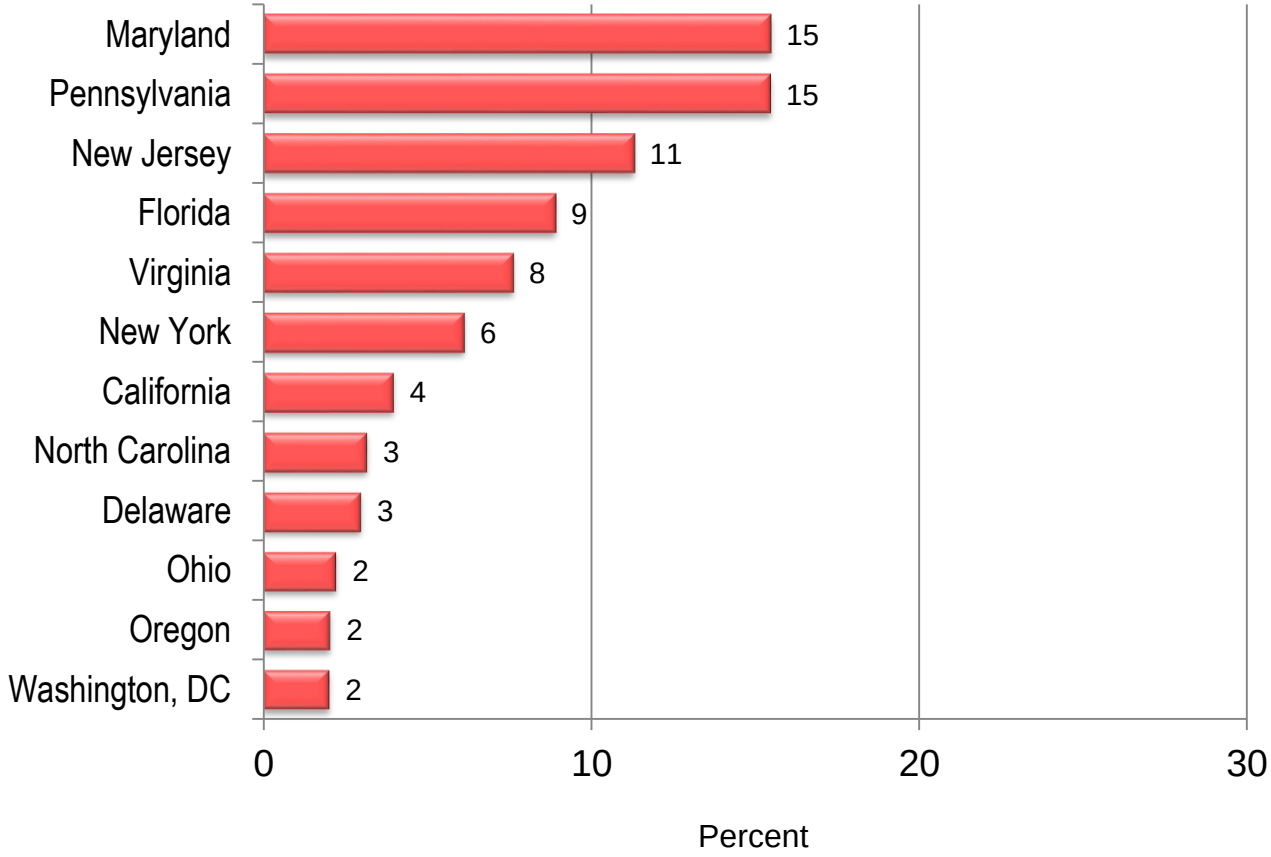
DMA Sources of Business — Special Event Trips (Cont'd)

Base: Overnight Special Event Trips to Maryland



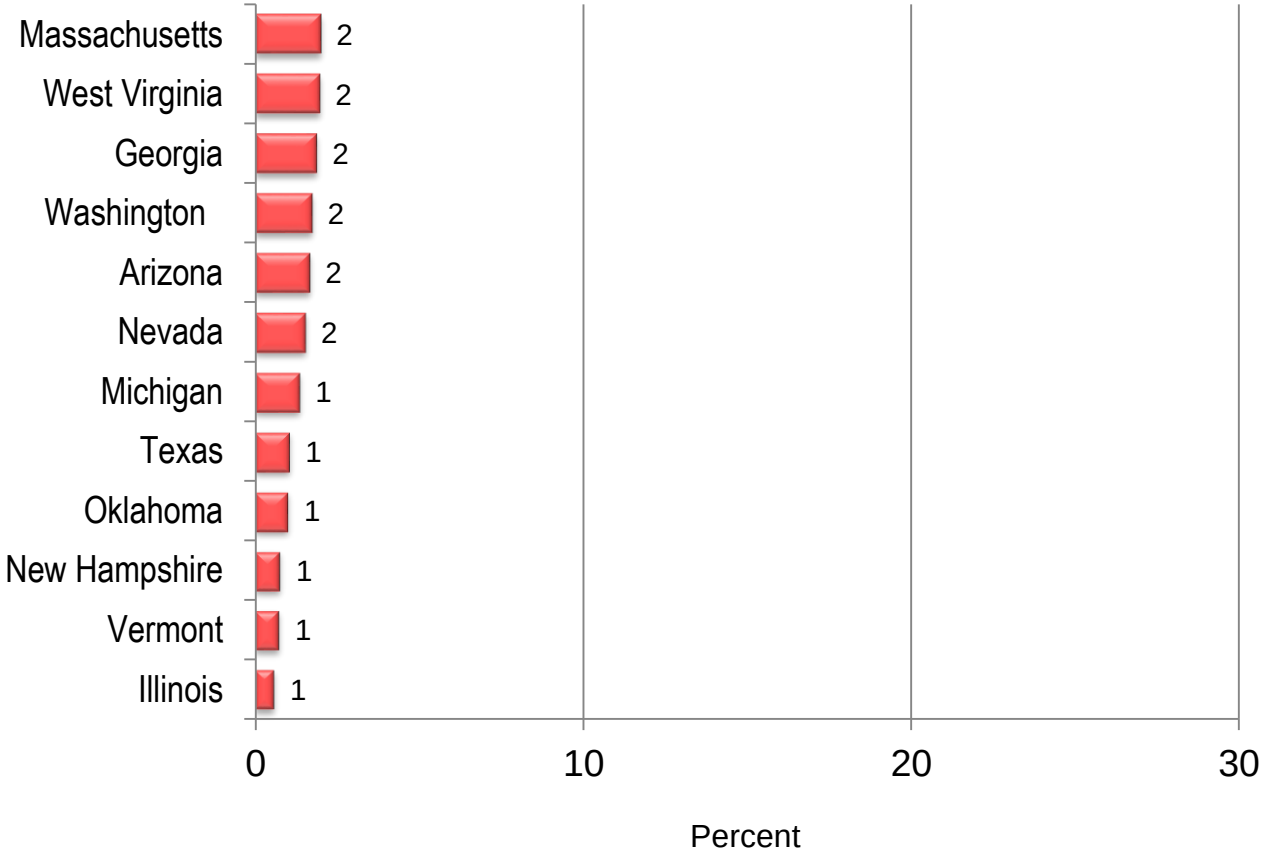
State Sources of Business — Touring Trips

Base: Overnight Touring Trips to Maryland



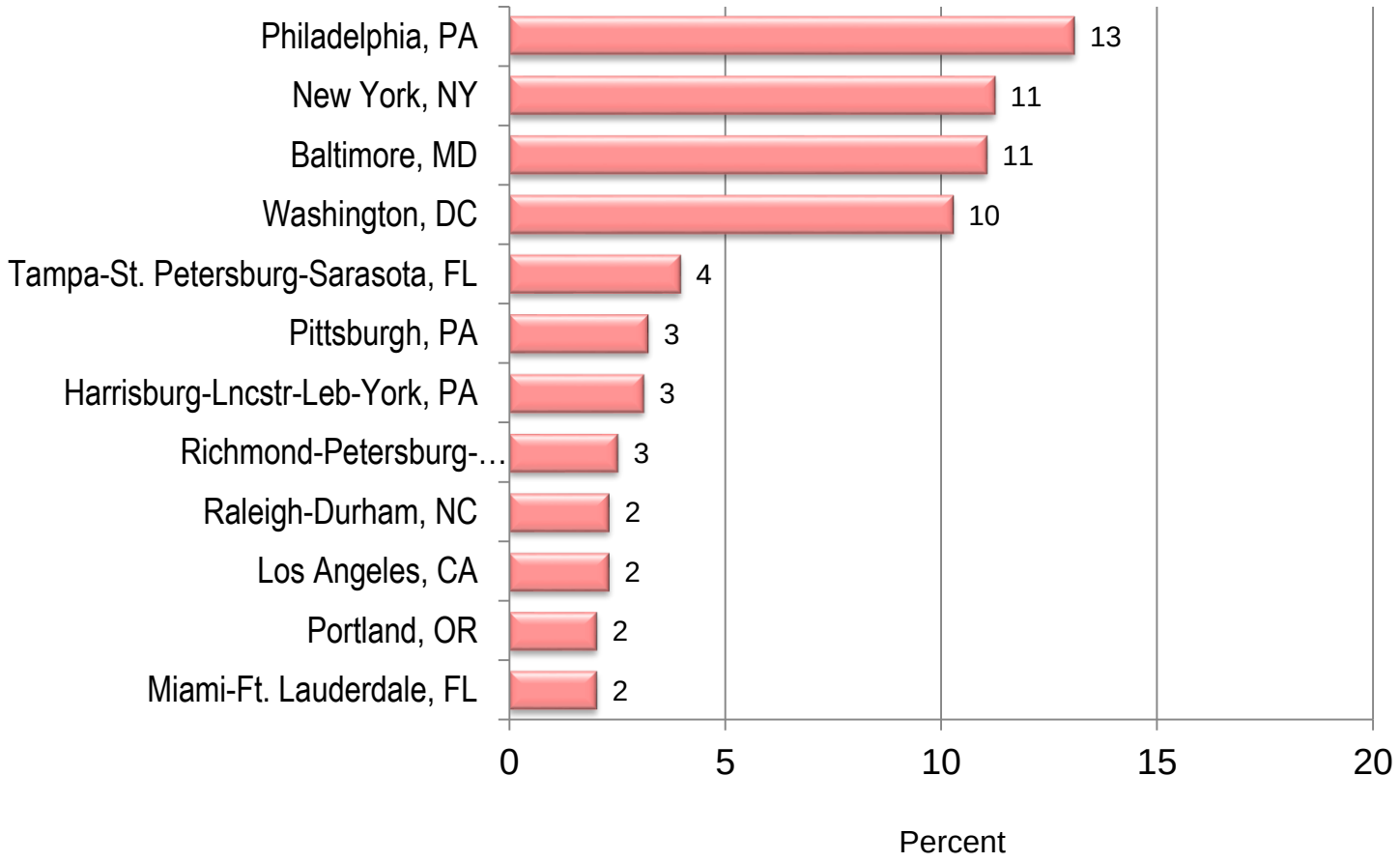
State Sources of Business — Touring Trips (Cont'd)

Base: Overnight Touring Trips to Maryland



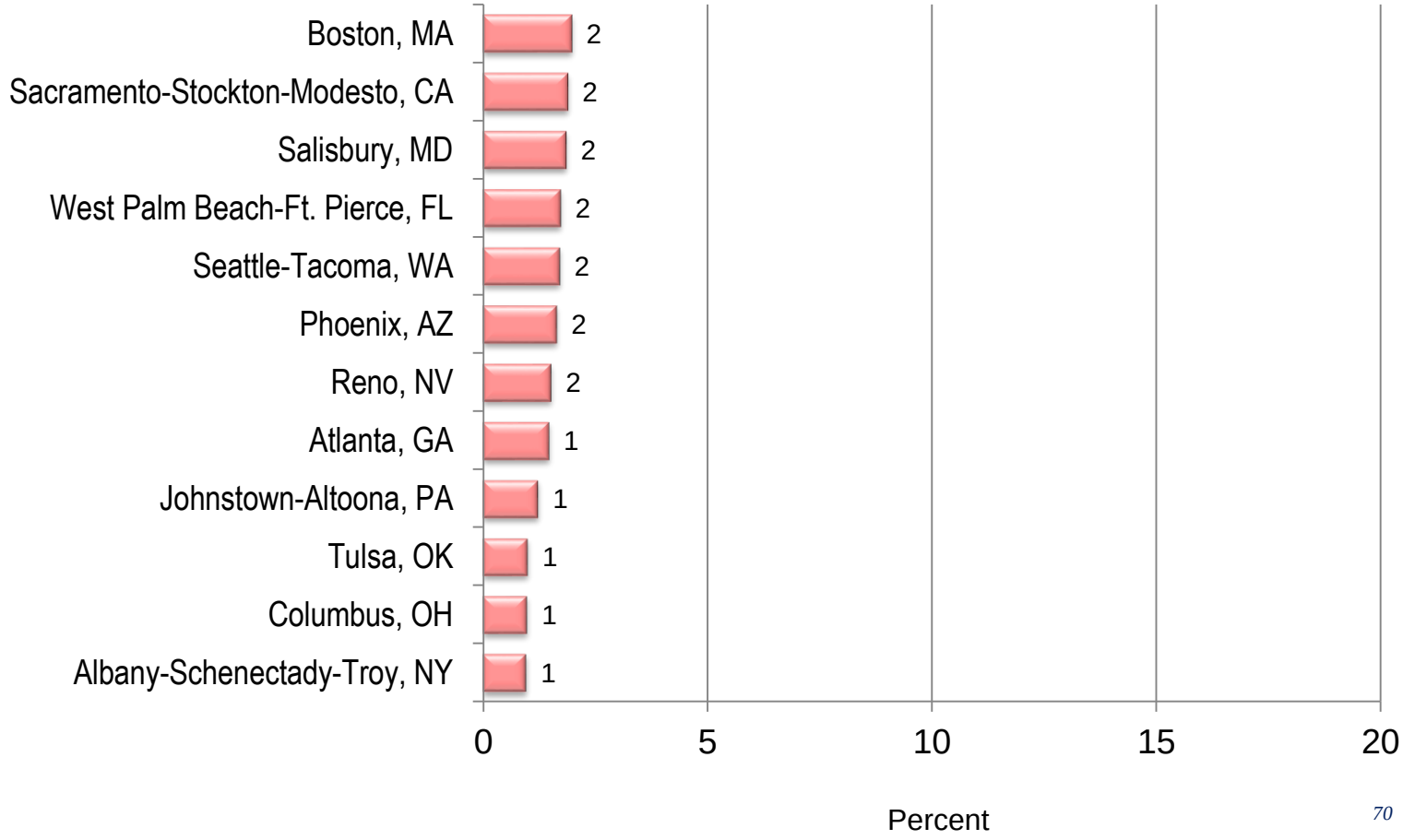
DMA Sources of Business — Touring Trips

Base: Overnight Touring Trips to Maryland



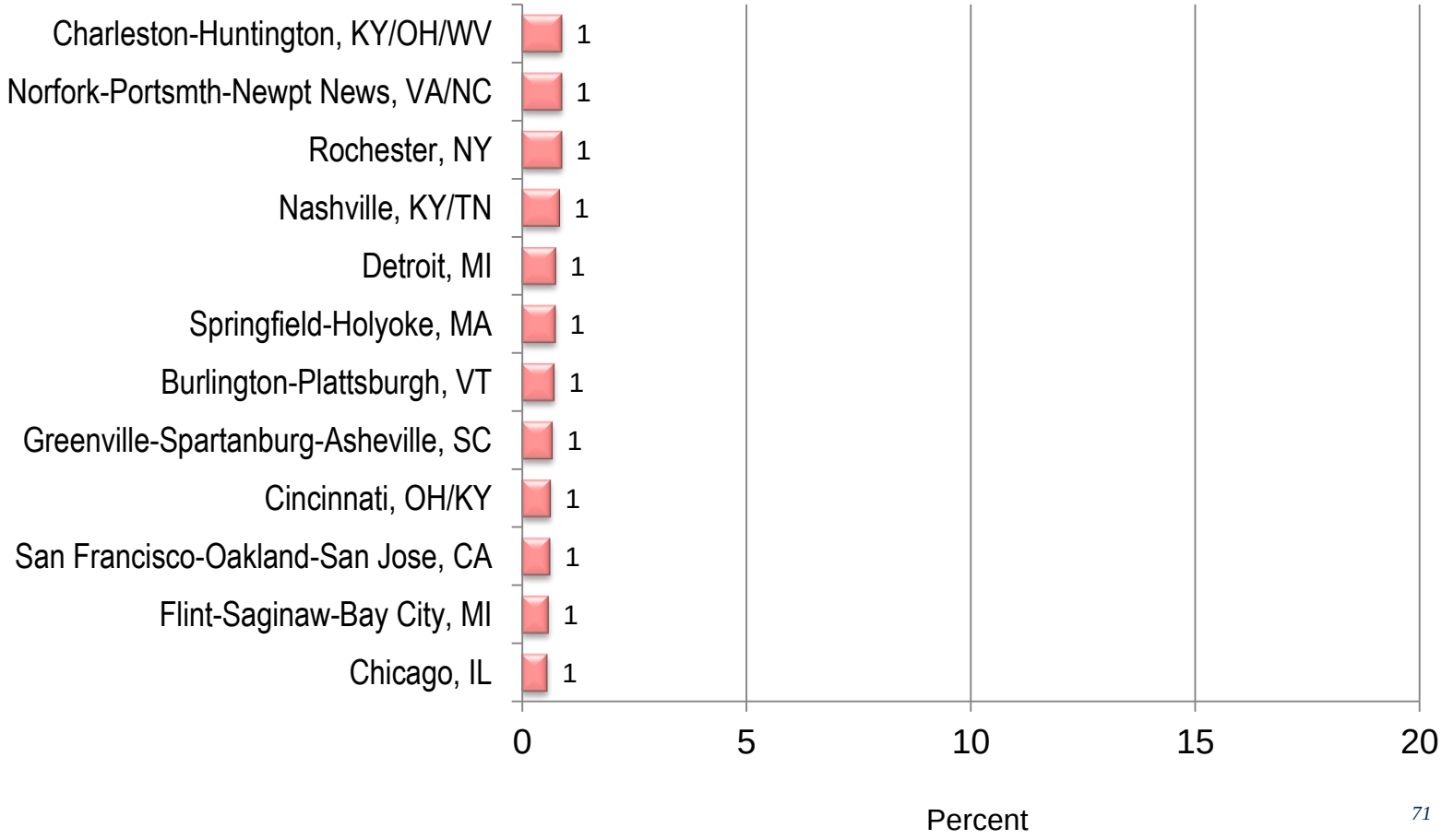
DMA Sources of Business — Touring Trips (Cont'd)

Base: Overnight Touring Trips to Maryland



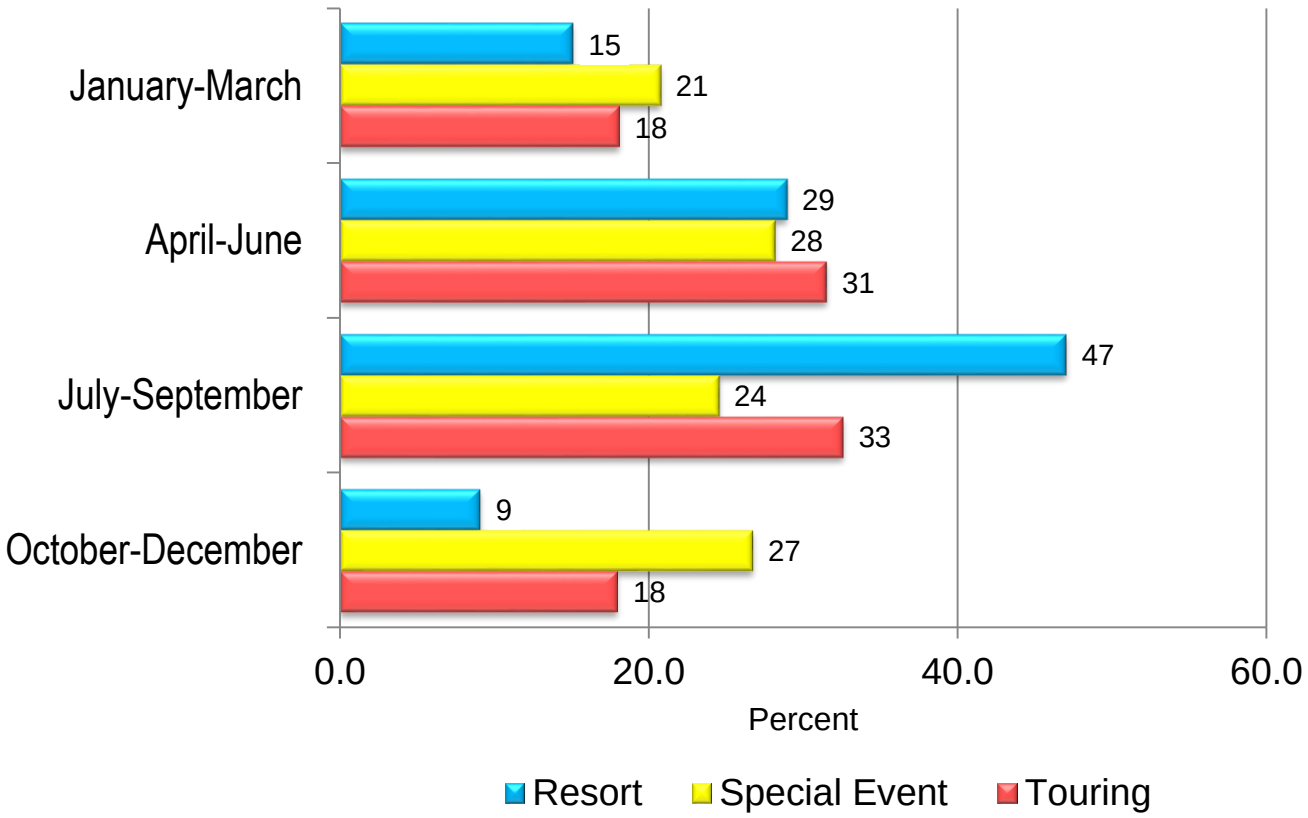
DMA Sources of Business — Touring Trips (Cont'd)

Base: Overnight Touring Trips to Maryland



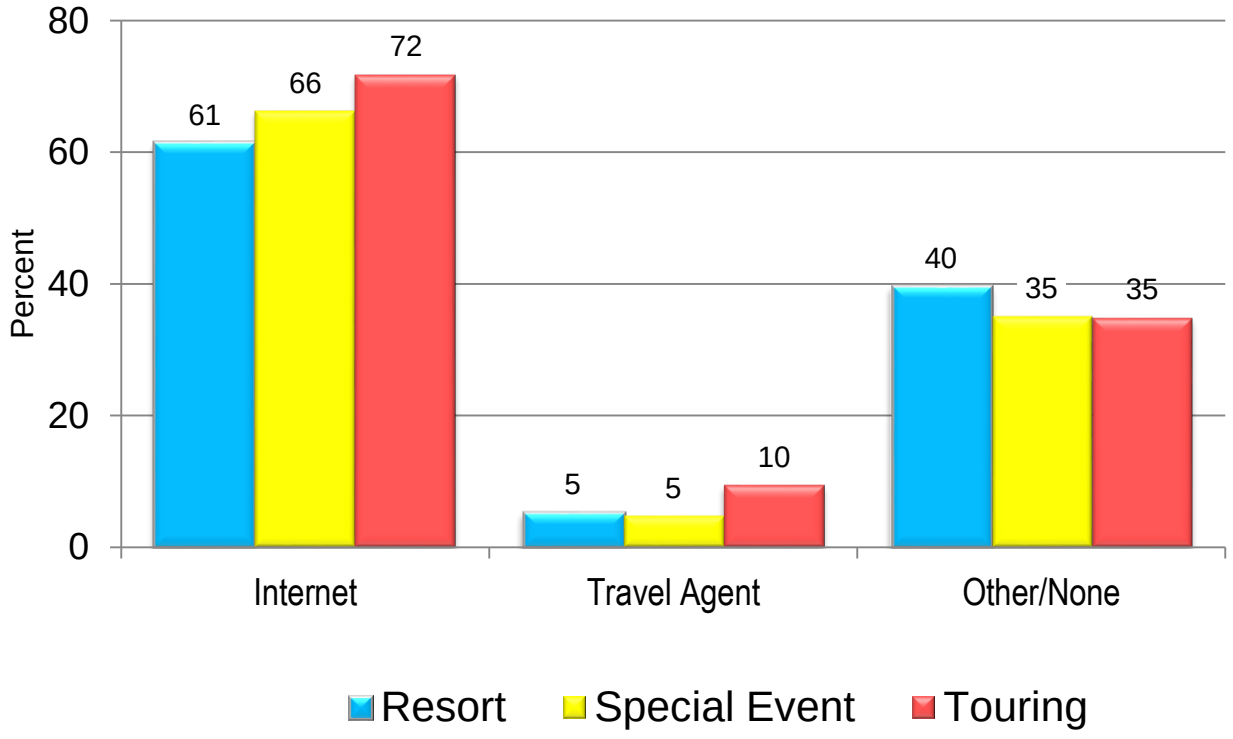
Season of Trip

Base: Overnight Trips to Maryland



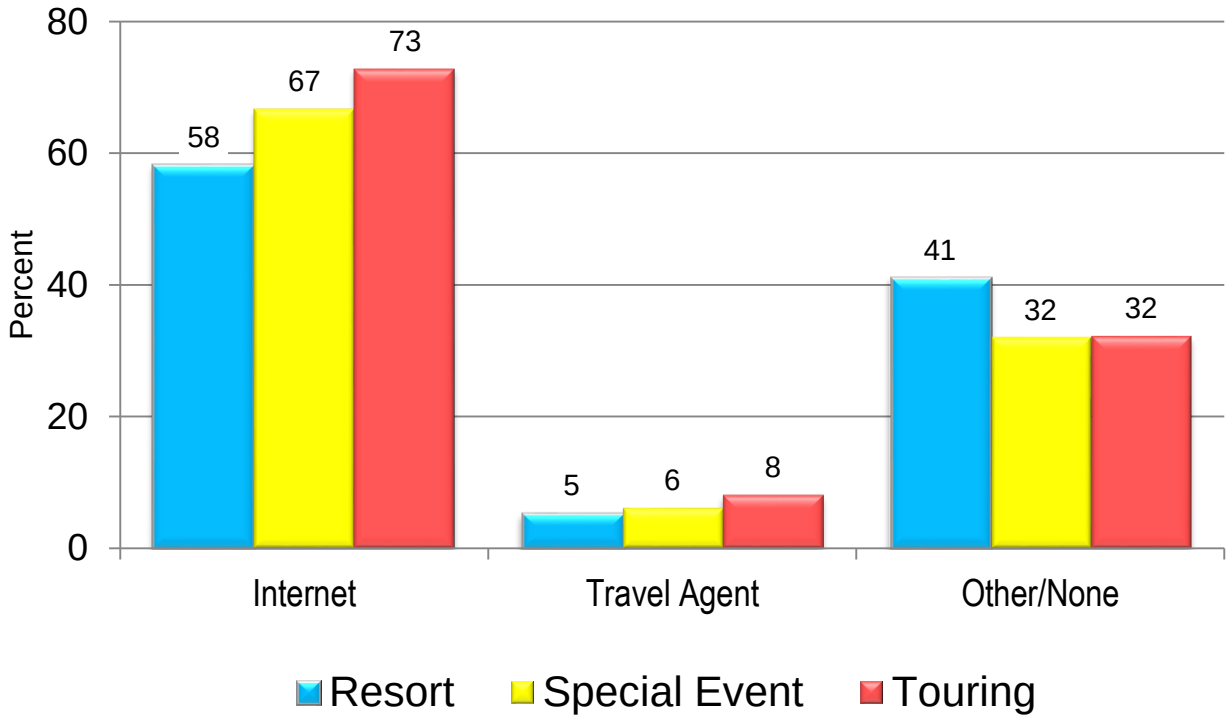
Method of Planning Overnight Trip to Maryland

