Hispanic Leisure Travelers:

Perceptions of Maryland

Background

Hispanic Traveler Overview
Study Methodology & Purpose
Notes on Acculturation & Current Climate
Demographics & Weighting
Hispanic Identity & Culture

Study Methodology & Purpose

- The Maryland Office of Tourism is interested in exploring the Hispanic community to understand the unique cultural nuances, traditions and values of this valuable market segment.
  - In 2022, Hispanic travelers to Maryland made up approximately 9% of overall visitors. *

- A study was conducted using a mixed-method approach, beginning with quantitative research followed by qualitative insights, to gain a deeper understanding of Hispanic travelers and identify strategies to increase their visitation to Maryland.
  - Nov 2024 – Jan 2025: Quantitative Survey of Hispanic Travelers in Key Markets
  - Feb 2025: Qualitative Focus Groups of Hispanic Travelers

- Differences between groups that are statistically significant (e.g., due to something other than chance or randomness) are indicated by red and blue text throughout the deck.
  - Blue text with an up arrow indicates that a finding is statistically HIGHER for one group than it is for others.
  - Red text with a down arrow indicates that a finding is statistically LOWER for one group.

- Insights from this study were informed by three supporting sources.
  - Vistas Latinas Report, MMGY Global, 2021 – provided foundational context on the U.S. Hispanic leisure traveler
  - Travel Performance/Monitor℠, DK Shifflet, 2022 – helped guide demographic quota setting for our primary research
  - MD Predictive Analytics Study, GRS 2021 – offered a comparison point to understand how Hispanic travelers interested in Maryland may differ from the general Maryland leisure travel audience.

Quantitative Survey

- Hispanic Leisure Travelers were recruited (N = 1753) from key markets, chosen based on top visitation rates to Maryland and areas of concentrated Hispanic populations. At least 350 travelers from each market were recruited from a random sample of survey panelists.
    - Survey was available to respondents in both English and Spanish
    - Markets included:
        - New York DMA
        - Philadelphia DMA
        - Pennsylvania outside Philadelphia DMA
        - DC/Northern VA DMA
        - Virginia outside DC DMA
    - Respondent qualifications:
        - Ages 18-72
        - Must identify as Hispanic/Latino
        - Must have at least $50K household income
        - Representative mix of genders
        - Representative mix of generations
        - Must have traveled for leisure within the US in the past two (2) years and stayed at least one night in a paid accommodation
        - Must intend to travel for leisure within the US and stay at least one night in a paid accommodation within the next two (2) years
        - Must consider MD for future overnight leisure trip
    - *Results were weighted by gender, age and household income to match the current population of US Hispanic leisure travelers according to MMGY's 2021 Vistas Latinas report.*

Qualitative Focus Groups

- Zoom Focus Groups were conducted with Hispanic leisure travelers from target states to gather more in-depth and conversational information around traveling to Maryland.
    - Groups were moderated by Veronica Cool of Cool & Associates, LLC, a Maryland expert on Hispanic culture, and were conducted in English and Spanish
    - Participants were from the states of New York, New Jersey, Pennsylvania, and Virginia
    - Three (3) focus groups were conducted with 8 participants in each (N = 23) via the Zoom online platform
    - Most represented countries including Colombia, Cuba, Dominican Republic, Ecuador, Puerto Rico, United States, and Venezuela
    - Qualifications included:
        - Must have self-identified as Hispanic, Latino/a, Latine or Afro-Latino/a
        - Must have traveled for leisure and stayed in paid accommodations in the past 2 years
        - Must intend to travel for leisure and stay in paid accommodations in the next 2 years
        - Must consider Maryland as a future travel destination
        - Articulate, open to speaking about leisure travel and what drives/motivates them
    - A good mix of ages, education, gender and income levels were recruited
    - A mix of past visitors and non-visitors to Maryland were recruited

Focus Group Participants

Name	Home State	Age
Ethan G.	NY	35
Anny A.	NJ	32
Alanna P.	NJ	35
Clay F.	PA	26
Nathalie R.	NY	22
Karlin C.	NJ	32
Hannah G.	NY	18
Louis N.	NY	56
Ruben V.	NY	21
Luke W.	VA	32
Rafael C.	NY	38

Name	Home State	Age
Juan N.	PA	47
Kevin G.	NY	29
Taisha R.	NY	39
Jared N.	PA	23
Theresa R.	VA	27
George C.	VA	33
Steve W.	NY	30
María P.	PA	27
Luis R.	NY	57
Josh P.	VA	30
Rosalía F.	VA	65
Stephanie P.	NY	35

A Note on Target Audience Acculturation

- It is important to clarify and define the audience of Maryland's Hispanic travelers, especially for non-Hispanics. Keep in mind that personal cultural perspectives could influence how you interpret the findings of this report. Approaching the insights with an open mind will help ensure a well-rounded understanding.