Base: Overnight Trips to Maryland



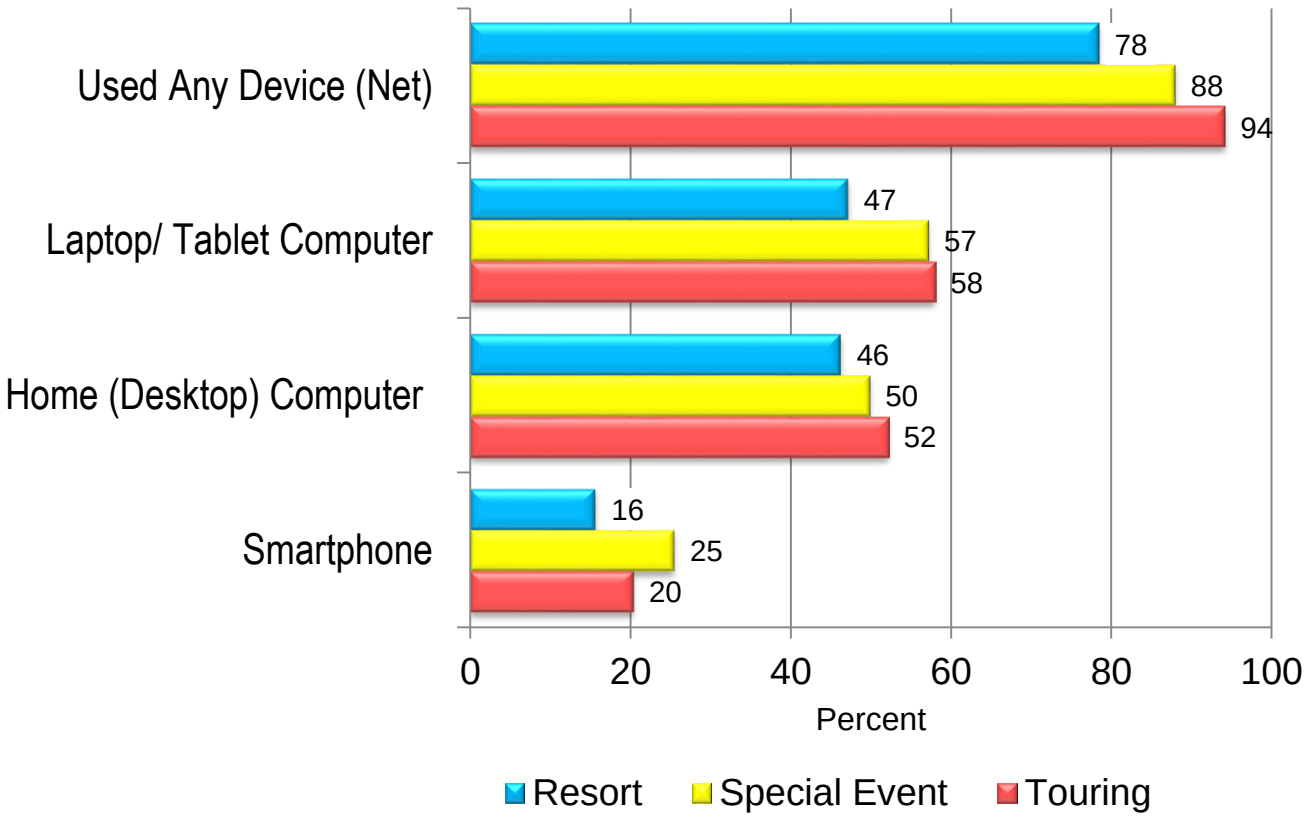
Method of Booking Overnight Trip to Maryland

Base: Overnight Trips to Maryland



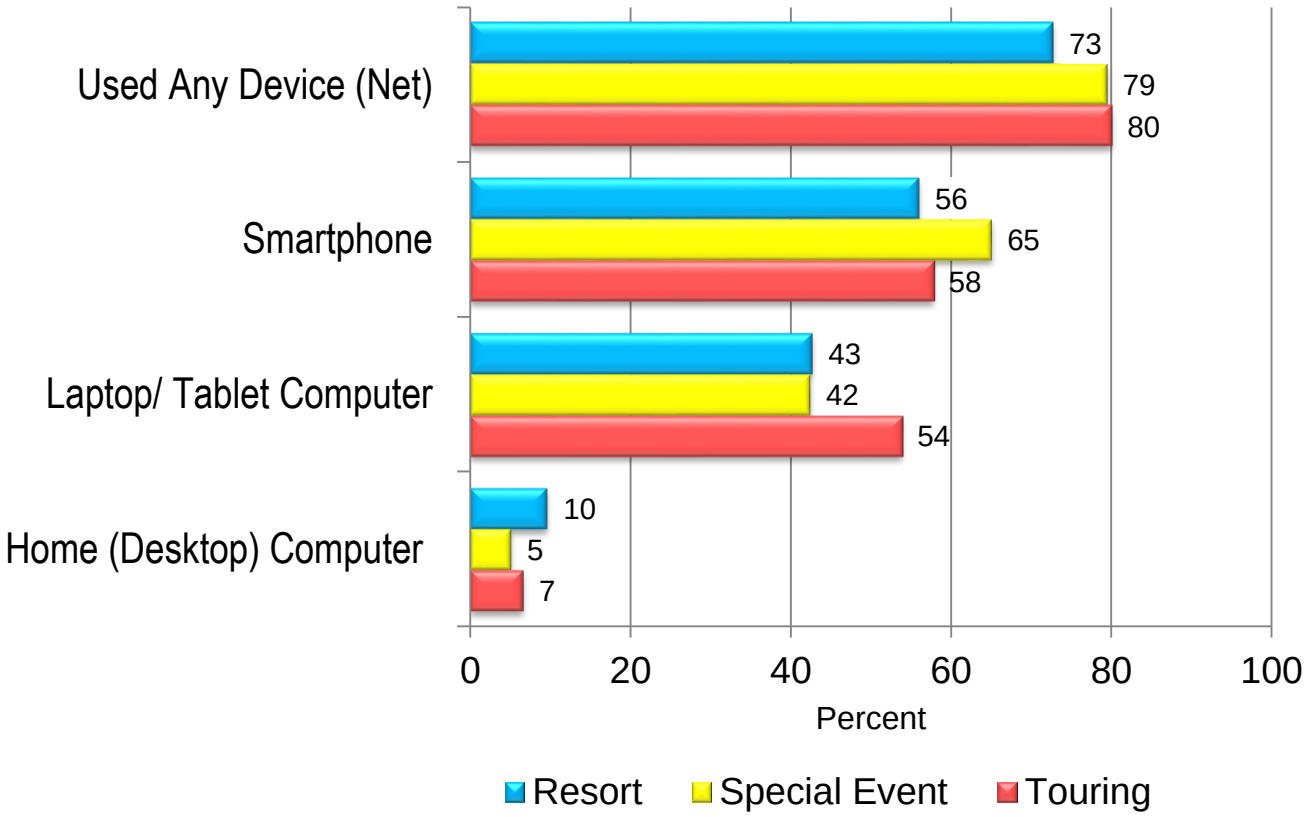
Use of Devices for Trip Planning

Base: Overnight Trips to Maryland



Use of Devices During Trip

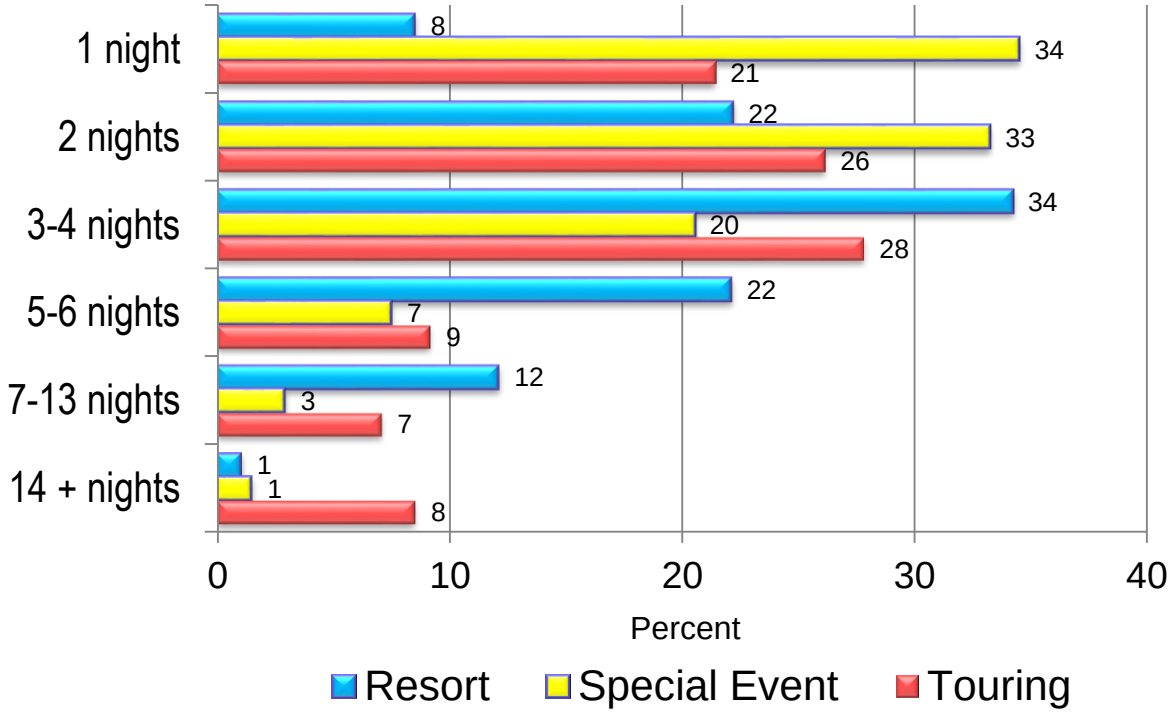
Base: Overnight Trips to Maryland



Total Nights Away

Base: Overnight Trips to Maryland

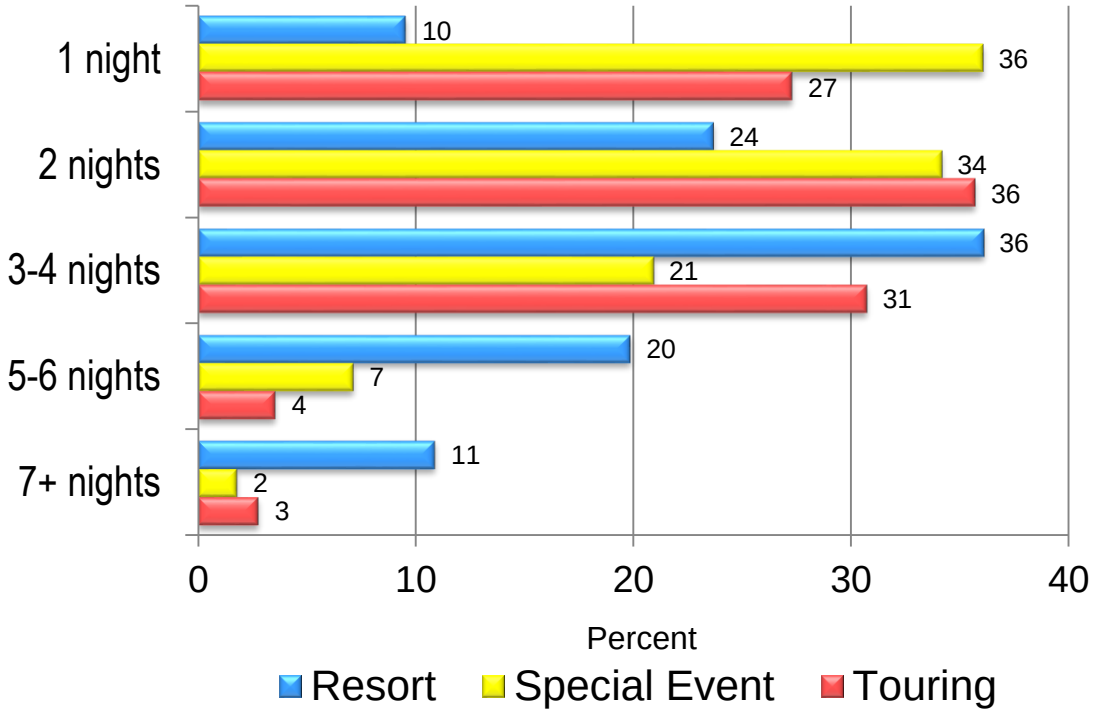
Resort Average 2.5 Nights	Special Event Average 2.3 Nights	Touring Average 4.4 Nights



Number of Nights in Maryland

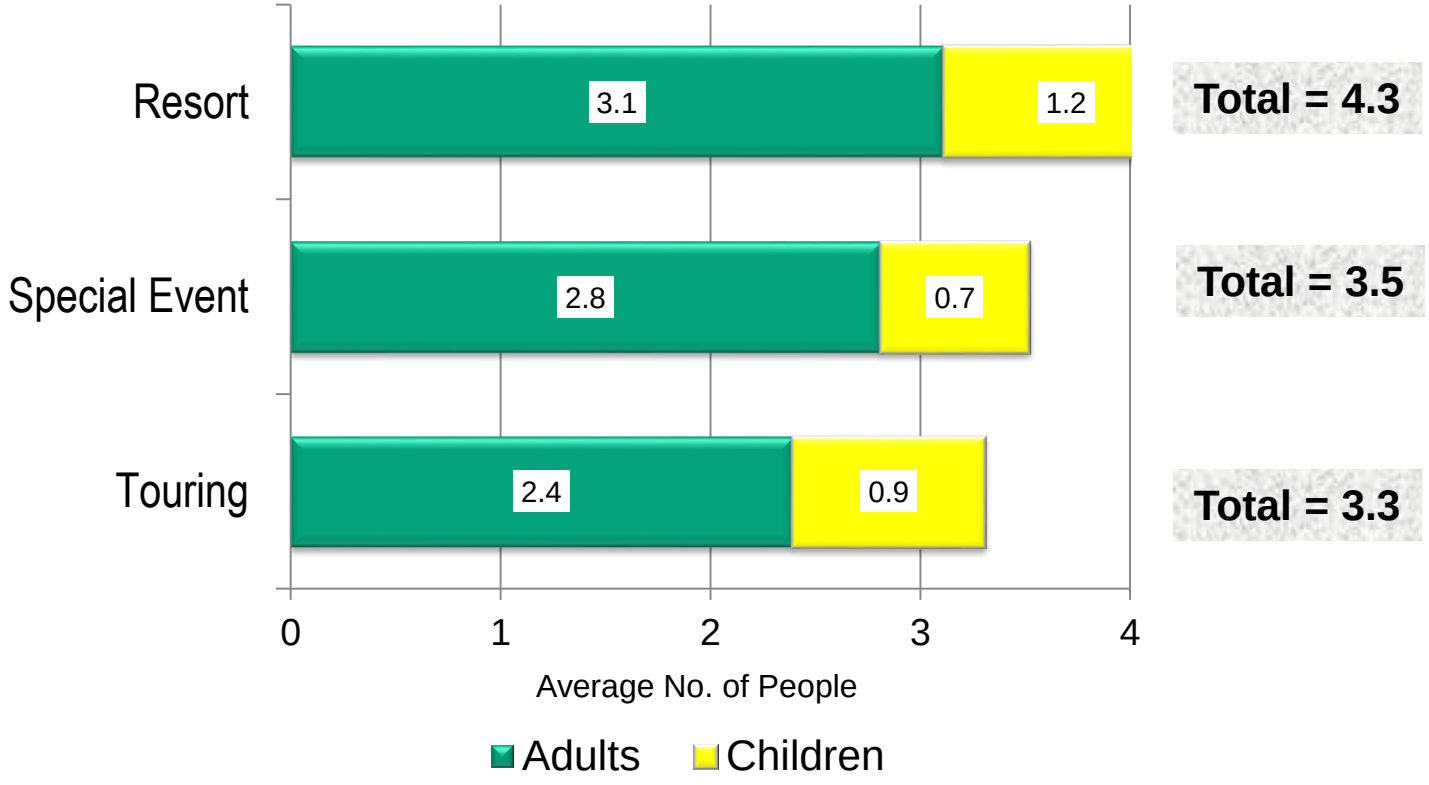
Base: Overnight trips with 1+ nights spent in Maryland

Resort Average 3.7 Nights	Special Event 2.3 Nights	Touring Average 2.6 Nights



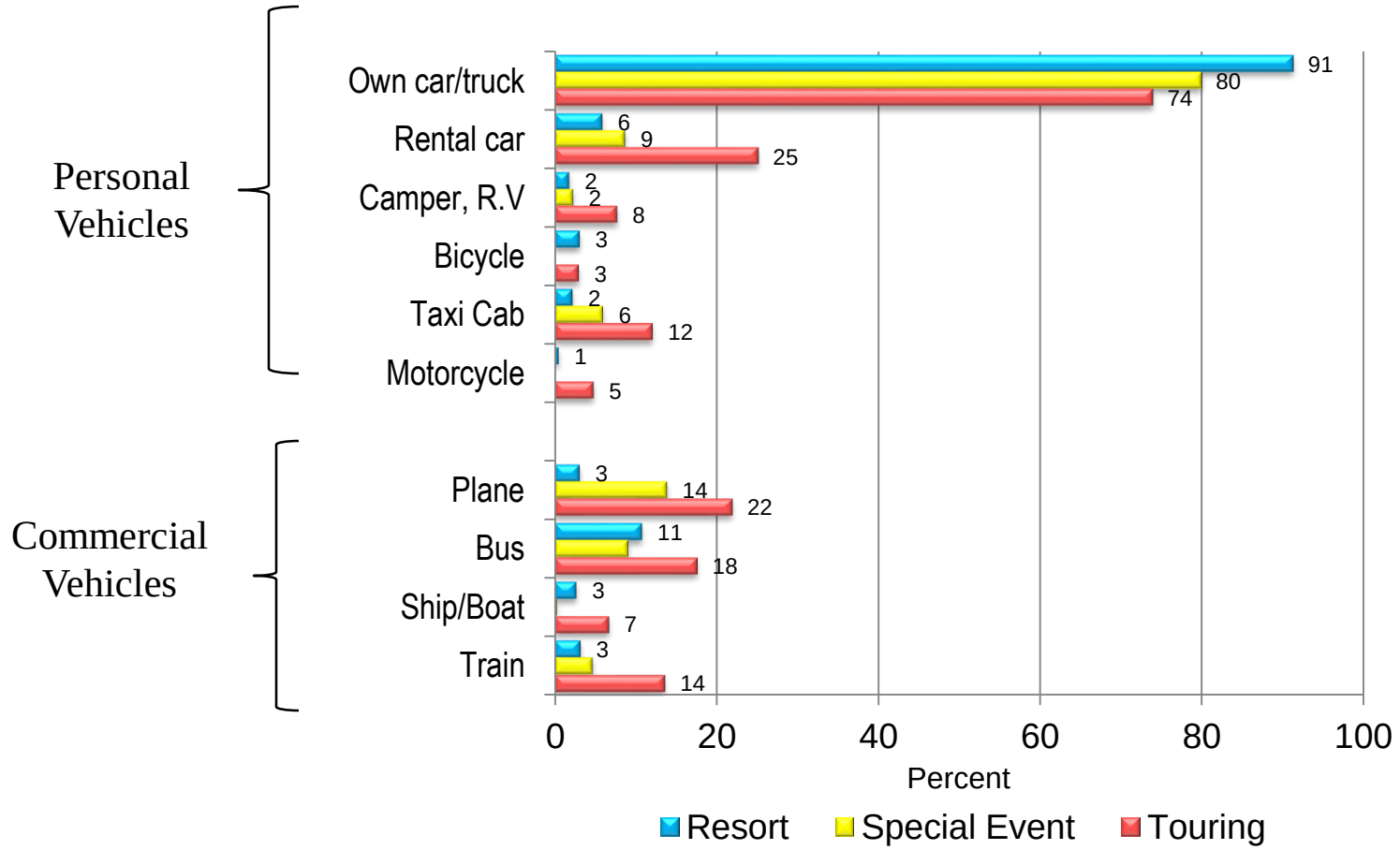
Size of Travel Party

Base: Overnight Trips to Maryland



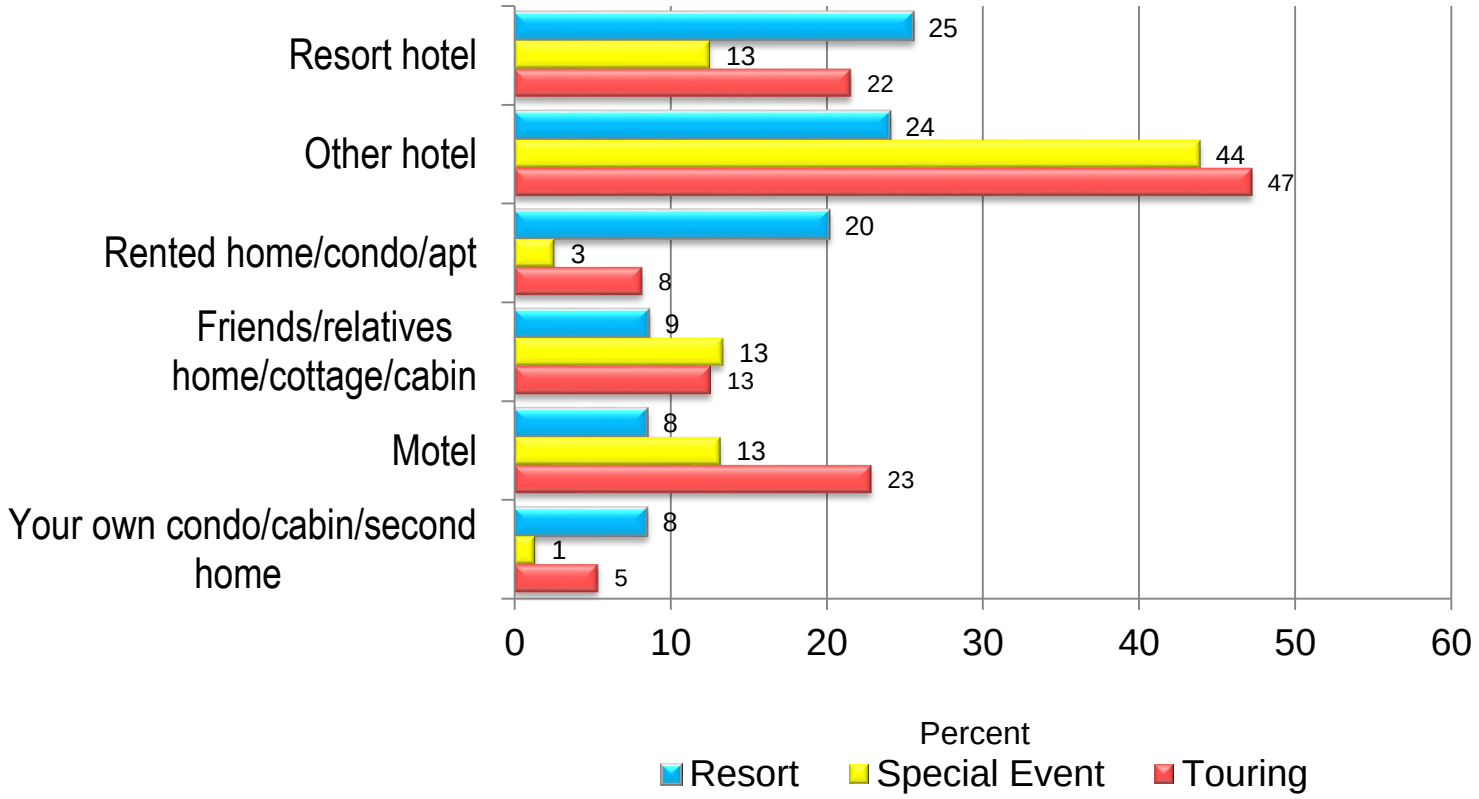
Transportation

Base: Overnight Trips to Maryland



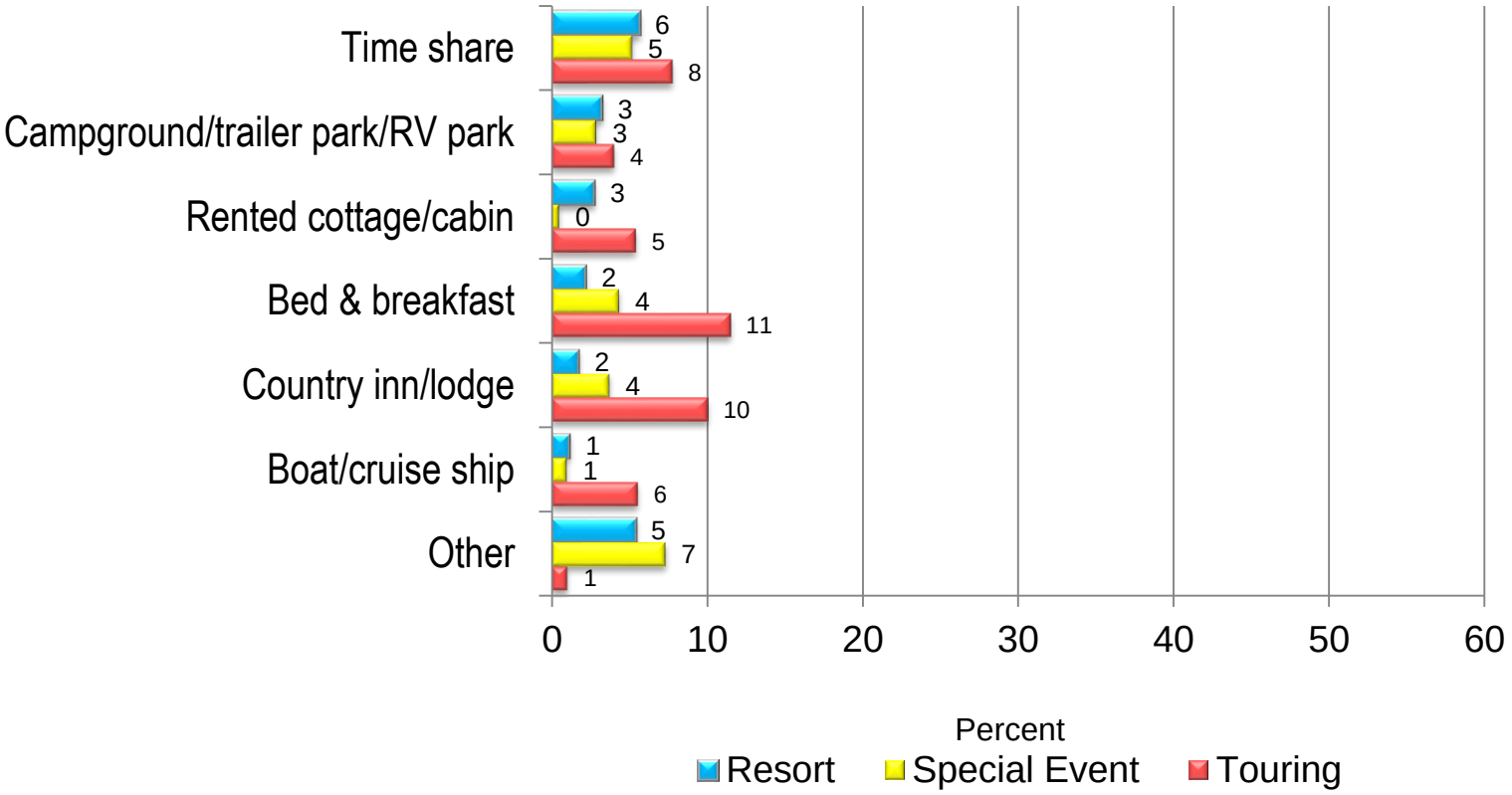
Accommodations on Trip

Base: Overnight Trips to Maryland



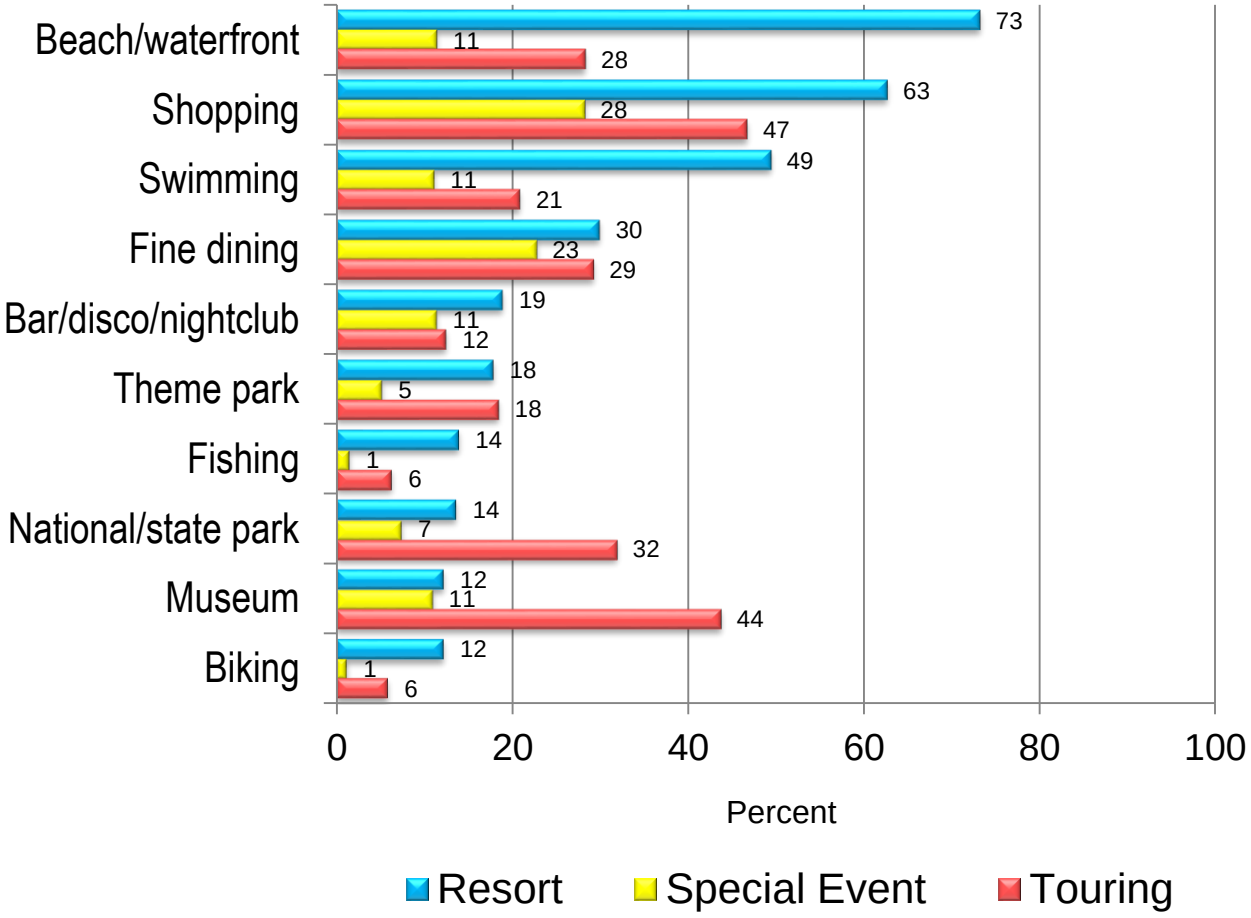
Accommodations on Trip (Cont'd)

Base: Overnight Trips to Maryland



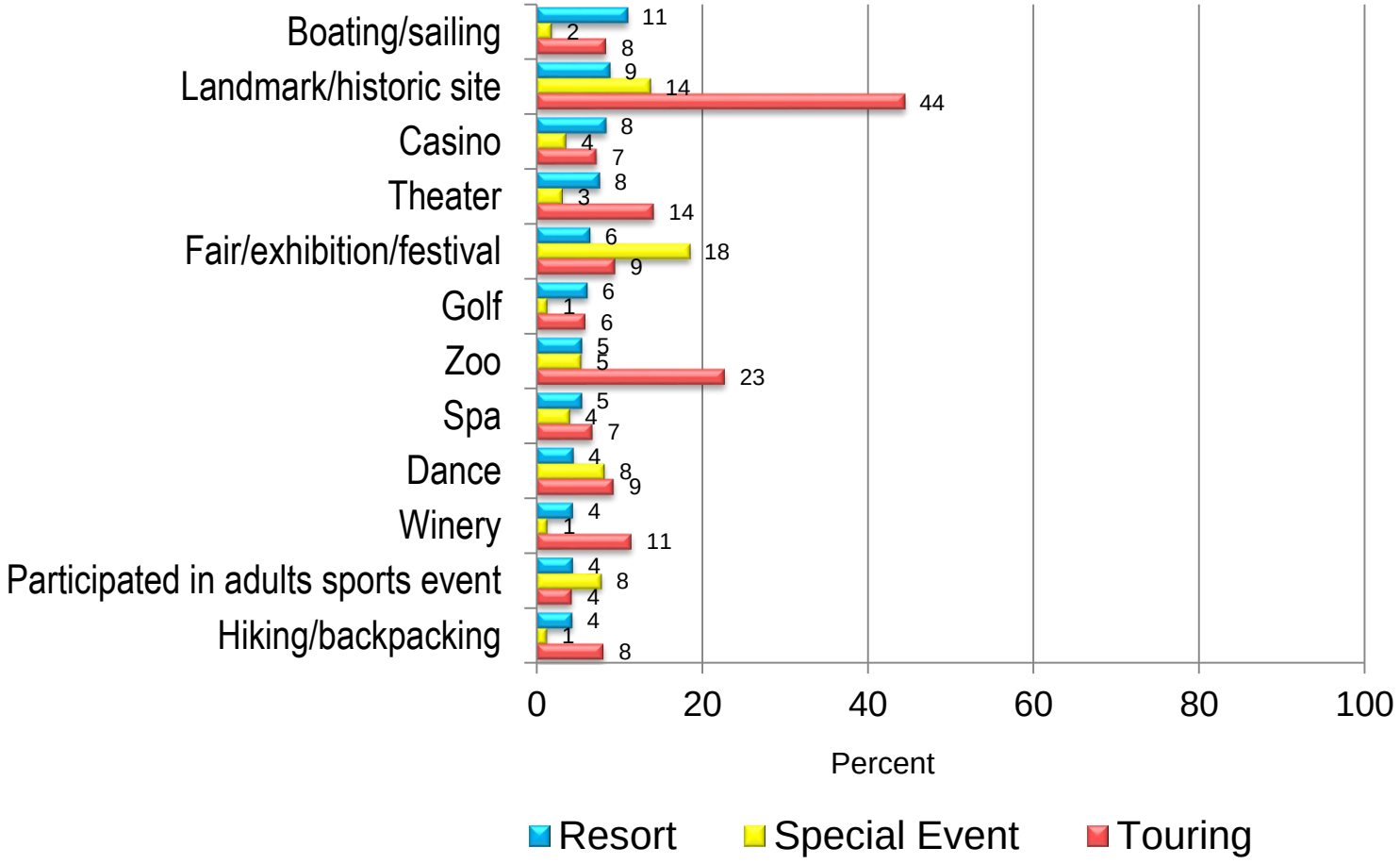
Activities and Experiences

Base: Overnight Trips to Maryland



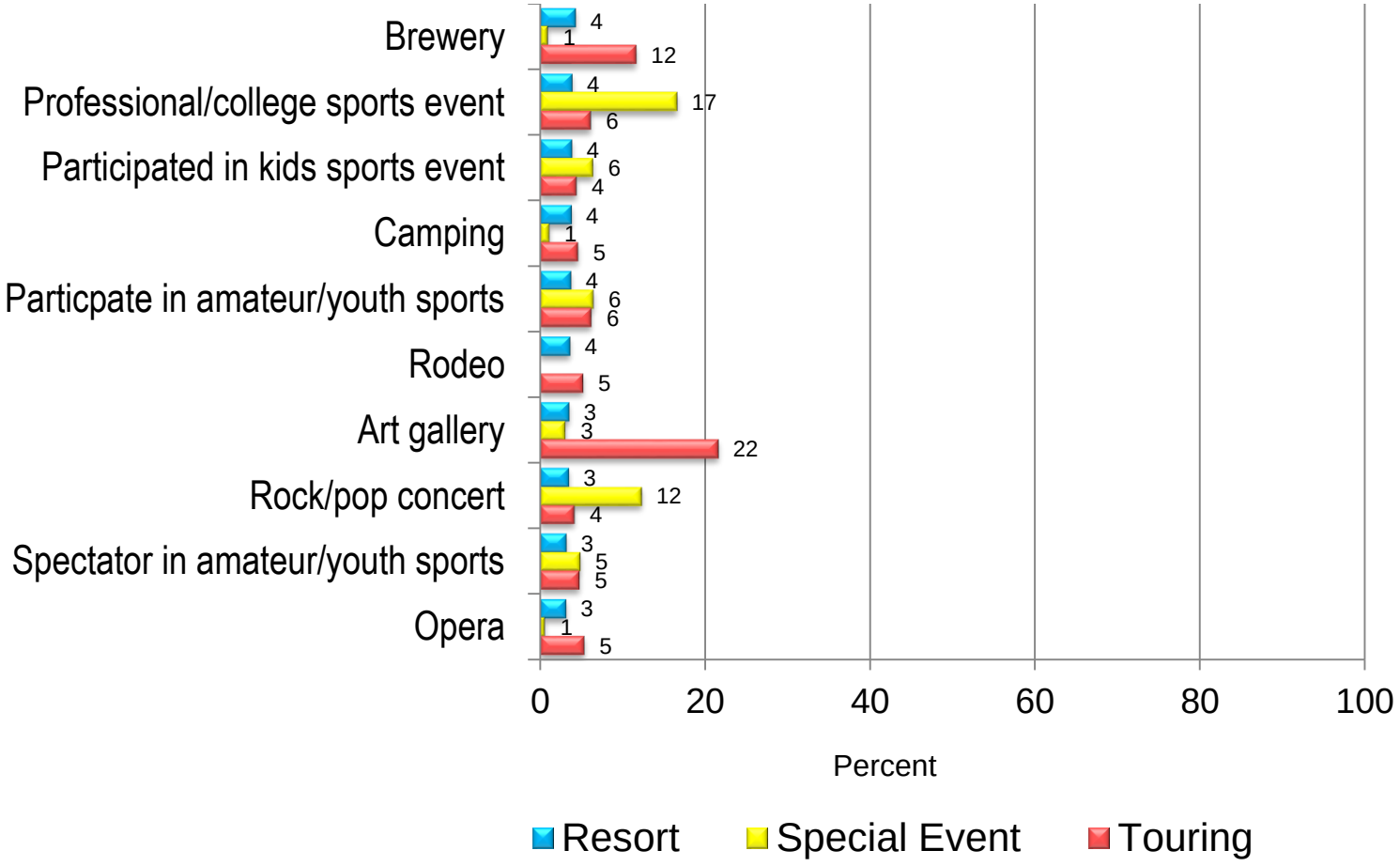
Activities and Experiences (Cont'd)

Base: Overnight Trips to Maryland



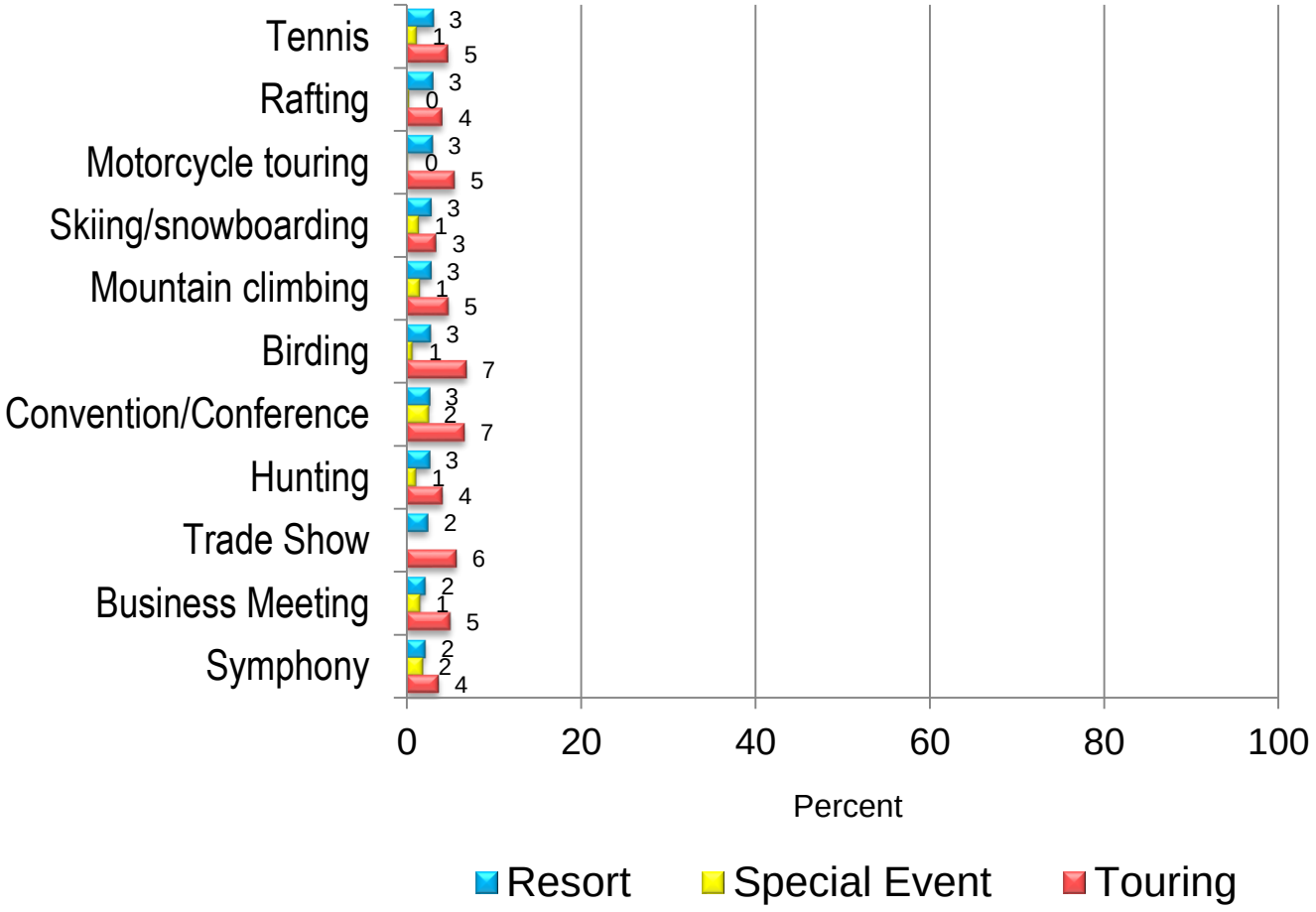
Activities and Experiences (Cont'd)

Base: Overnight Trips to Maryland



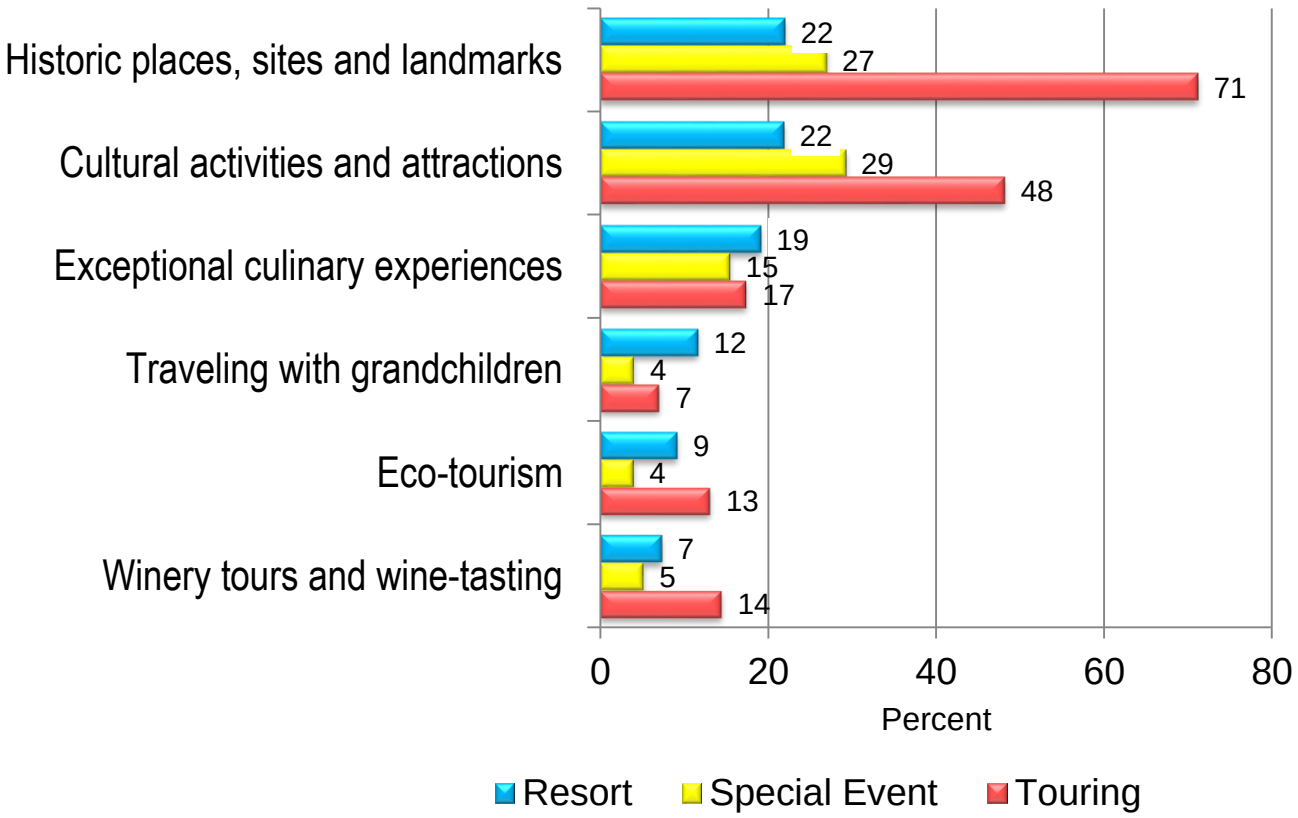
Activities and Experiences (Cont'd)