- According to MMGY's Vistas Latinas (2021), US Hispanic leisure travelers:
  - Are younger than average (Millennial/Gen X)
  - Are 63% men (vs. 57% men for non-Hispanics)
  - Have a median income of $75K
  - Take 2.9 overnight trips per year
  - Spend $798 on each overnight trip ($71 more than US overnight leisure travelers overall)
  - Spend more on shopping and entertainment than non-Hispanics

- The most likely out-of-state Hispanic-Latino Maryland visitor is generally highly acculturated:
  - Younger (Millennial)
  - Middle income ($50-$100K)
  - Born in the US
  - Speaks Spanish and English equally

Vistas Latinas; A 2021 MMGY Global landmark study on Hispanic leisure travelers.

A Note on the Current Climate (Jan - Mar 2025)

- The current political and social climate plays a crucial role in Hispanic travel decisions. Policies perceived as anti-immigrant or restrictive can create uncertainty and hesitation, particularly among mixed status families. Concerns about documentation requirements, safety and potential discrimination may lead some travelers to avoid certain destinations. Spanish-dominant and first-generation immigrants are more likely to prioritize travel to places where they feel welcome and have cultural or family connections. In contrast, destinations perceived as less inclusive may be overlooked despite their attractions.

- Travel decisions within Hispanic families often factor in cultural preferences, financial considerations, and multigenerational input. In mixed-status households, where members have different immigration statuses, travel planning can be complicated – hesitancy around documentation and safety are top of mind.

- Acculturation also impacts travel behaviors and budgeting. For instance, although many focus group participants were fluent in English and Spanish, and were comfortable navigating English-speaking environments, they stated a preference for destinations that acknowledge their cultural background. Some participants noted that when traveling with older relatives, they preferred places with Spanish-language resources, even if they personally didn't need them. Others mentioned that their travel decisions were influenced by family ties, with visits often revolving around reconnecting with relatives or familiar communities.

- Acknowledging the aforementioned concerns and fostering a sense of inclusion can be key to attracting Hispanic travelers to Maryland.

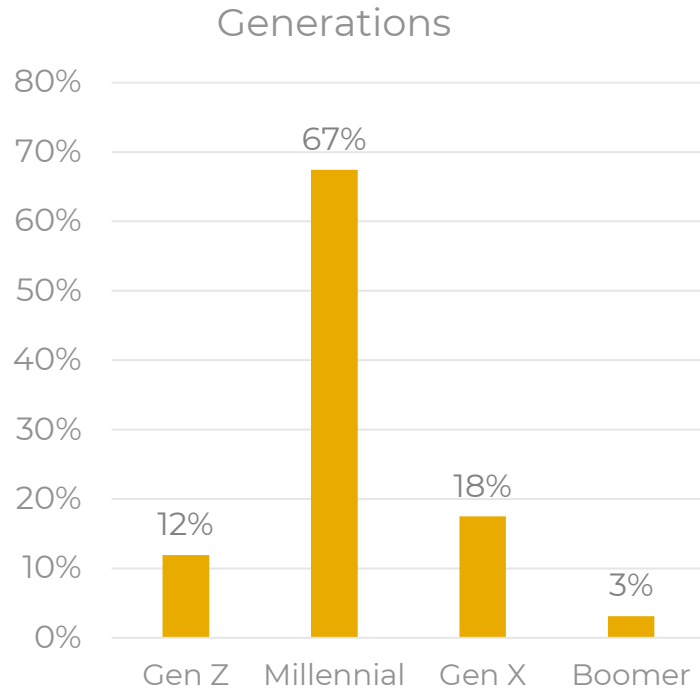# Demographic Weighting of Quantitative Survey Results

- To ensure survey samples are demographically representative of a particular target population, a strategy of **weighting** is often used. This strategy involves putting more emphasis on underrepresented populations and less emphasis on overrepresented populations.