Base: Overnight Trips to Maryland



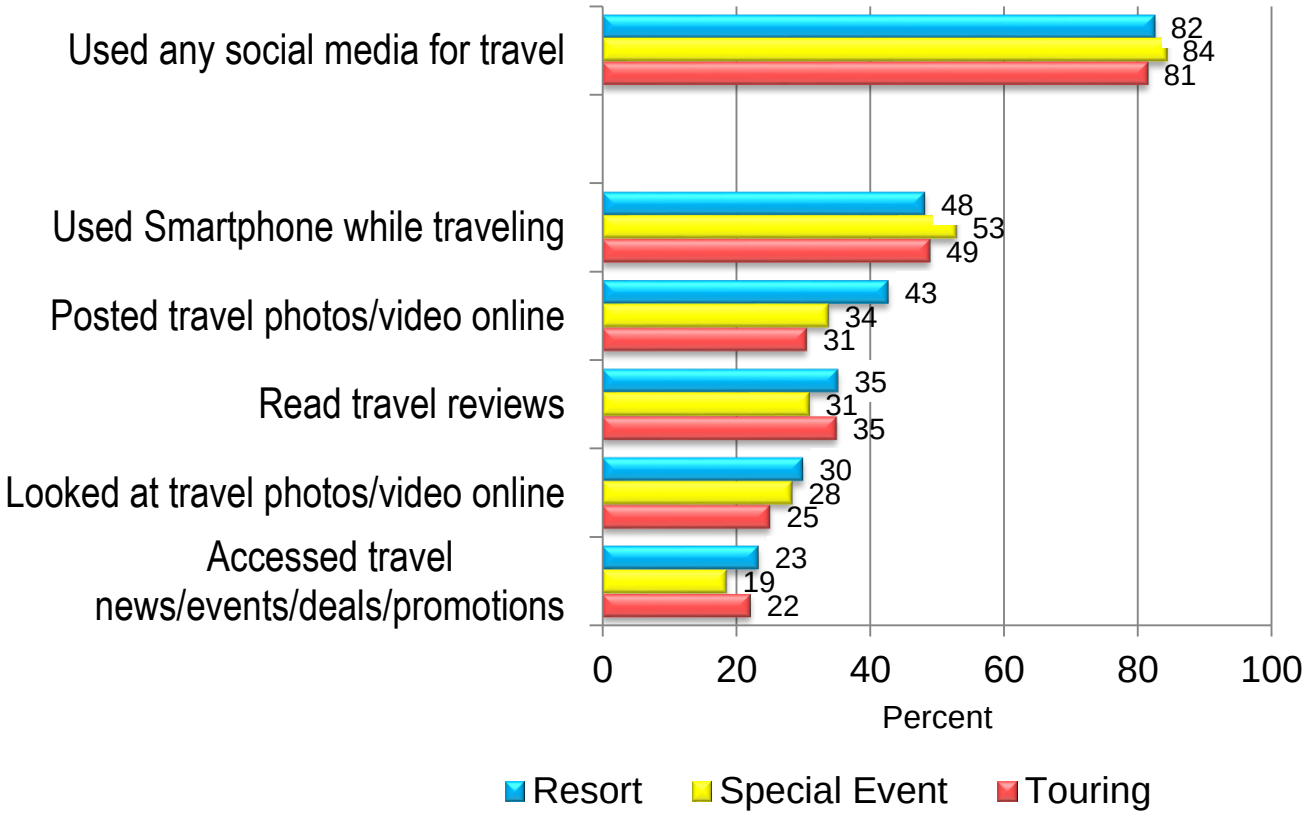
Activities of Special Interest

Base: Overnight Trips to Maryland



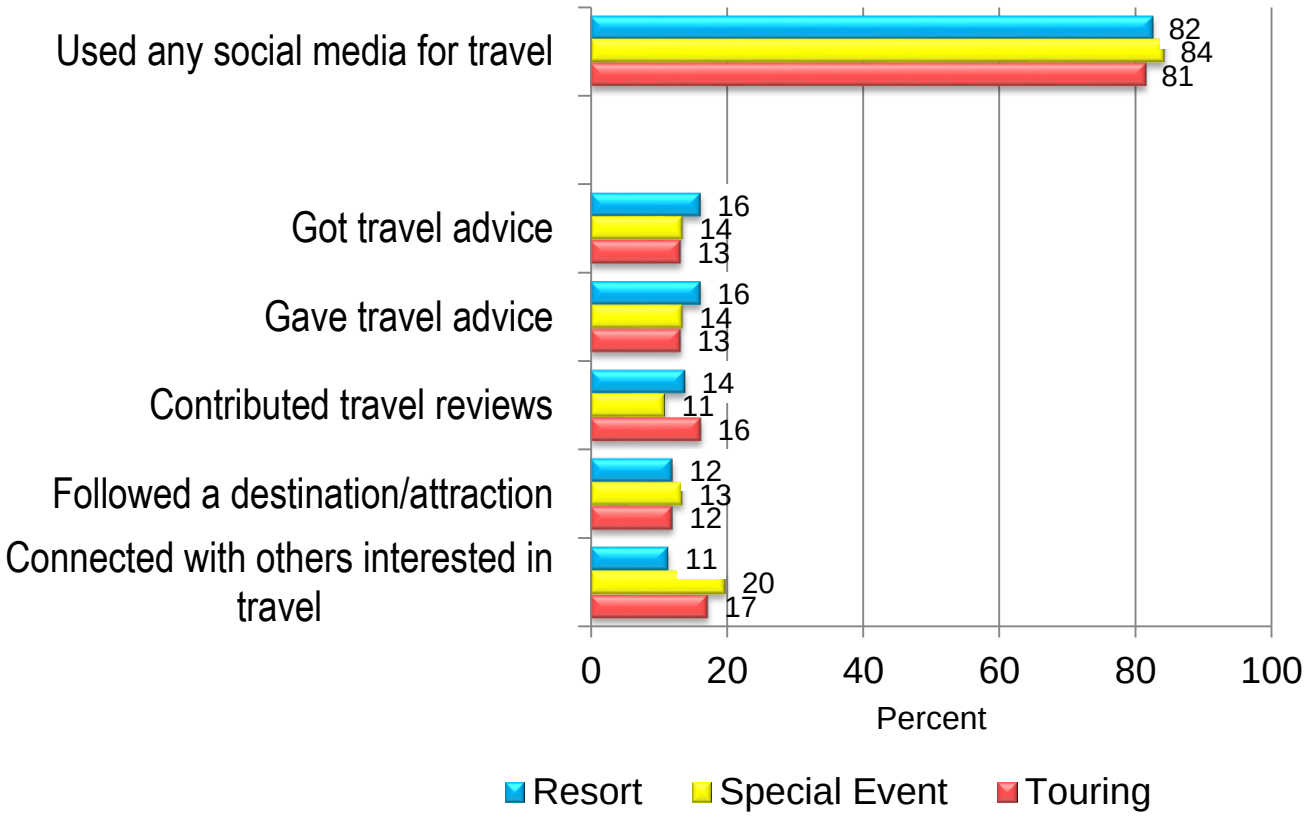
Online Social Media Use by Travelers

Base: Overnight Trips to Maryland



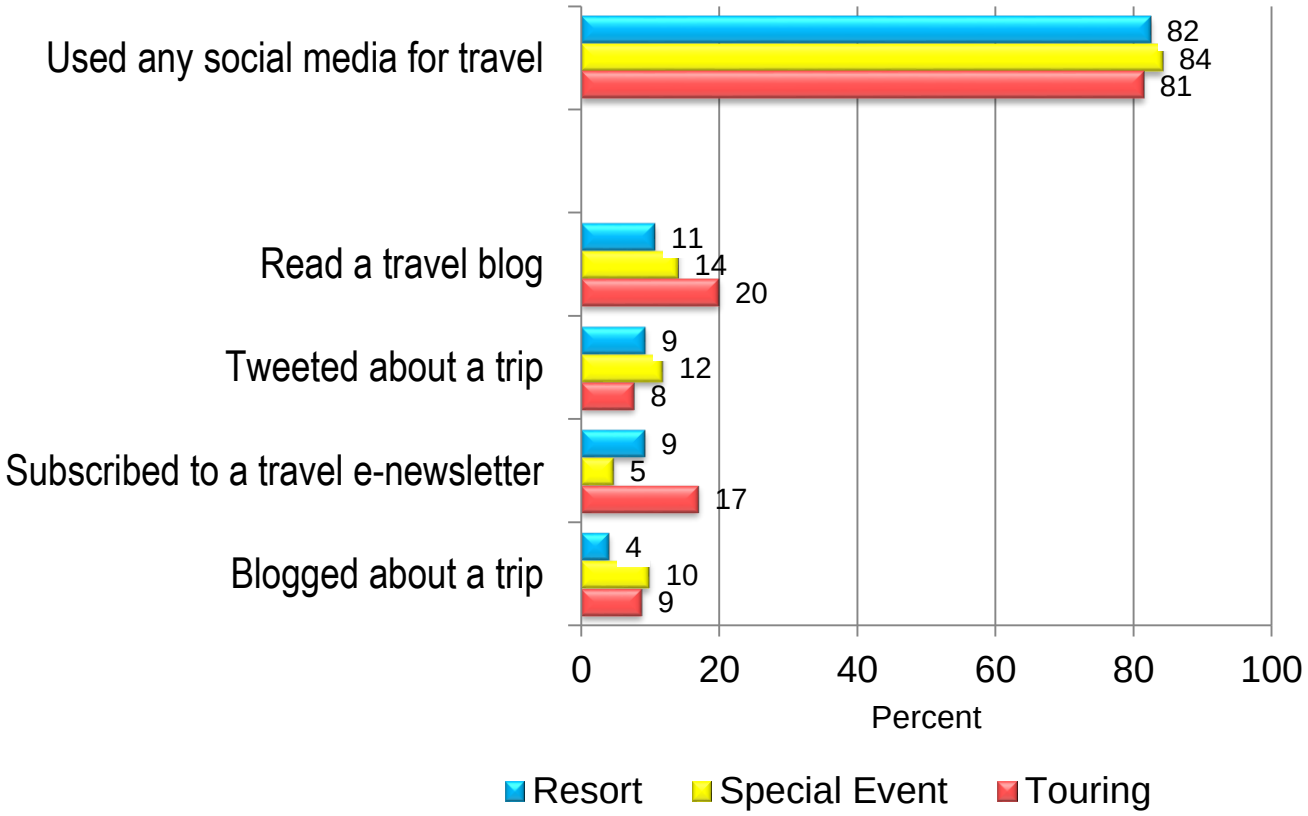
Online Social Media Use by Travelers (Cont'd)

Base: Overnight Trips to Maryland



Online Social Media Use by Travelers (Cont'd)

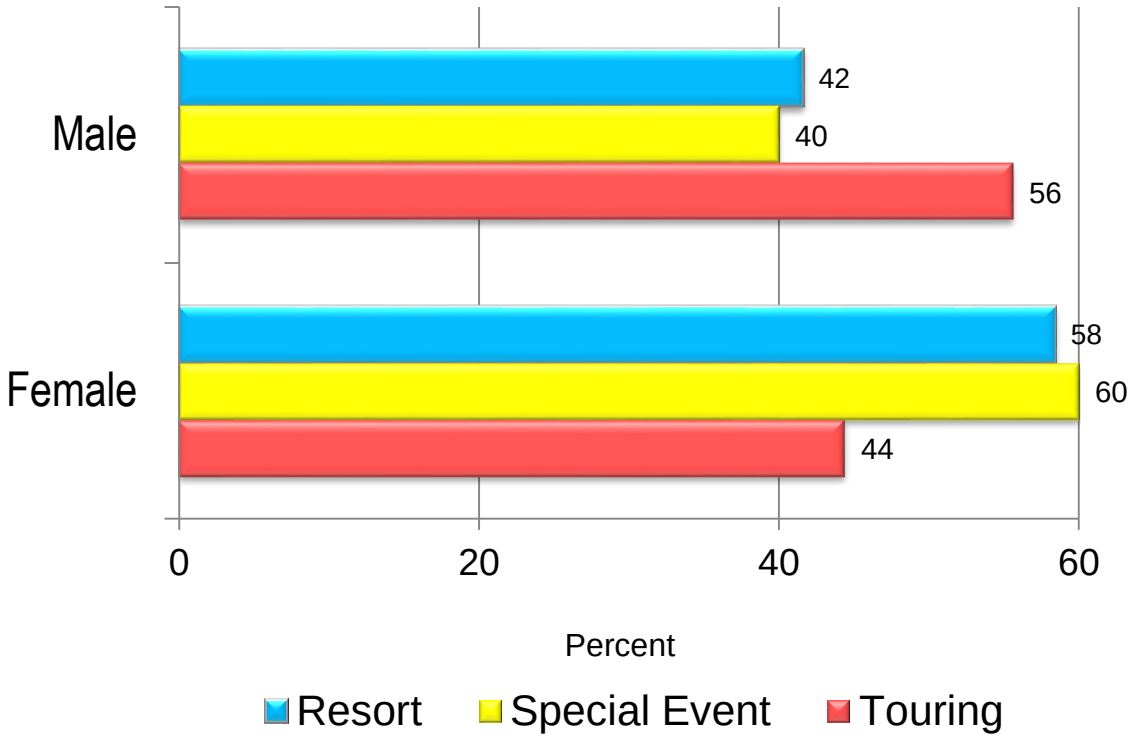
Base: Overnight Trips to Maryland



Demographic Profile of Resort, Special Event and Touring Main Purpose Trips

Gender

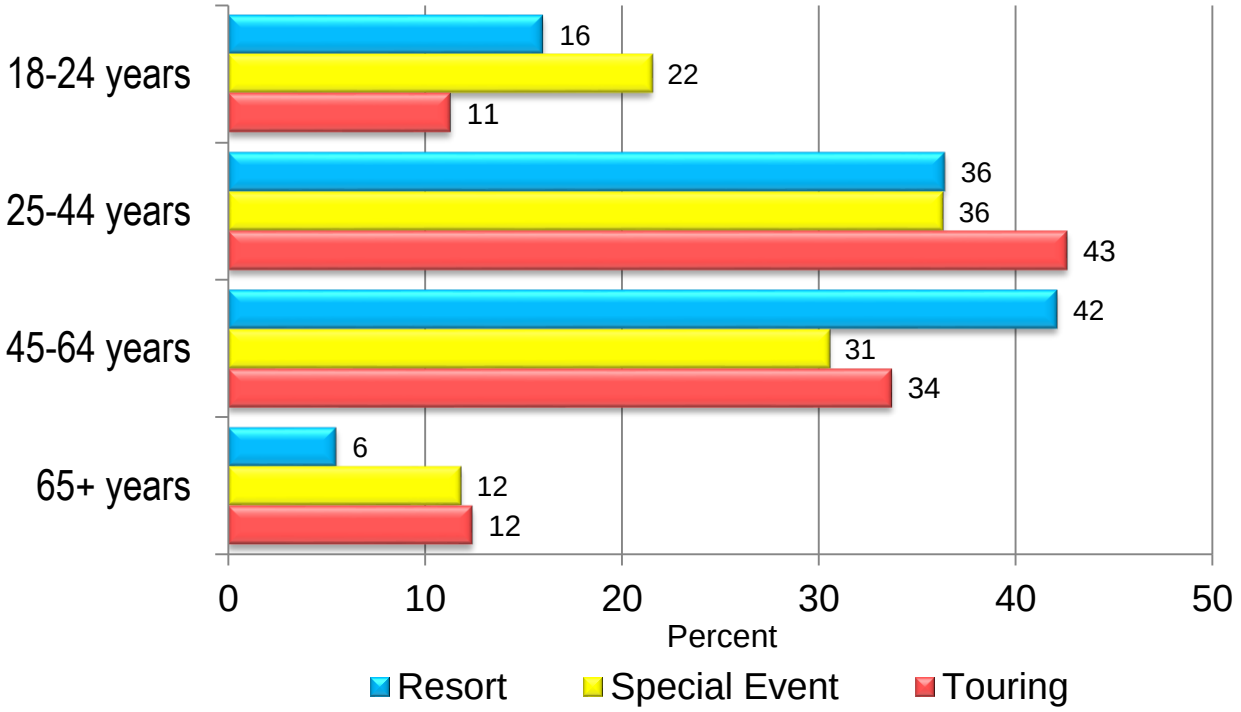
Base: Overnight Trips to Maryland



Age

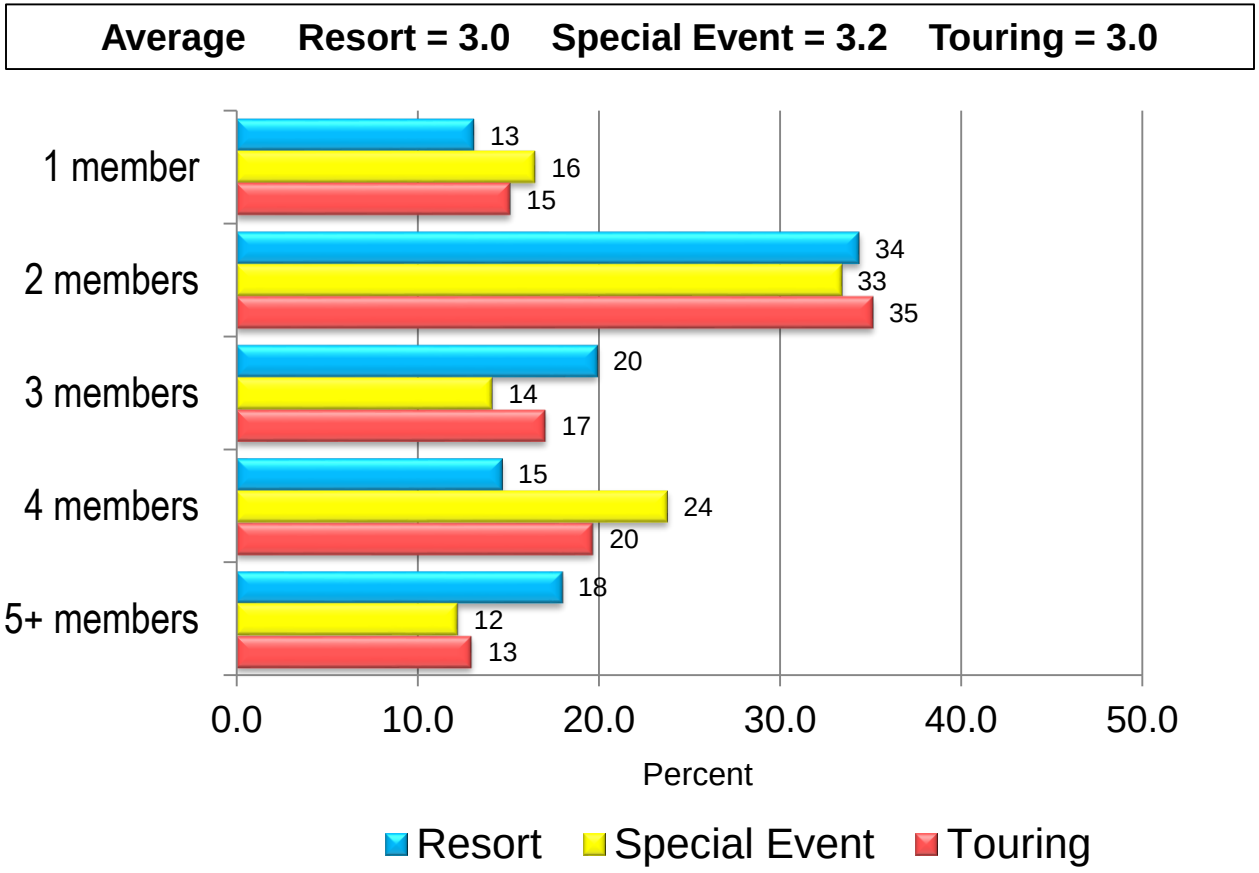
Base: Overnight Trips to Maryland

	Resort	Special Event	Touring
Average Age	**42.7**	**42.3**	**43.9**



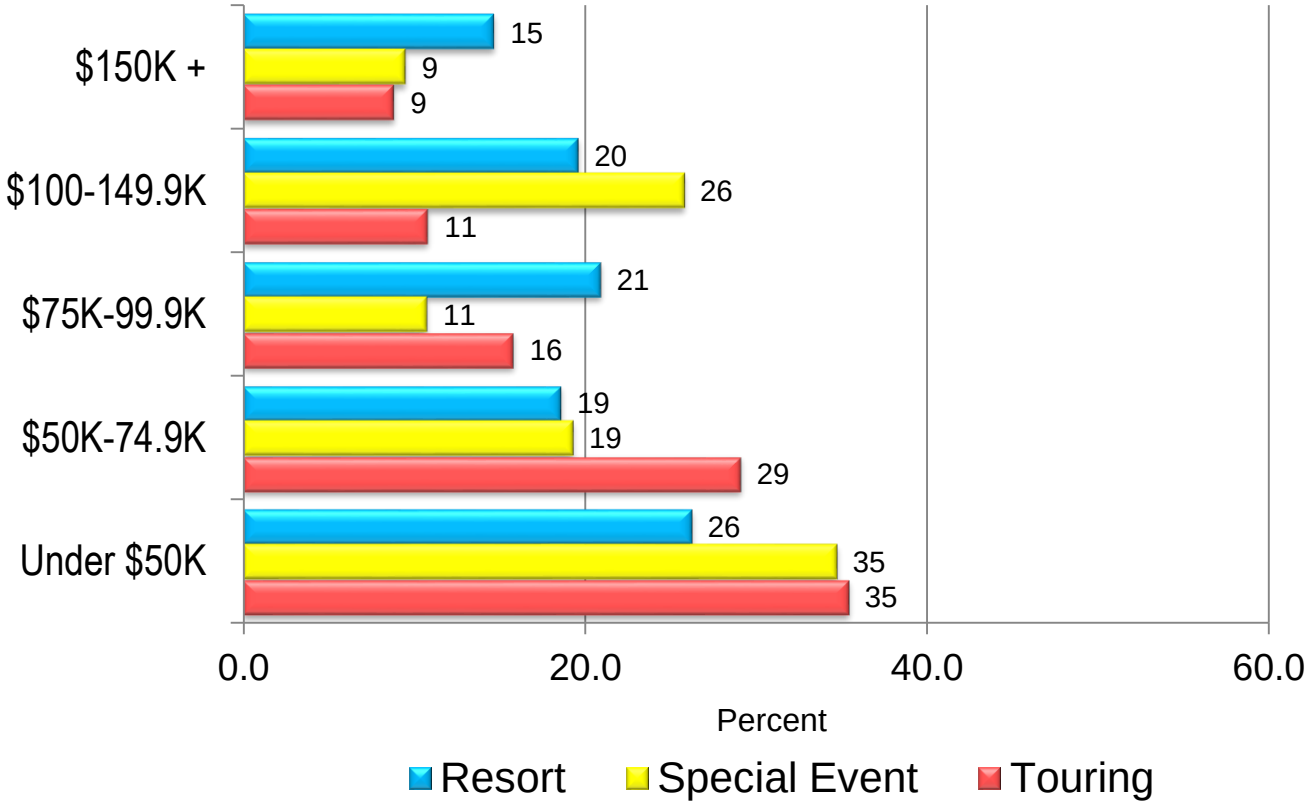
Household Size

Base: Overnight Trips to Maryland



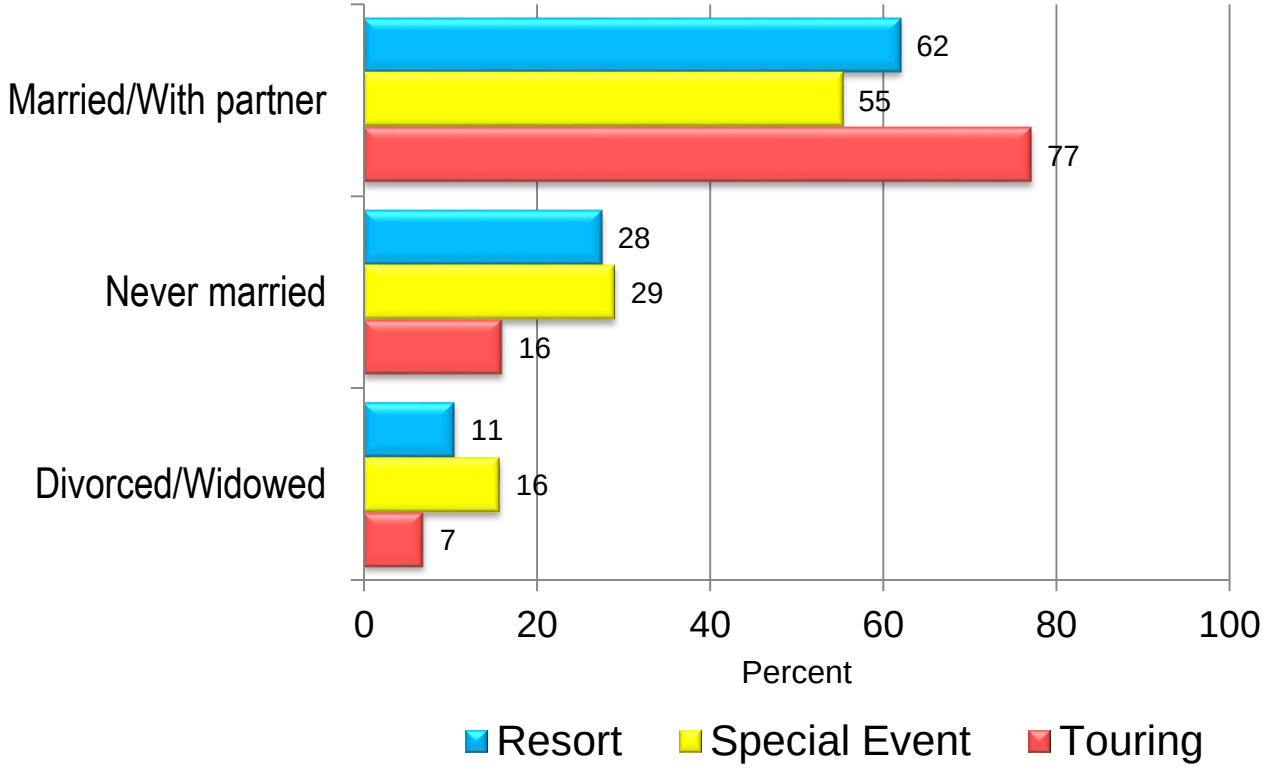
Income

Base: Overnight Trips to Maryland



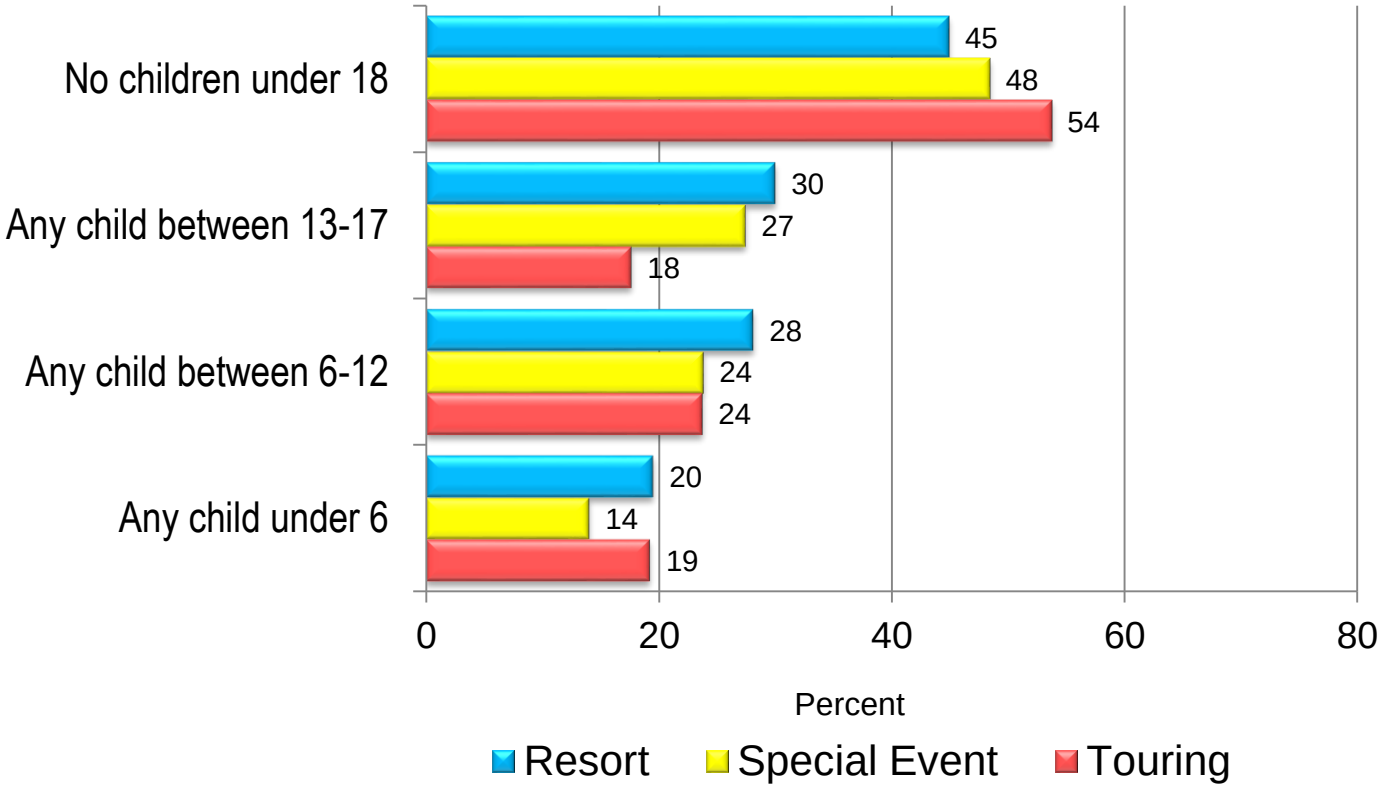
Marital Status

Base: Overnight Trips to Maryland



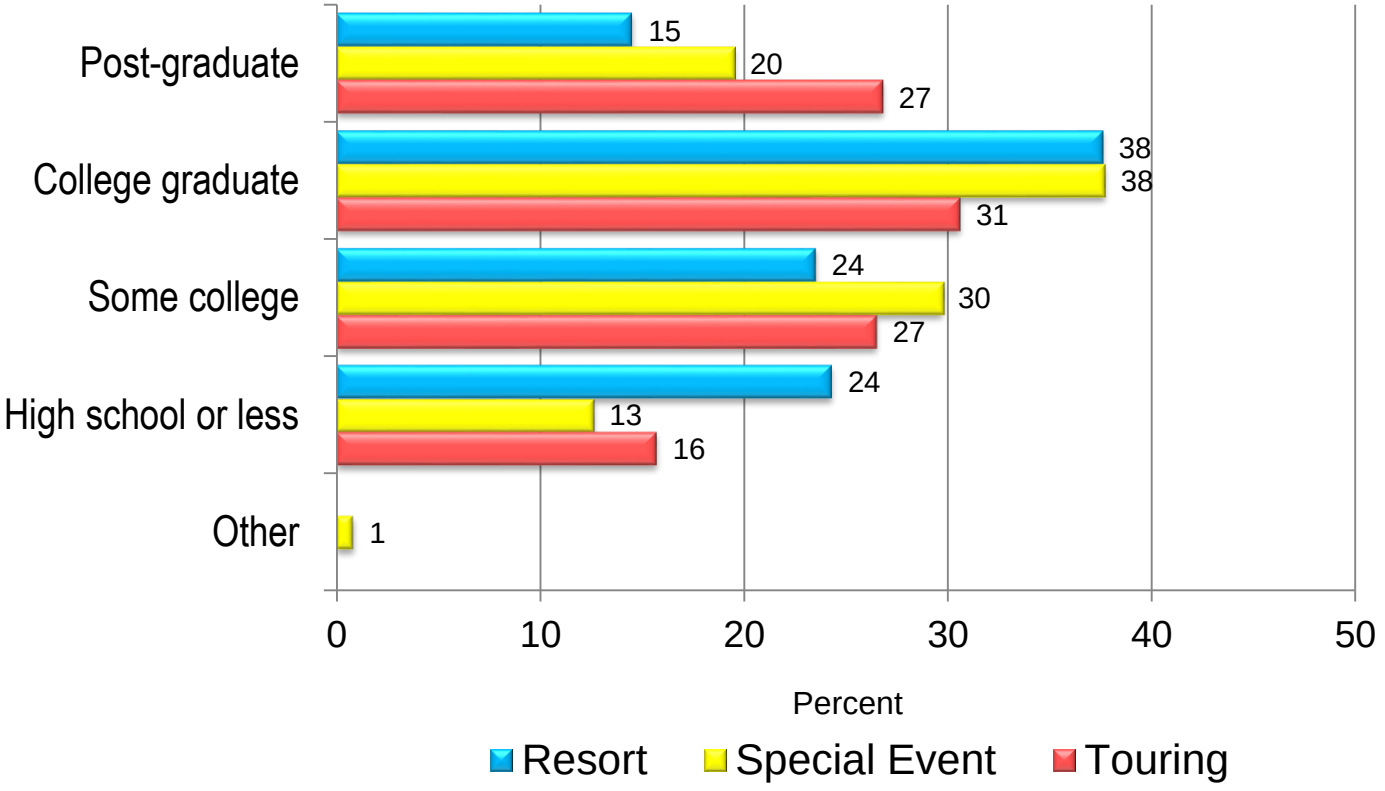
Children in Household

Base: Overnight Trips to Maryland



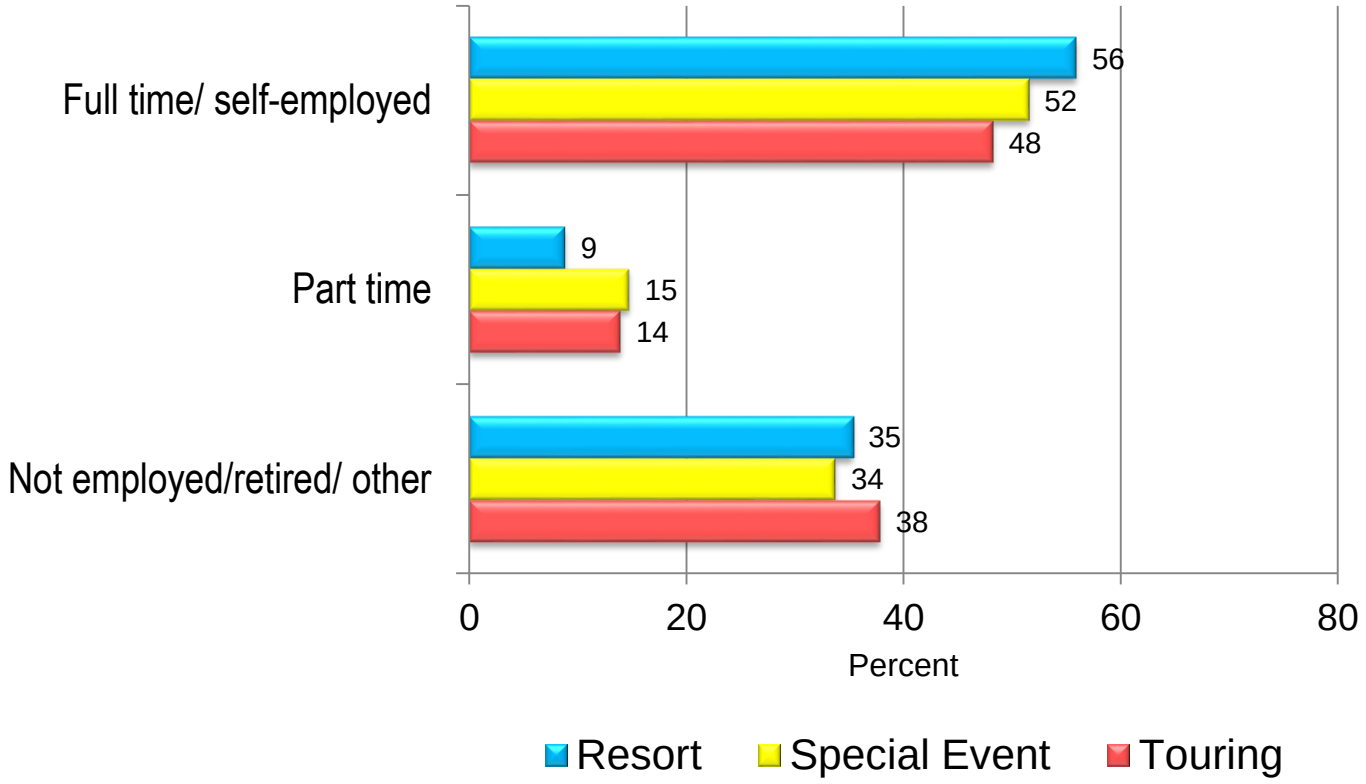
Education

Base: Overnight Trips to Maryland



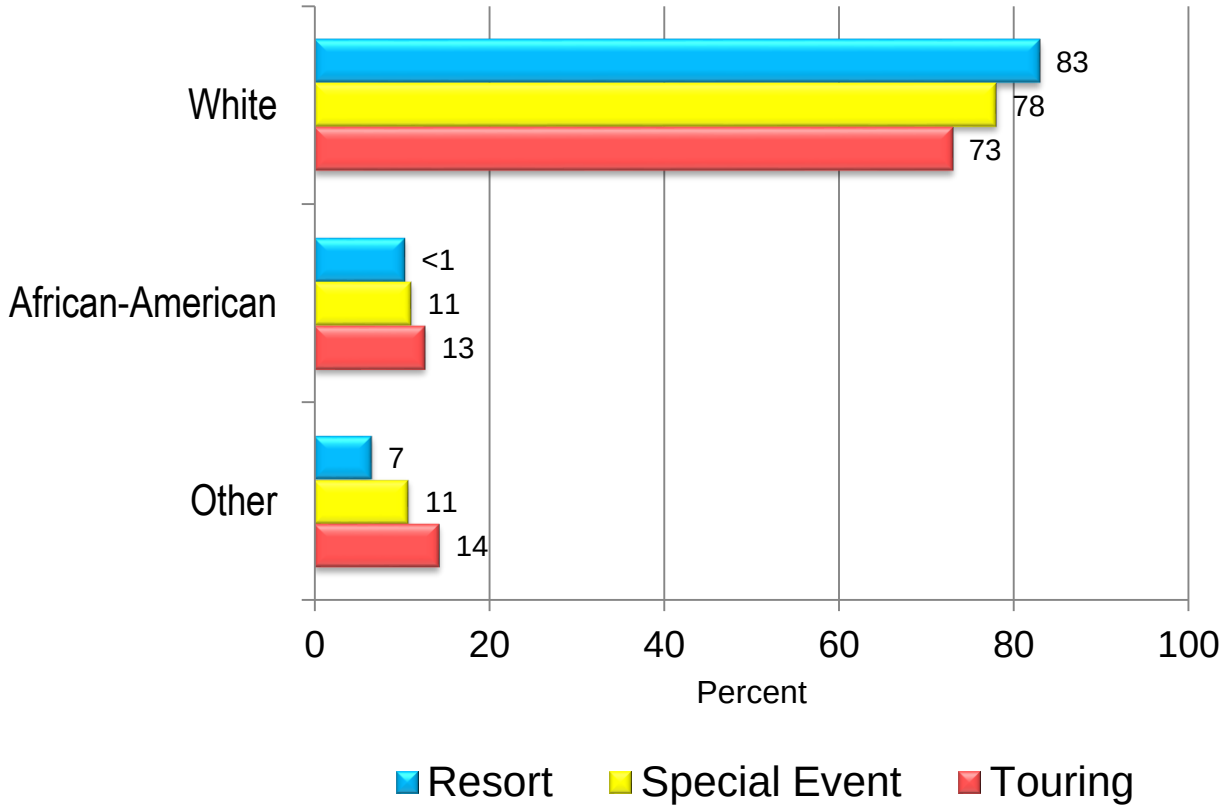
Employment

Base: Overnight Trips to Maryland



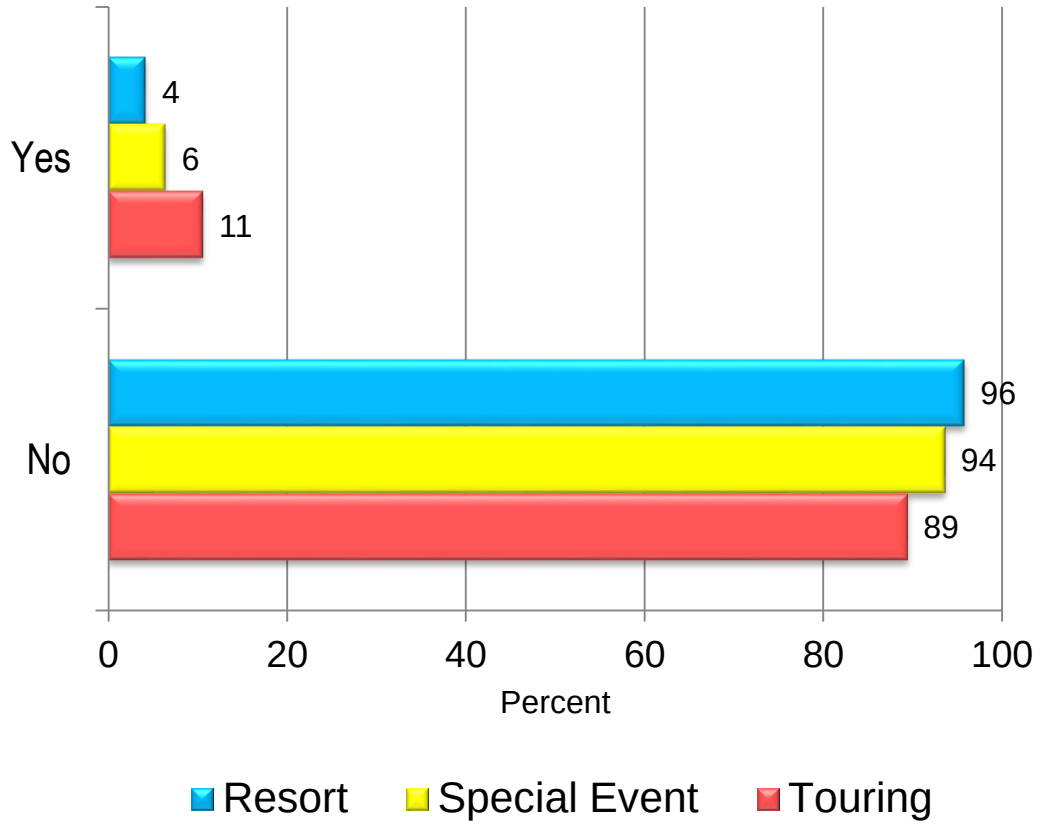
Race

Base: Overnight Trips to Maryland



Hispanic Background

Base: Overnight Trips to Maryland

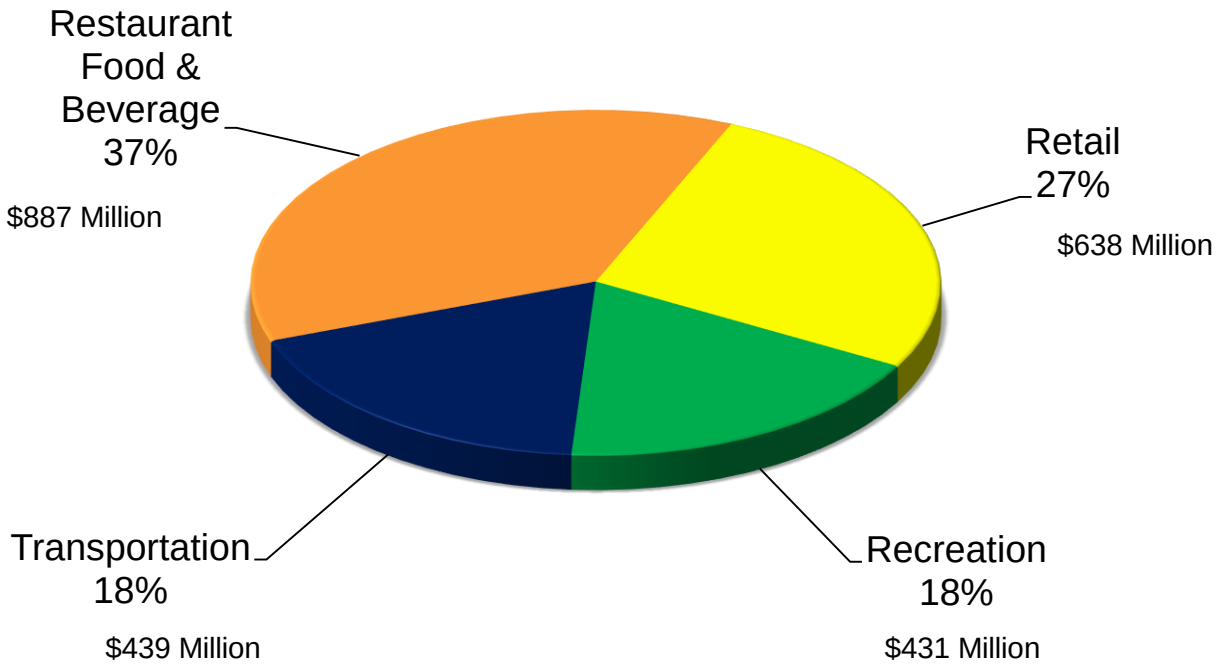


Day Trip Detail

Day Trip Expenditures

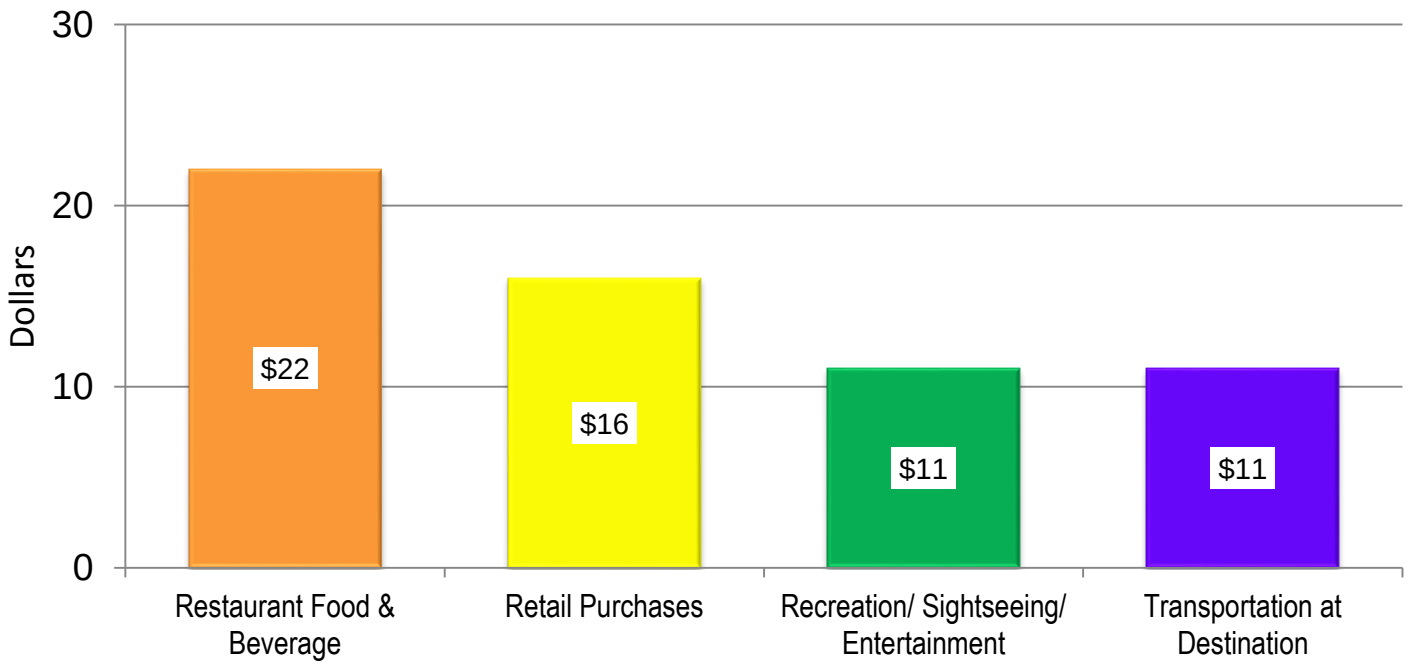
Total Travel Spending by Sector: Day Trips

Total Spending = $2.4 Billion



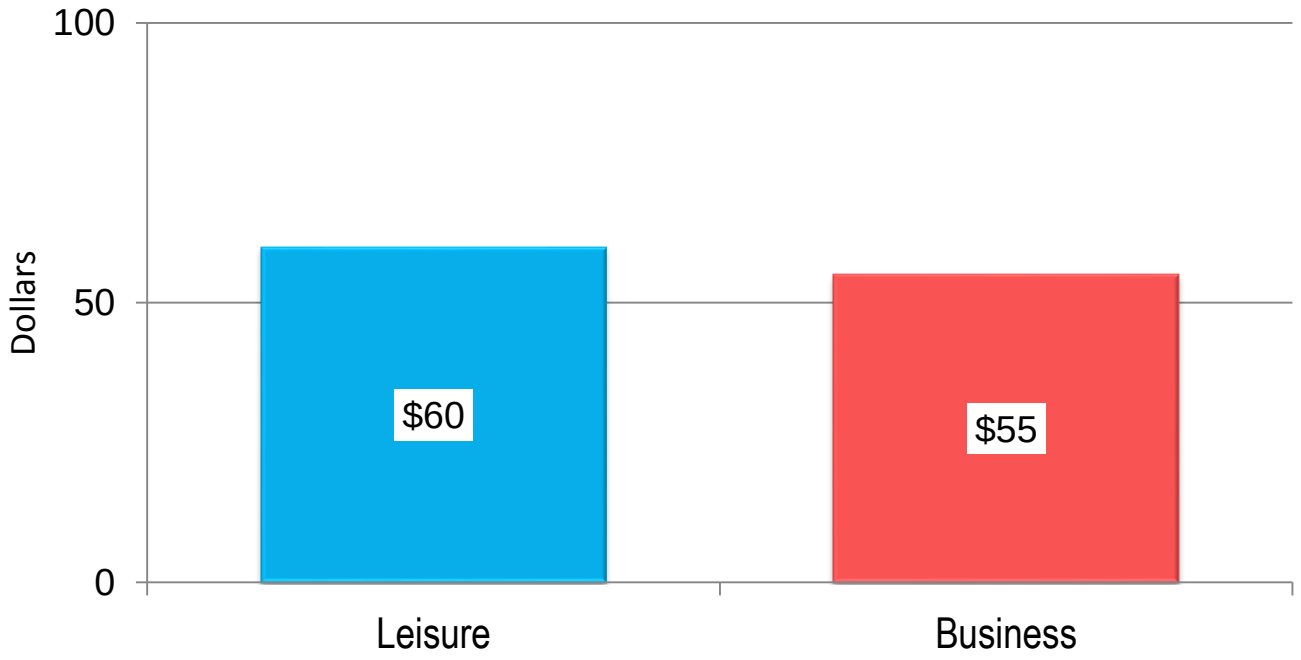
Average Per Person Expenditures on Day Trips — By Sector

Base: Total Day Person-Trips to Maryland



Average Per Person Expenditures on Day Trip — by Trip Purpose

Base: Total Day Person-Trips to Maryland

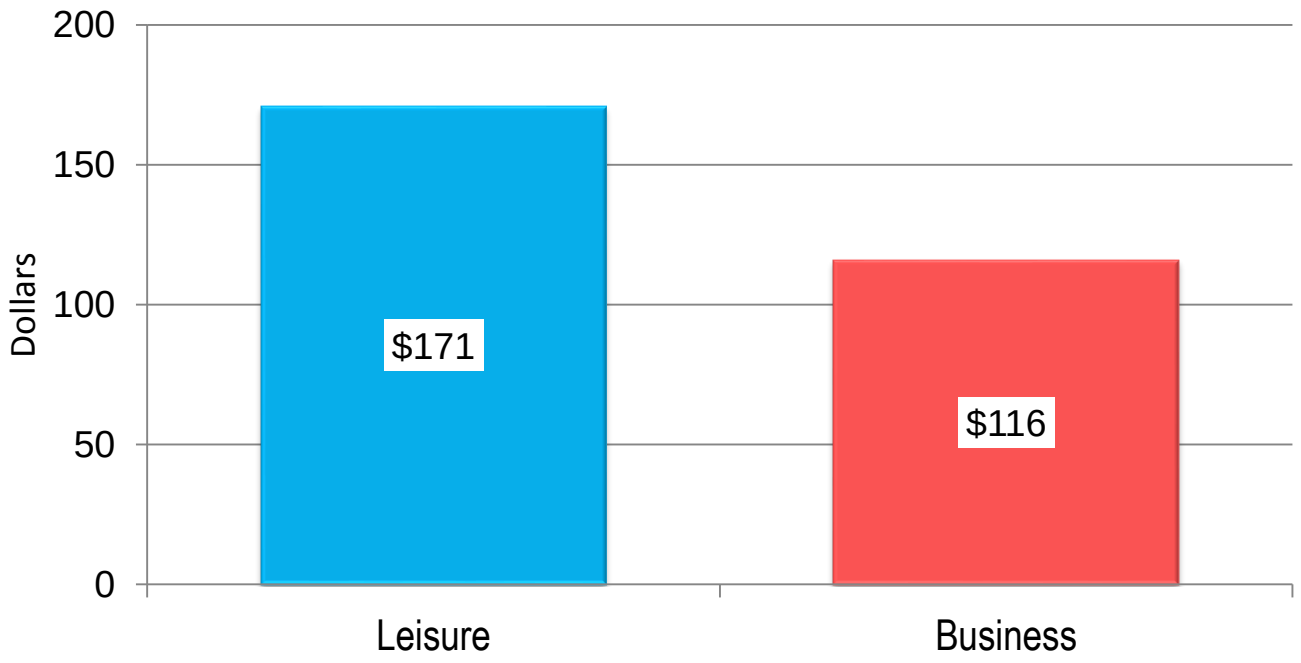


Average Per Party Expenditures on Day Trips — By Sector

Base: Total Day Person-Trips to Maryland

Average Per Party Expenditures on Day Trip — by Trip Purpose

Base: Total Day Person-Trips to Maryland



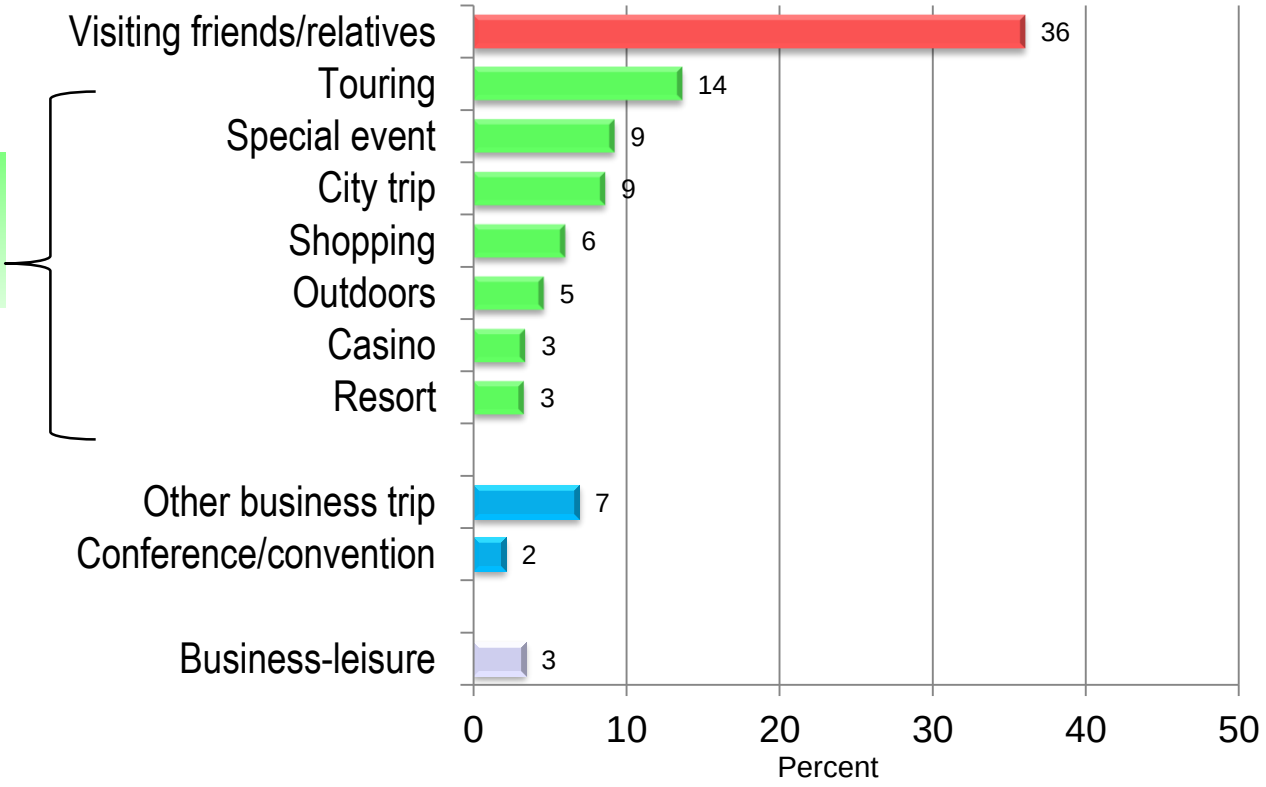
*Low base size

Day Trip Characteristics

Main Purpose of Trip

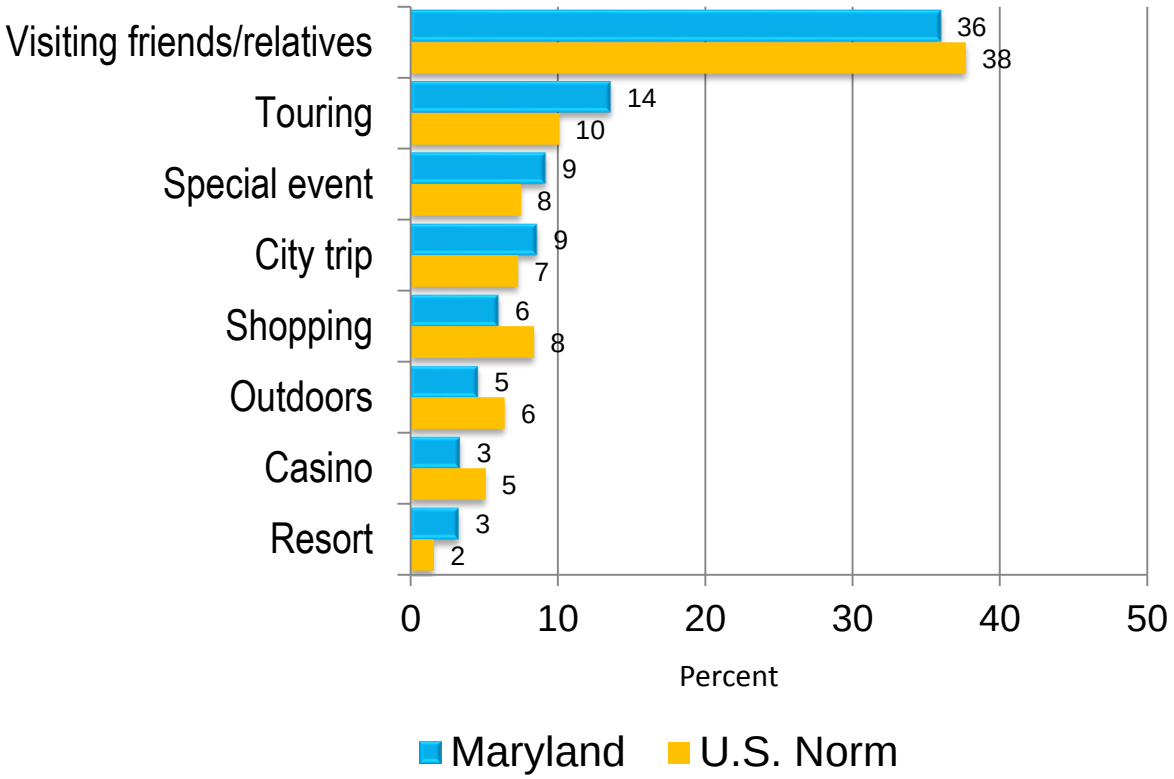
Base: Day Person-Trips to Maryland

Marketable Trips 52%



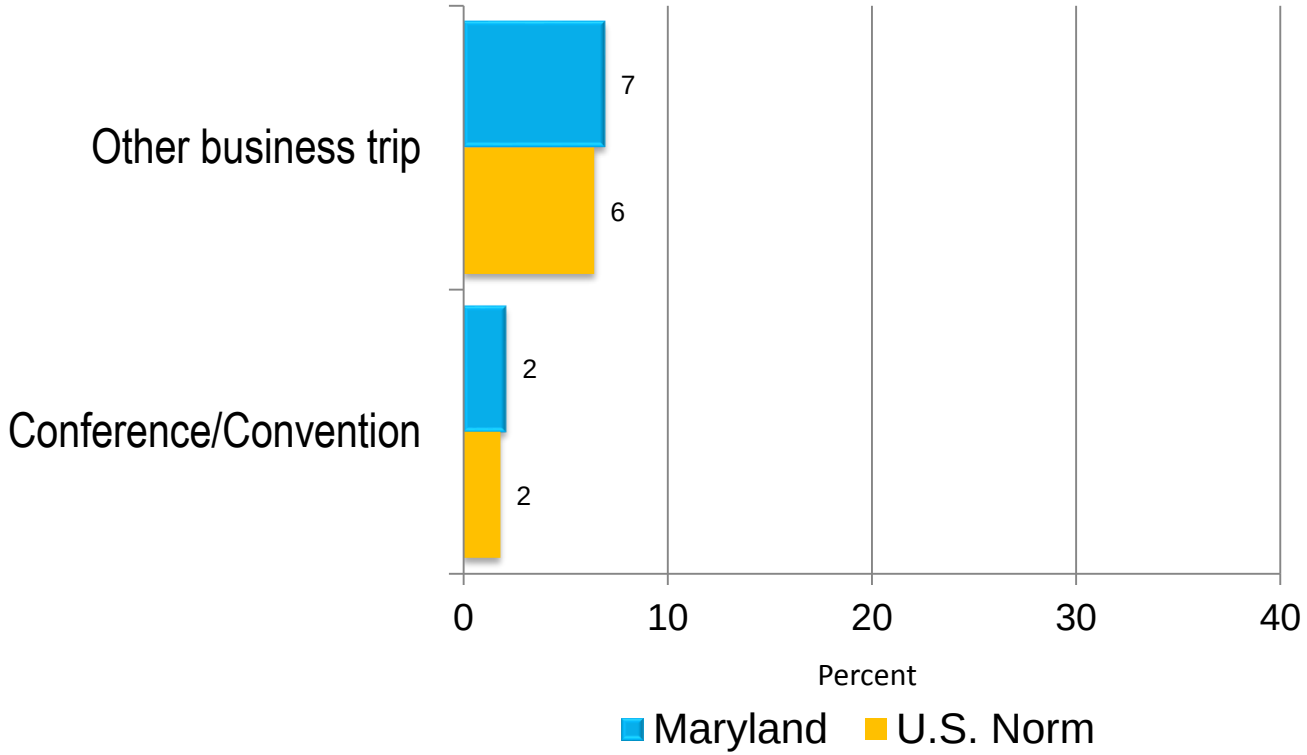
Main Purpose of Leisure Trip — Maryland vs. National Norm

Base: Day Person-Trips



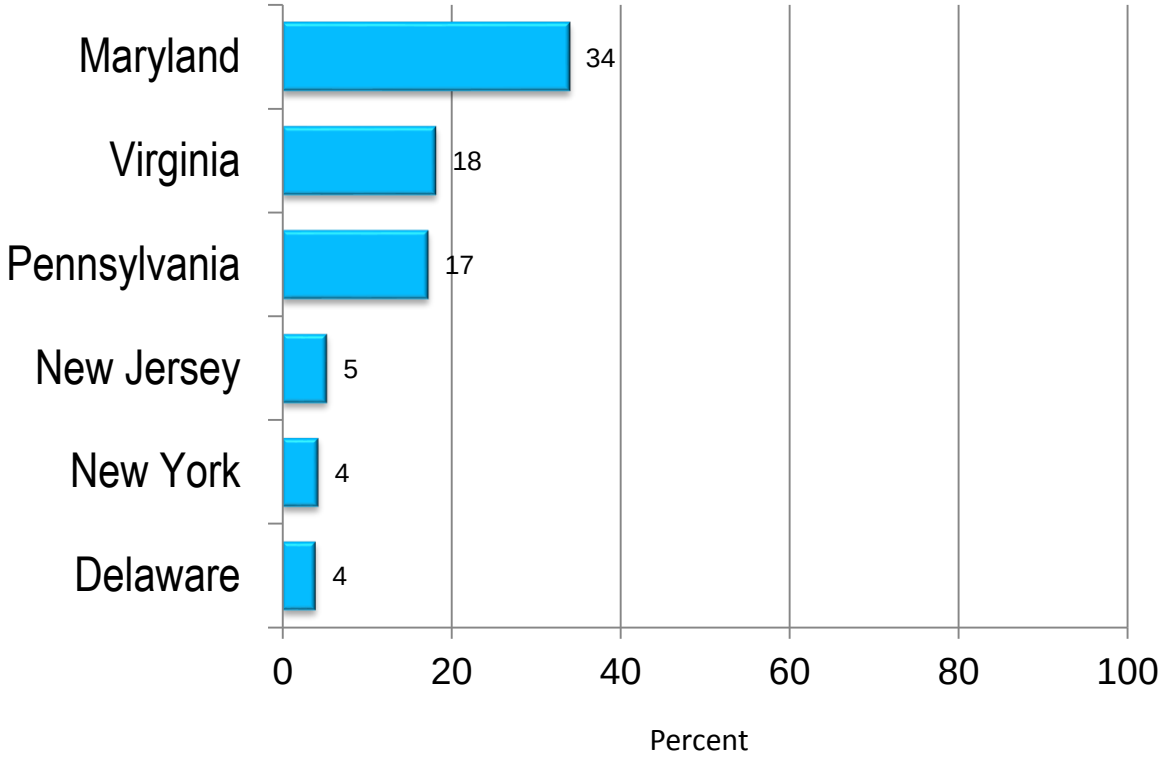
Main Purpose of Business Trip — Maryland vs. National Norm

Base: Day Person-Trips



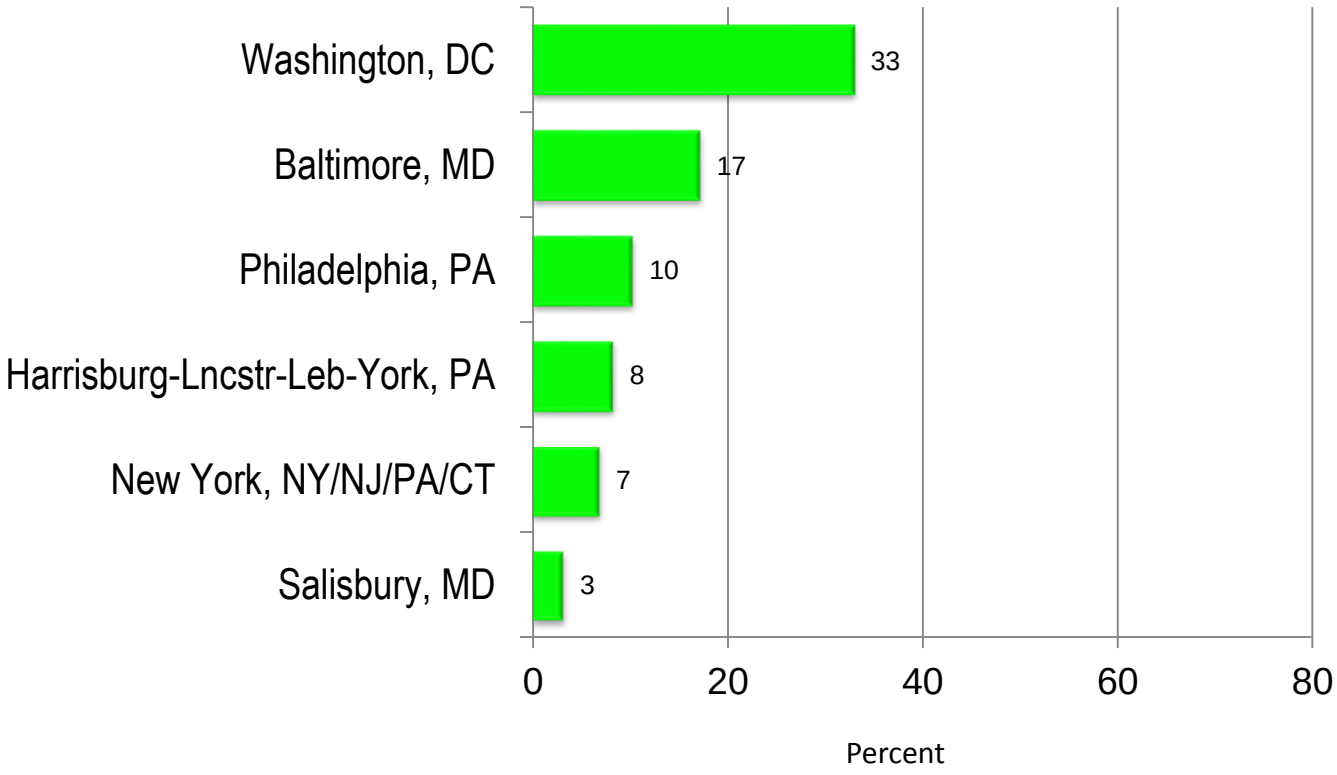
State Origin Of Trip

Base: Day Person-Trips to Maryland



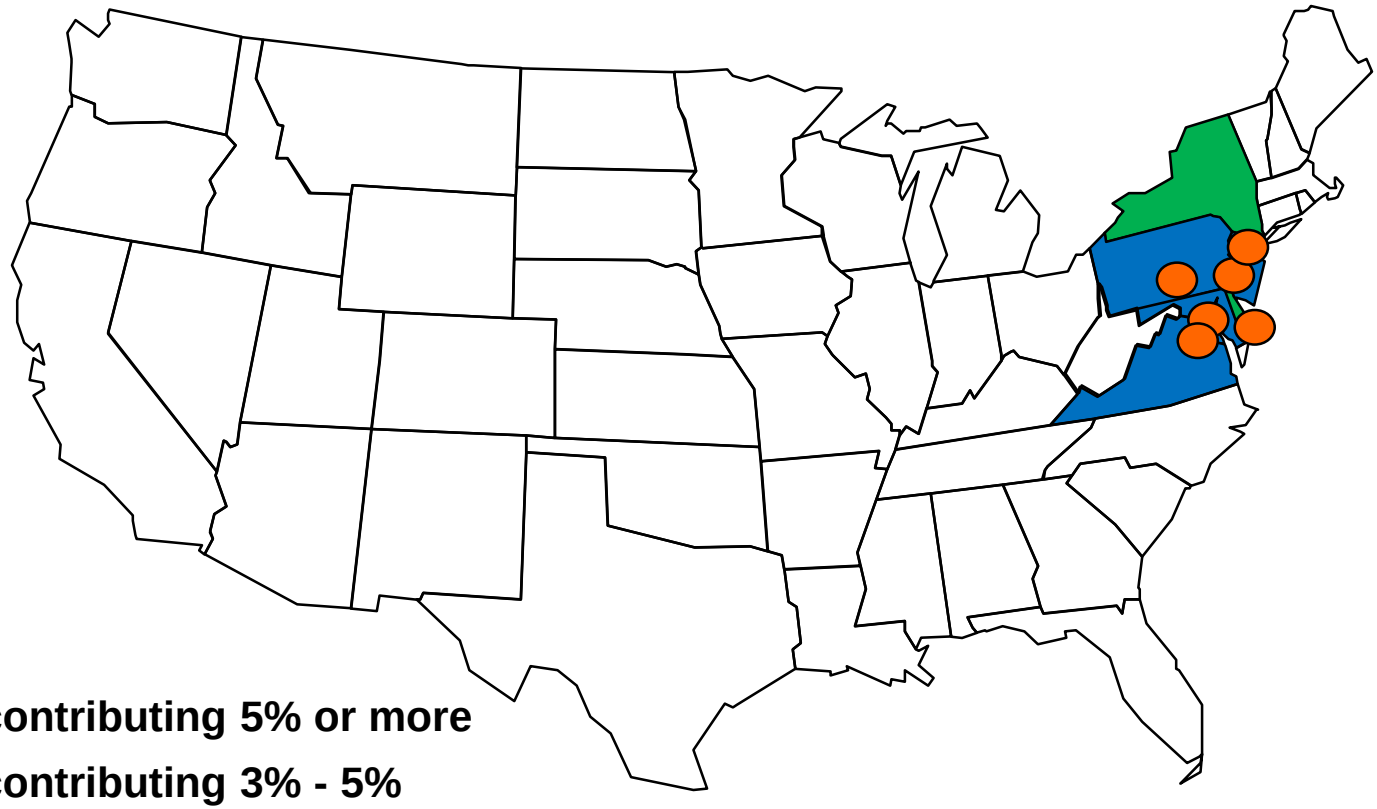
DMA Origin Of Trip

Base: Day Person-Trips to Maryland



Sources of Business

Base: Day Person-Trips to Maryland



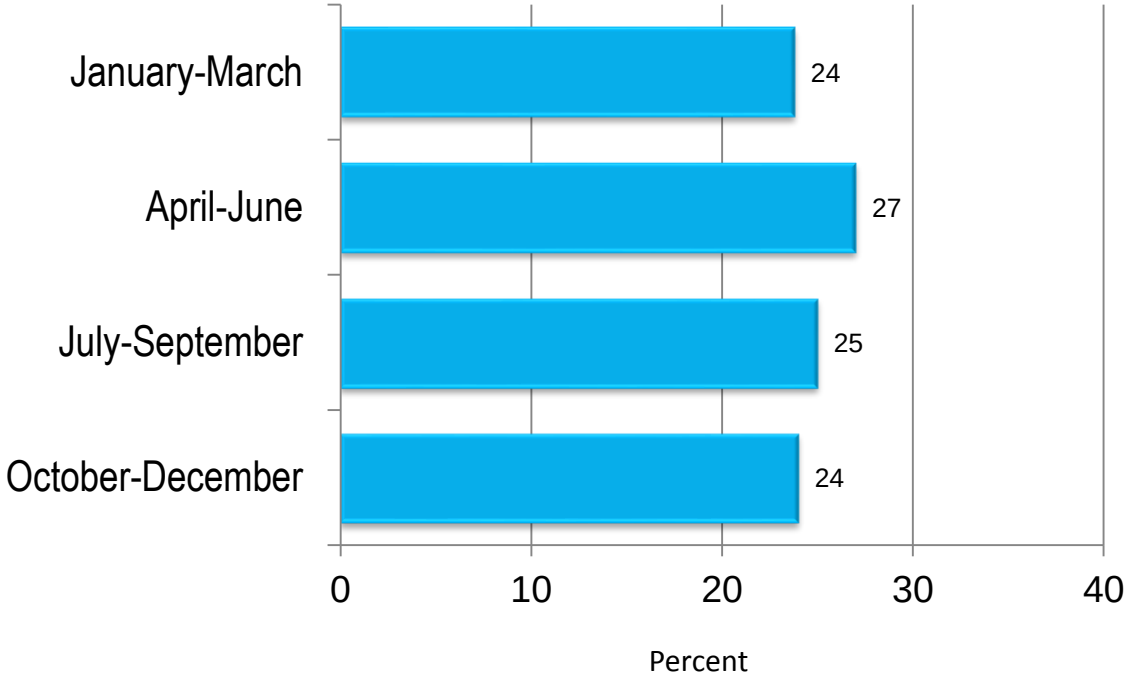
States contributing 5% or more

States contributing 3% - 5%

DMA's contributing more than 2%

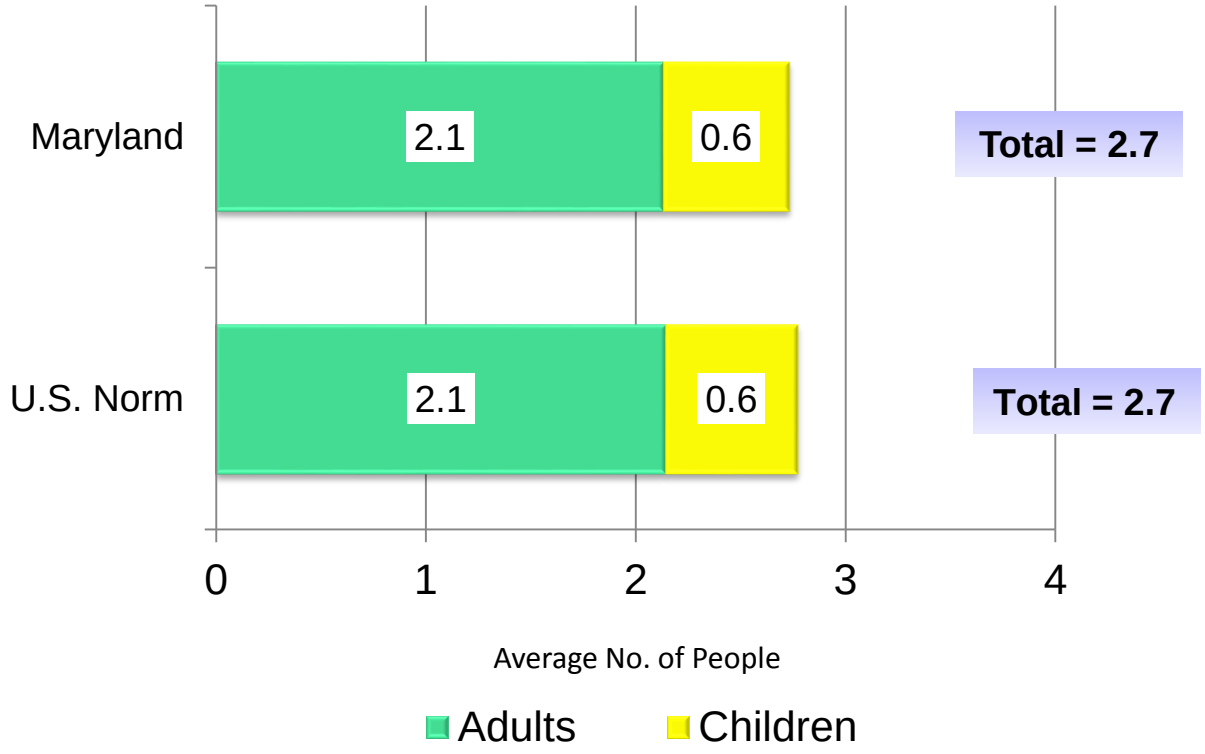
Season of Trip

Base: Day Person-Trips to Maryland



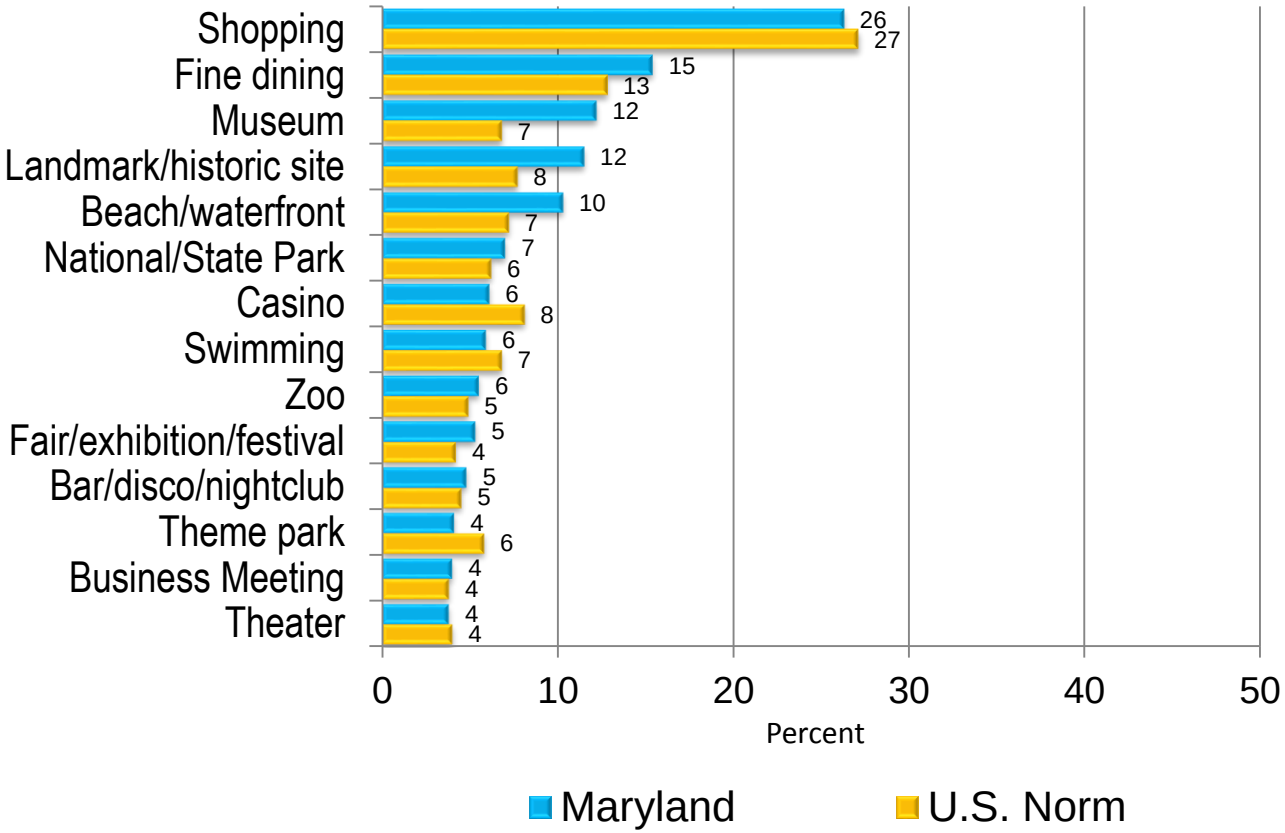
Size of Travel Party

Base: Day Person-Trips



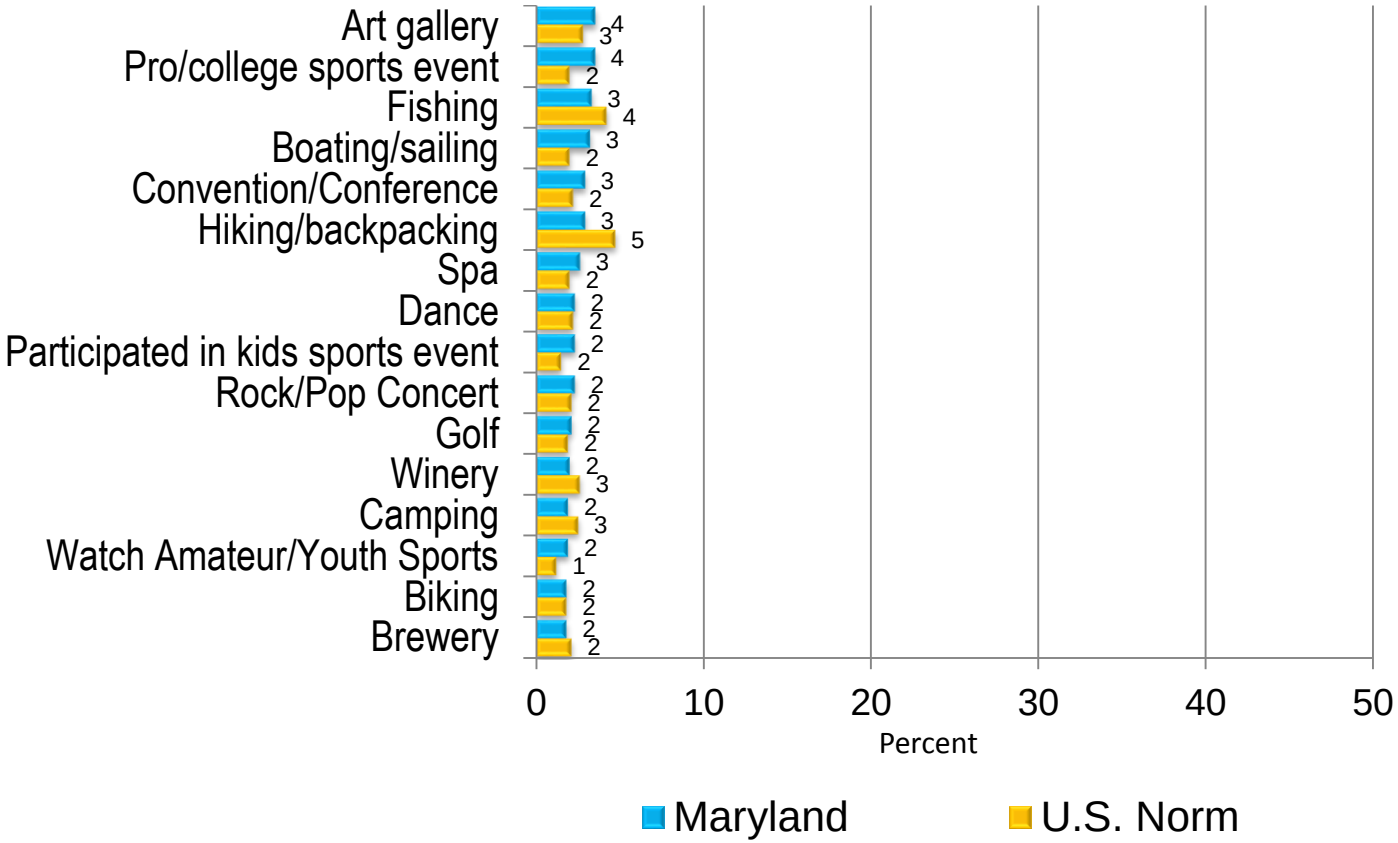
Activities and Experiences

Base: Day Person-Trips to Maryland



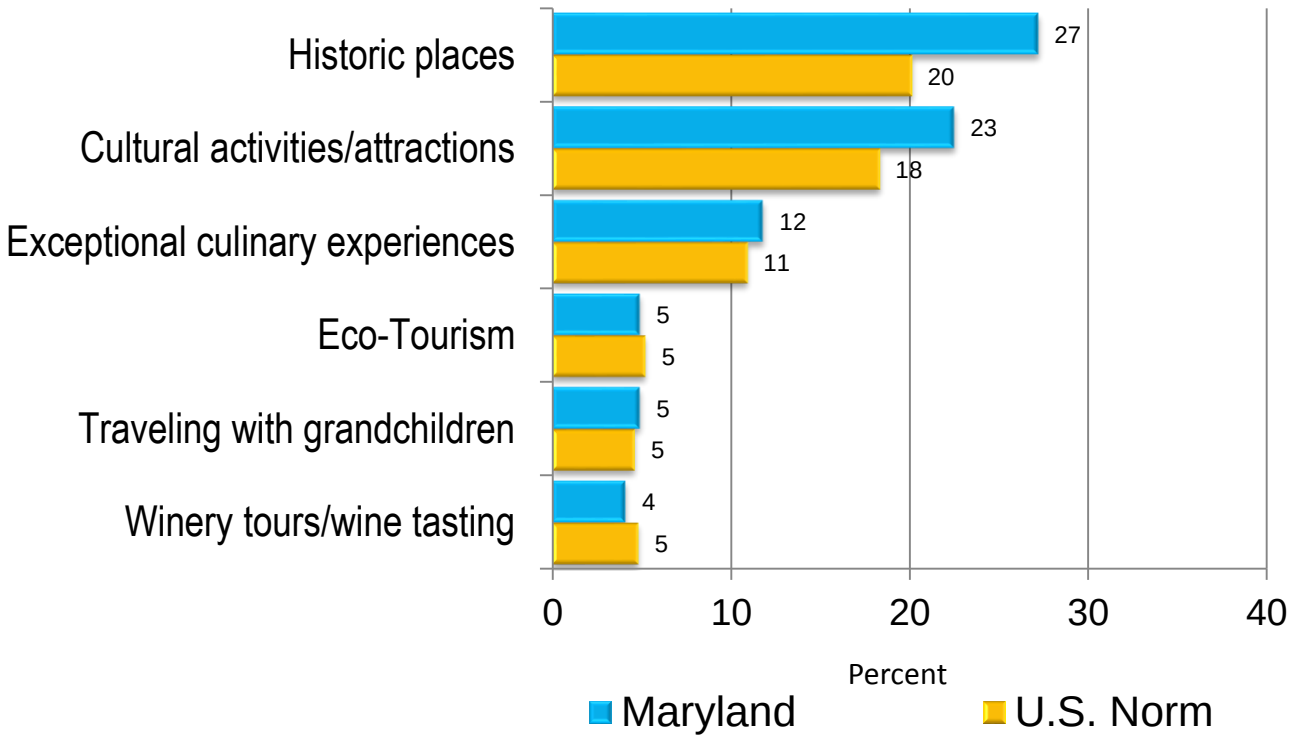
Activities and Experiences (Cont'd)

Base: Day Person-Trips to Maryland



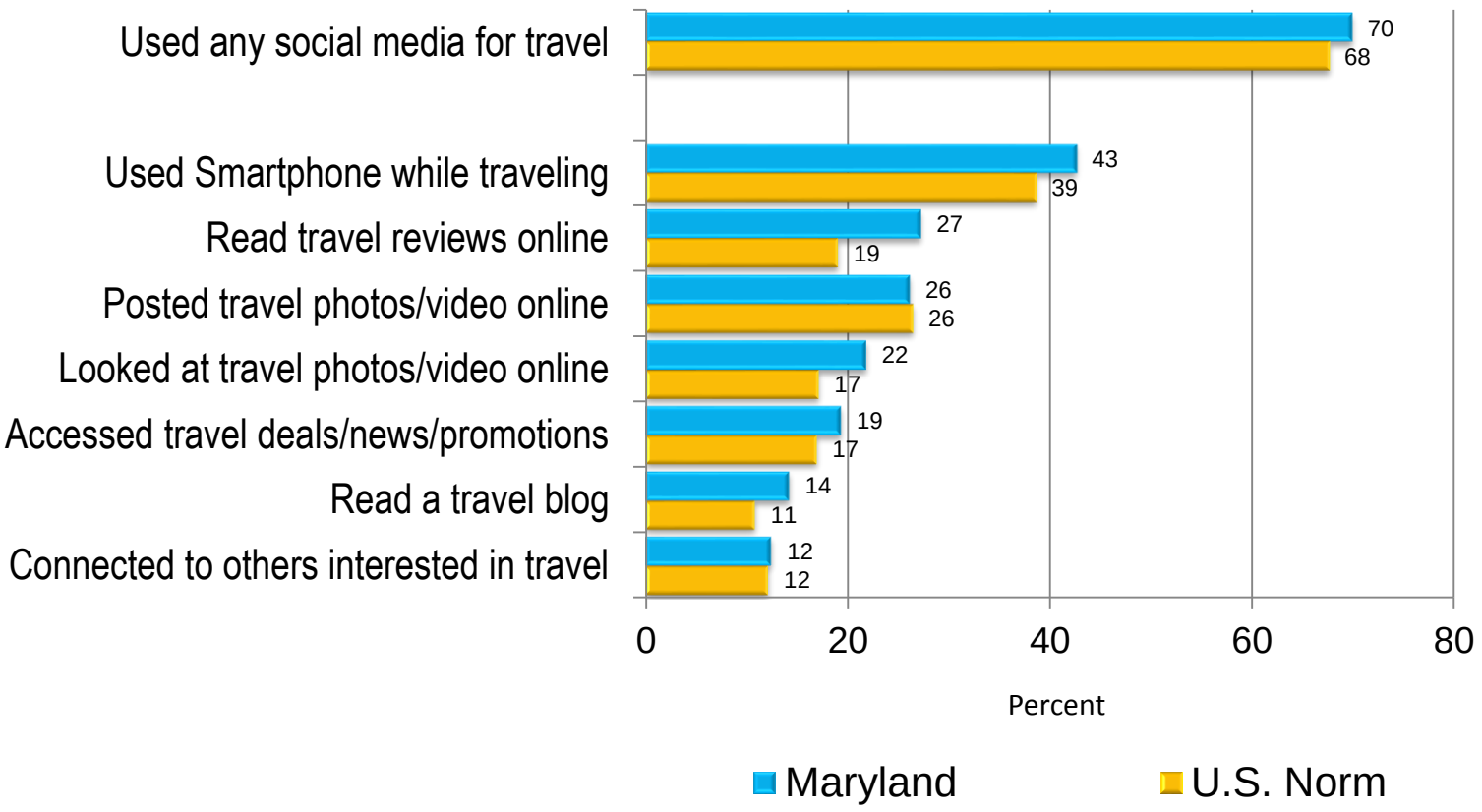
Activities of Special Interest

Base: Day Person-Trips to Maryland



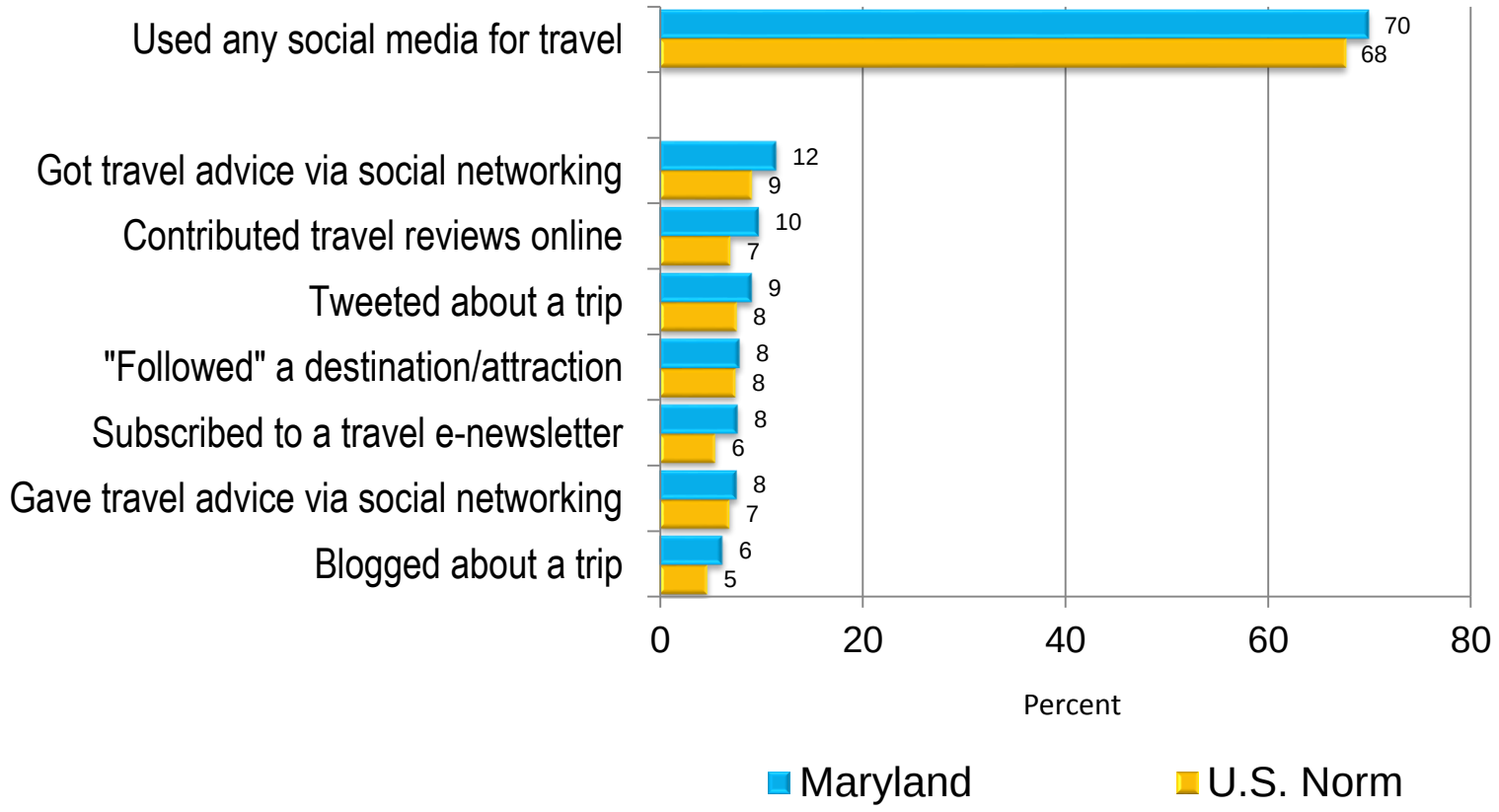
Social Media Use by Travelers

Base: Day Person-Trips



Social Media Use by Travelers (Cont'd)

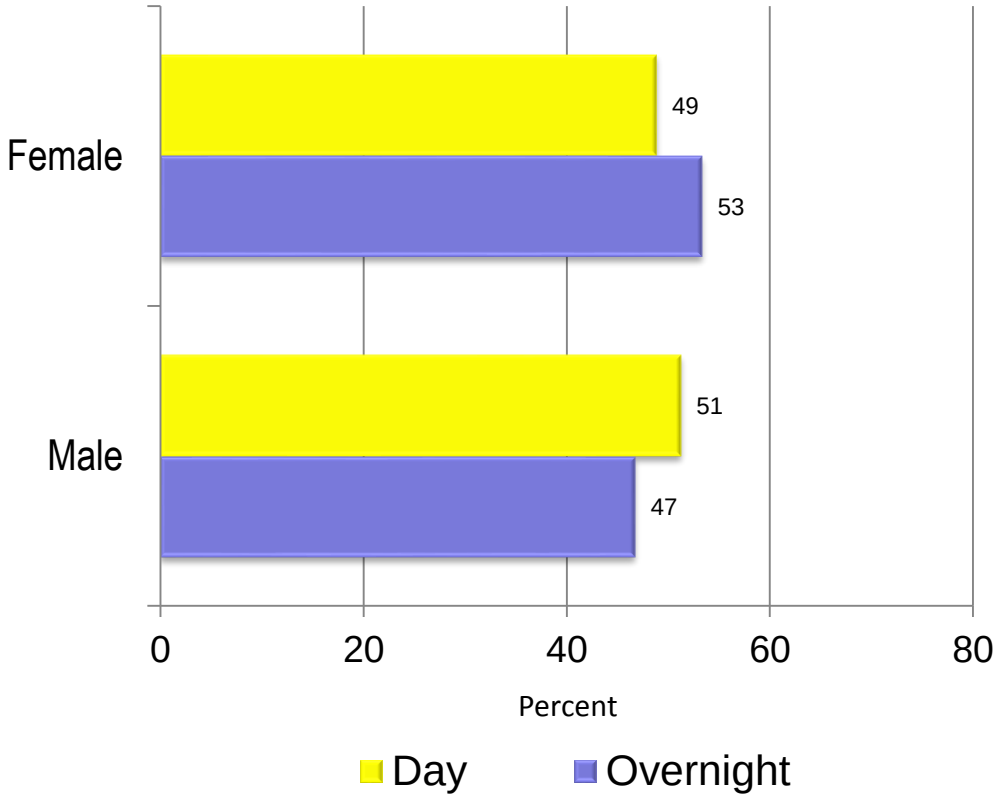
Base: Day Person-Trips



Traveler Profile – Day vs. Overnight Visitors to Maryland

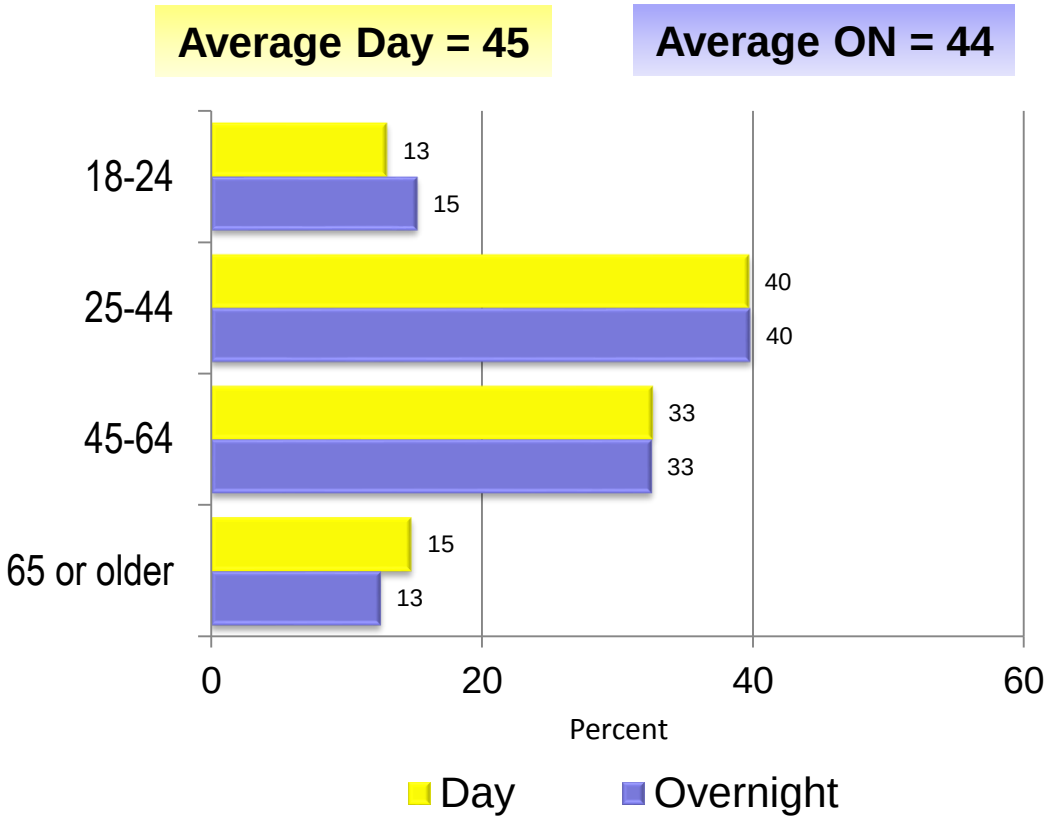
Gender

Base: Total Person-Trips to Maryland



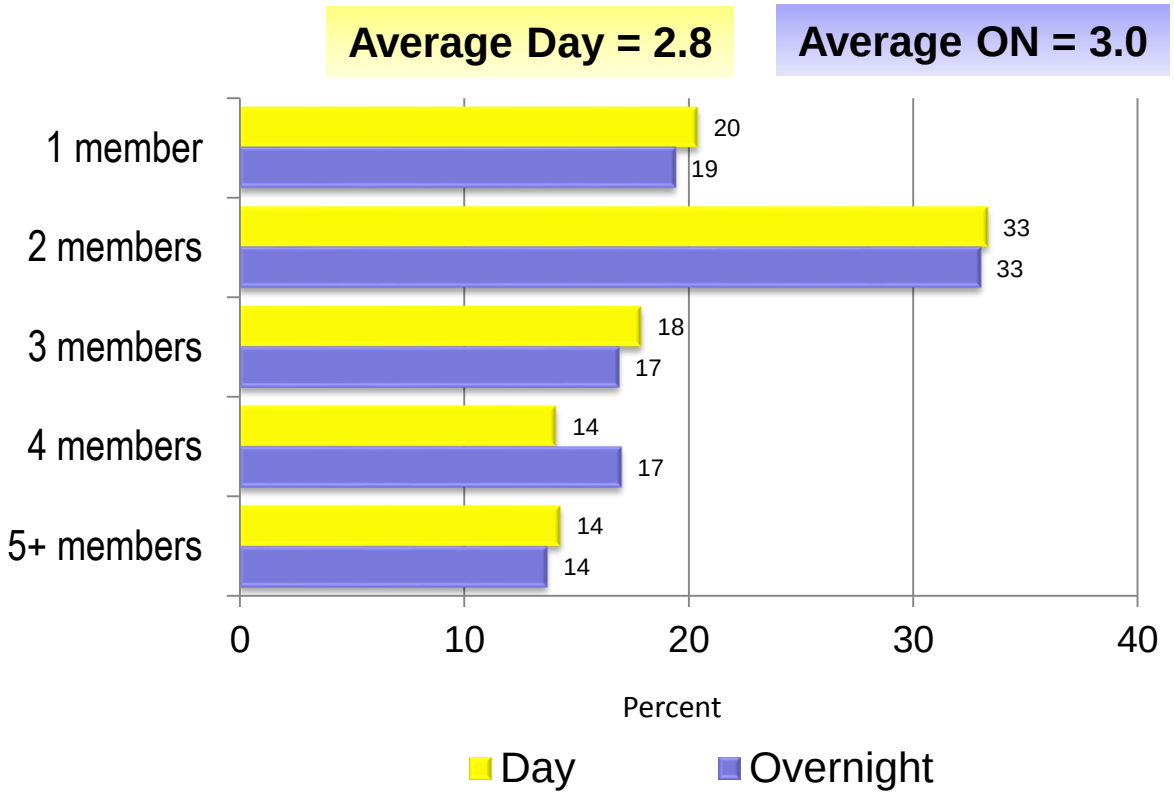
Age

Base: Total Person-Trips to Maryland



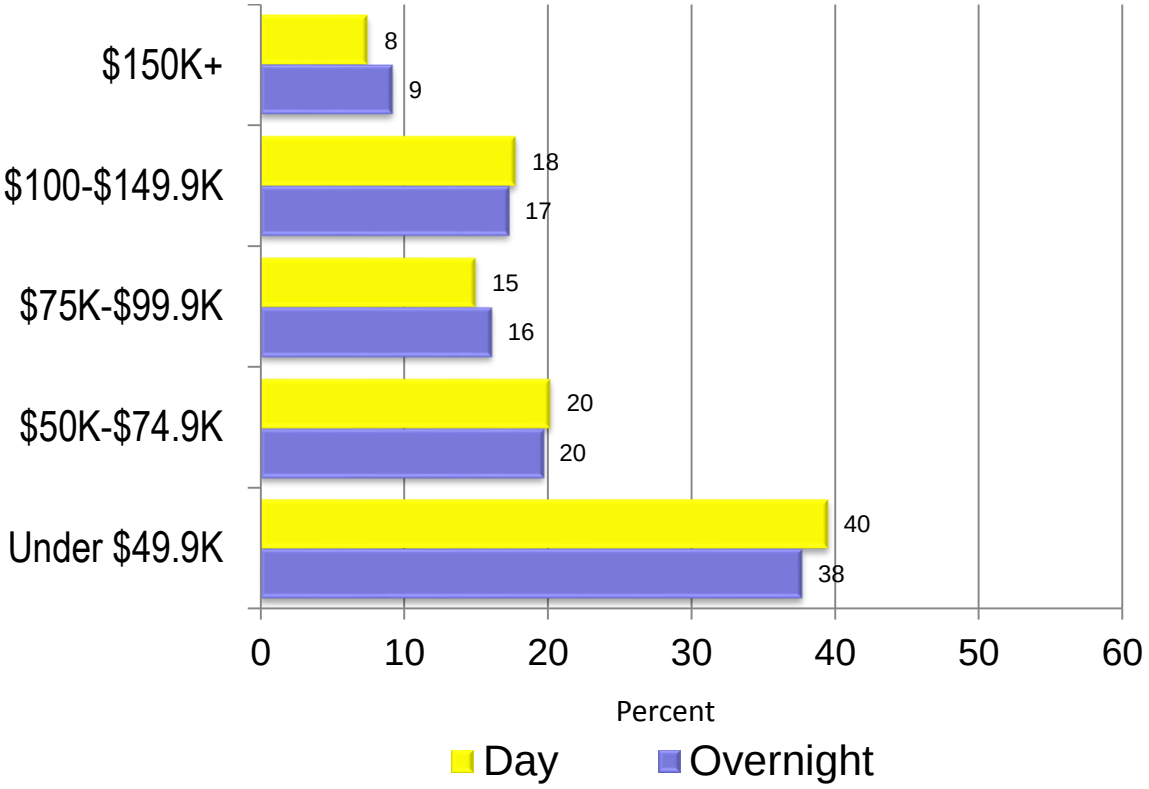
Household Size

Base: Total Person-Trips to Maryland



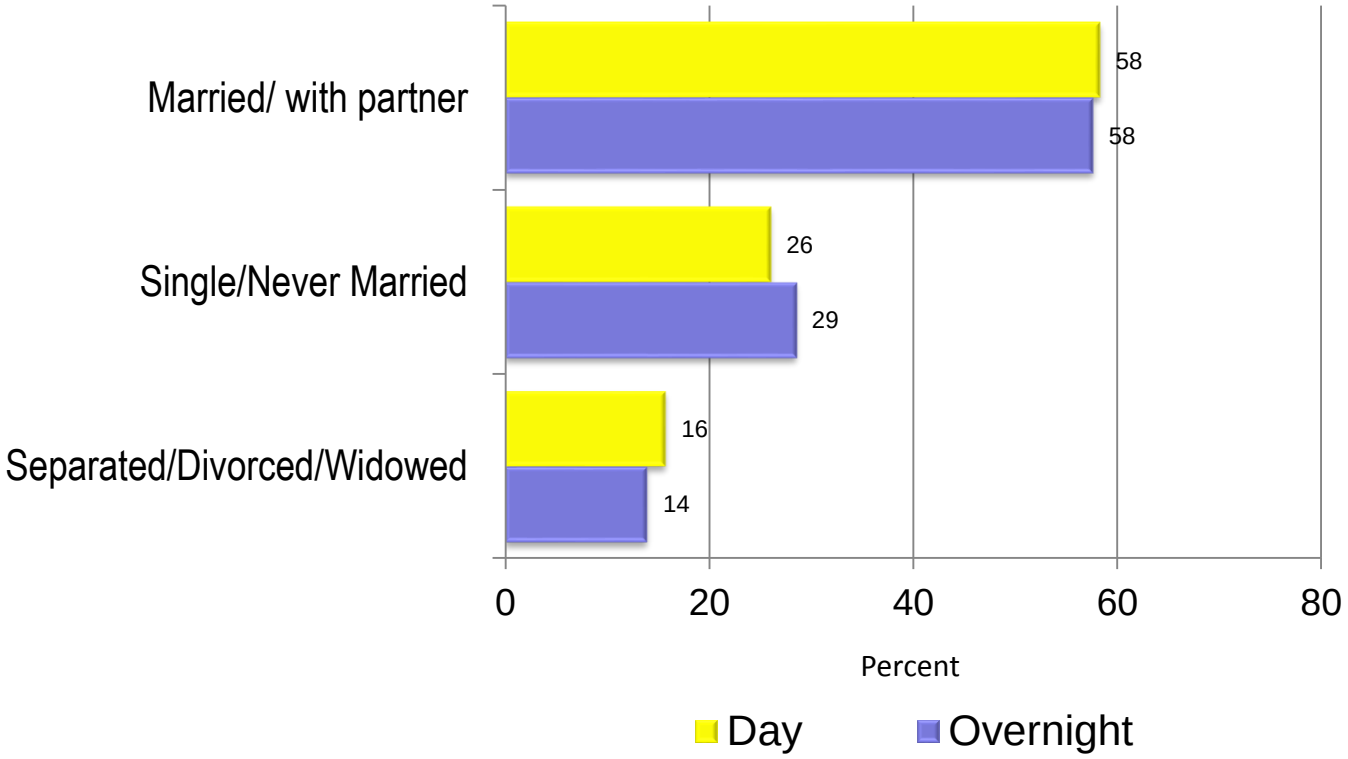
Household Income

Base: Total Person-Trips to Maryland



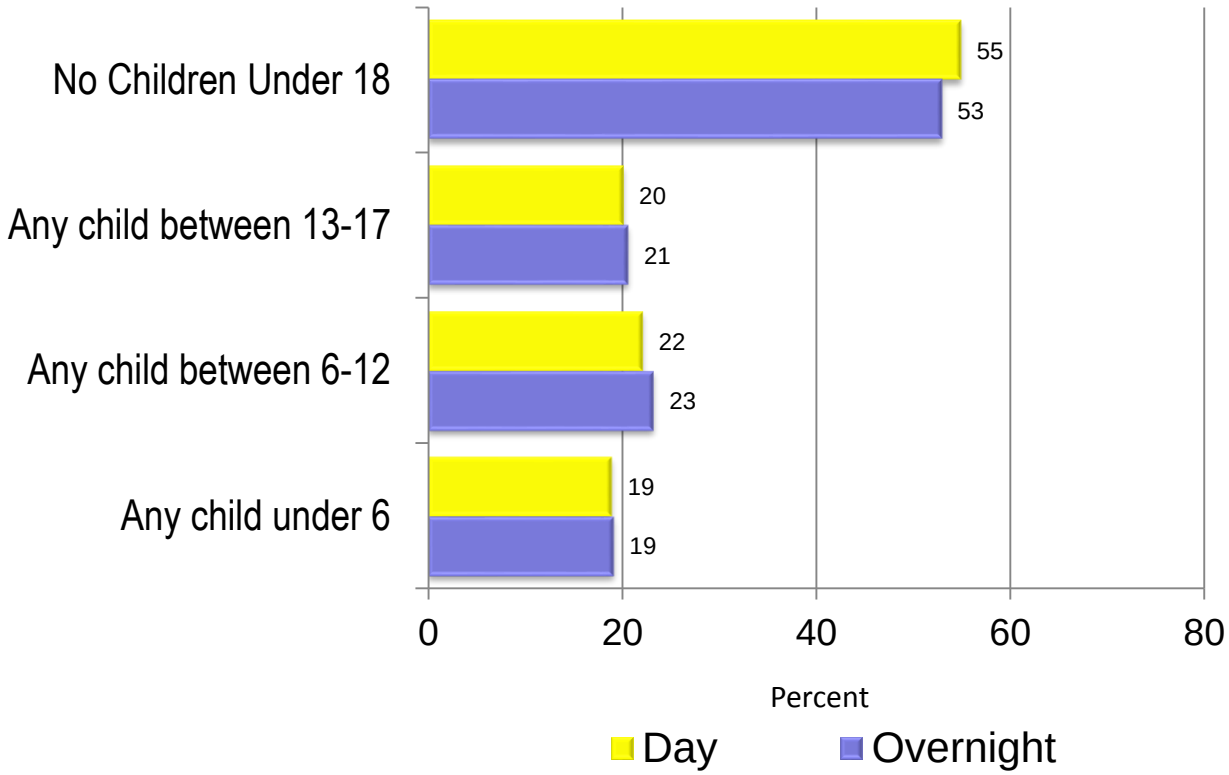
Marital Status

Base: Total Person-Trips to Maryland



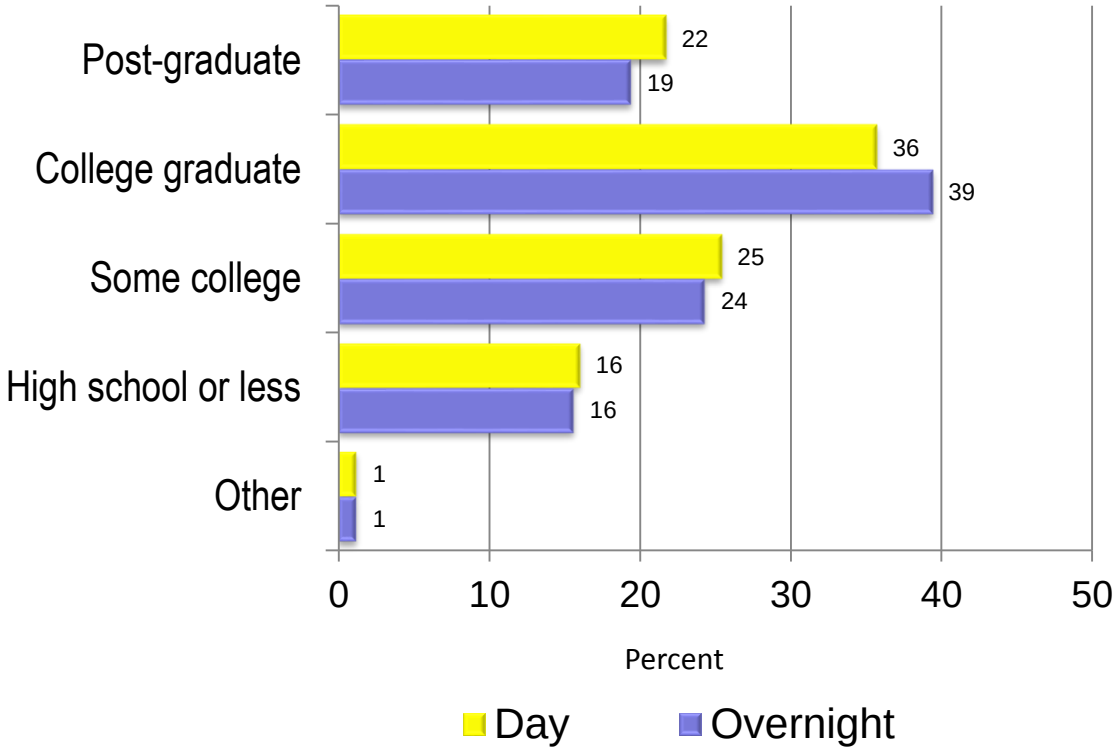
Children in Household

Base: Total Person-Trips to Maryland



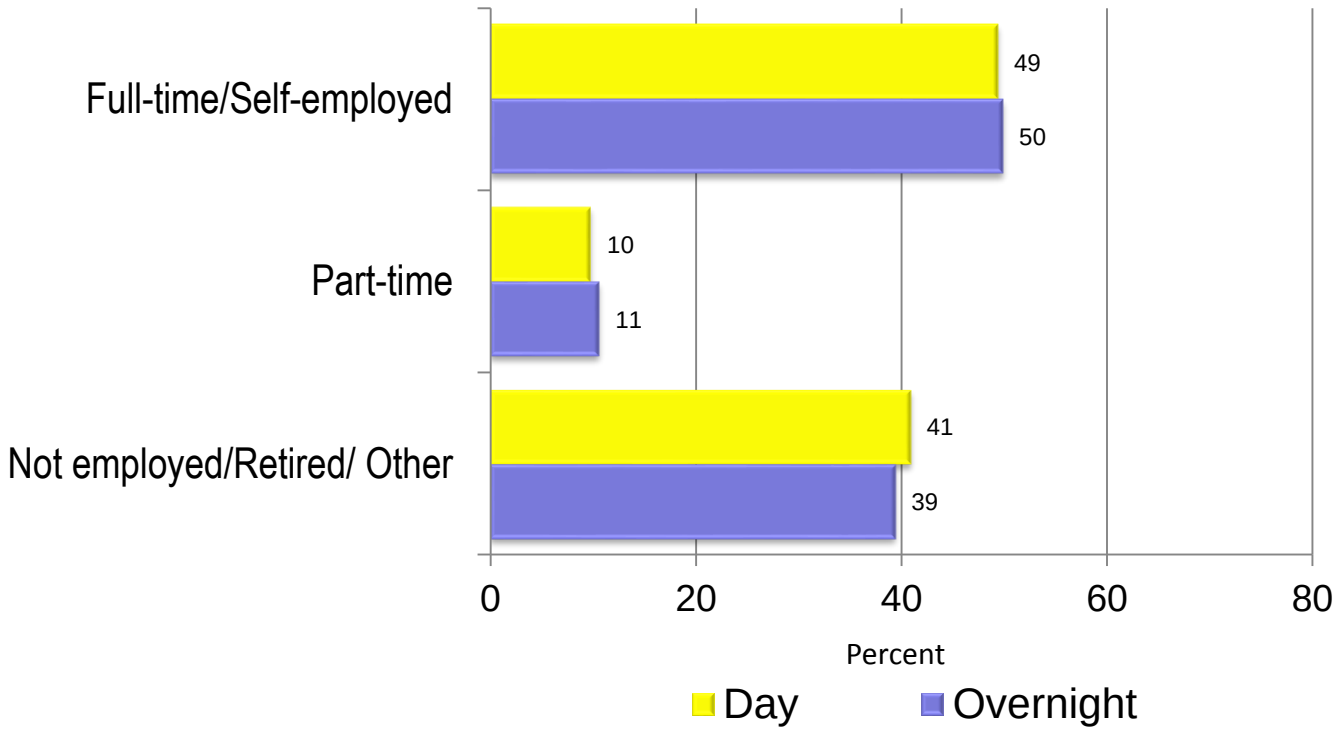
Education

Base: Total Person-Trips to Maryland



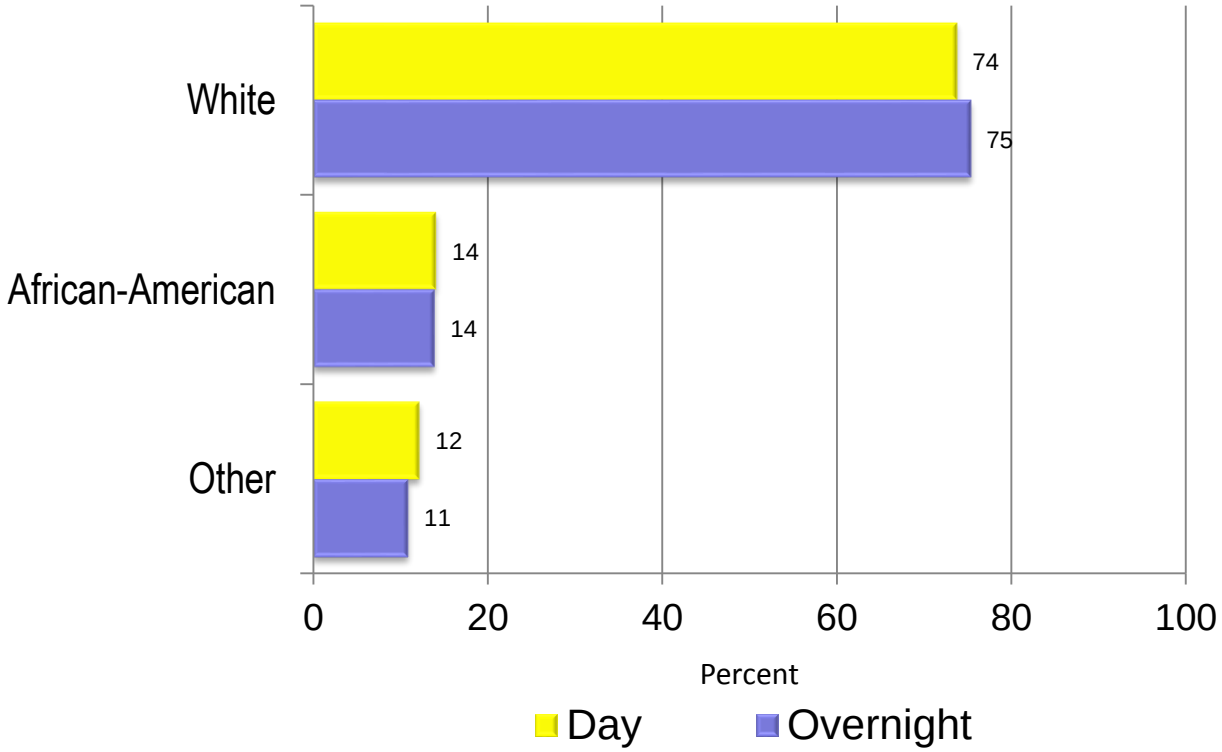
Employment

Base: Total Person-Trips to Maryland



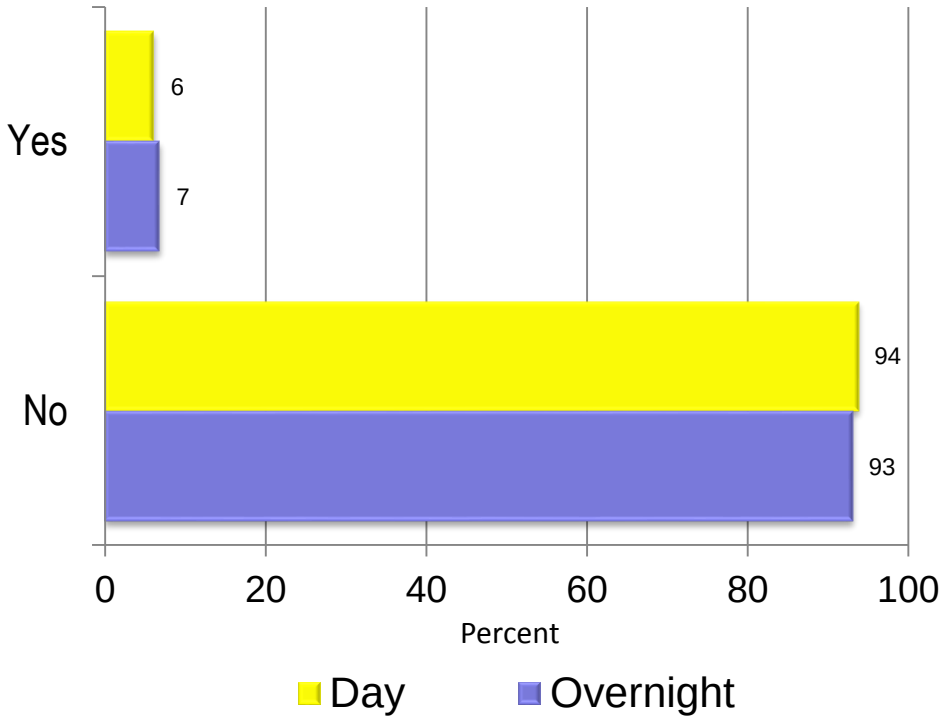
Race

Base: Total Person-Trips to Maryland



Hispanic Background

Base: Total Person-Trips to Maryland



Appendix A: Key Terms Defined

Key Terms Defined

- An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.

- A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.

- A **Person-Trip** is one trip taken by one visitor.
  - *Person-trips are the key unit of measure for this report.*

Trip-Type Segments

Total Trips = Leisure + Business + Business-Leisure

- **Leisure Trips:** includes all trips where the main purpose was one of the following:
  - *Visiting friends/relatives*
  - *Touring through a region to experience its scenic beauty, history and culture*
  - *Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating*
  - *Special event, such as a fair, festival, or sports event*
  - *City trip*
  - *Cruise*
  - *Casino*
  - *Theme park*
  - *Resort (ocean beach, inland or mountain resort)*
  - *Skiing/snowboarding*
  - *Golf*
- **Business Trips:** includes
  - *Conference/convention*
  - *Other business trip*
- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.

Marketable Trips: Includes all leisure trips, with the exception of visits to friends/relatives