- These survey results were weighted by **Age, Gender and Household Income** to reflect the actual population metrics gathered by MMGY Global in their landmark 2021 study "Vistas Latinas," which helped define the US domestic population of Hispanic leisure travelers.

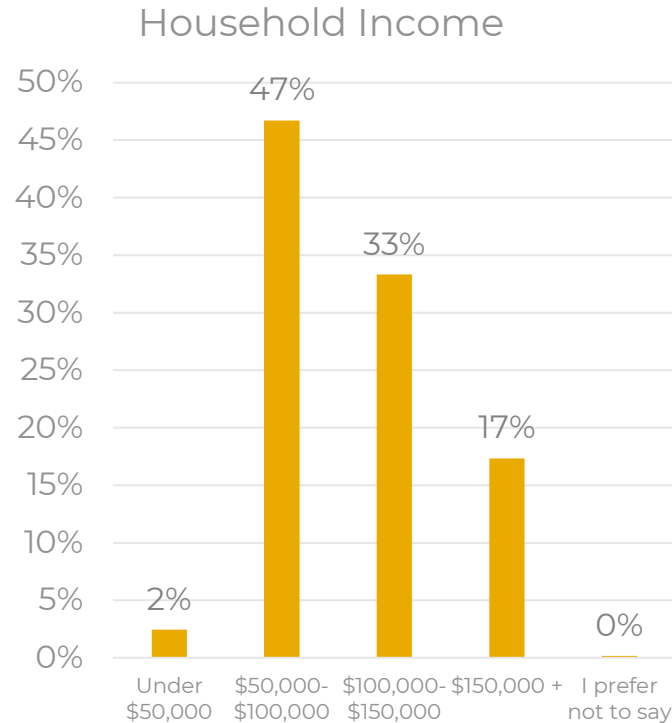| Variable	Categories	Weight Applied
Generations	Boomer	19%
	Gen X	26%
	Millennials	39%
	Gen Z	16%
Gender	Man	50%
	Woman	50%
Household Income	$50,000-$100,000	56%
	$100,000-$150,000	25%
	$150,000+	20%

Weighting used stratifications of the target population by Vistas Latinas; A 2021 MMGY Global landmark study on Hispanic leisure travelers.

Demographics (Unweighted)

Generations

Gen Z	12%
Millennial	67%
Gen X	18%
Boomer	3%

Average age: 37.3

Household Income

Under $50,000	2%
$50,000-$100,000	47%
$100,000-$150,000	33%
$150,000 +	17%
I prefer not to say	0%

- The survey sample naturally skewed toward Millennial, $50-$150K HHI and men.

Gender

Man: 65%
Woman: 34%

■ Man   ■ Woman   ■ Non-binary
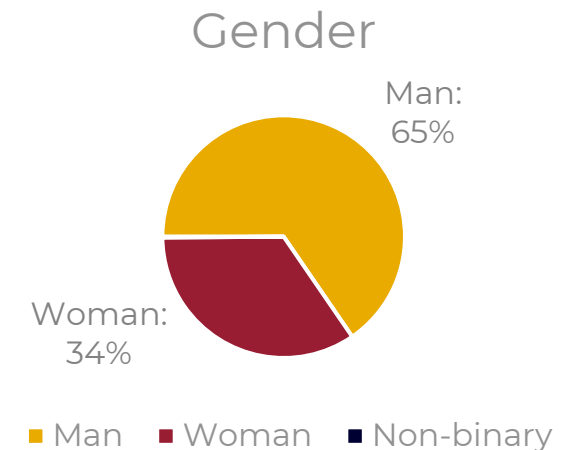
- *How old are you?*
- *What is your average household income?*
- *How do you identify your gender?*
- *Do you have children (under 18) at home?*
- *What are the ages of the children in your household?*
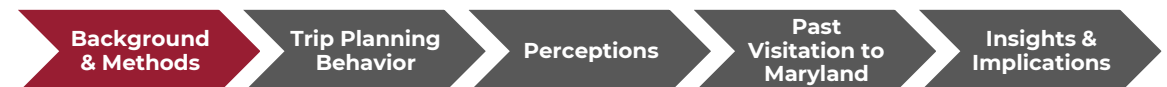
Demographics (Weighted)

Household Income

Category	Percent
$50,000-$100,000	56%
$100,000-$150,000	25%
$150,000 +	20%
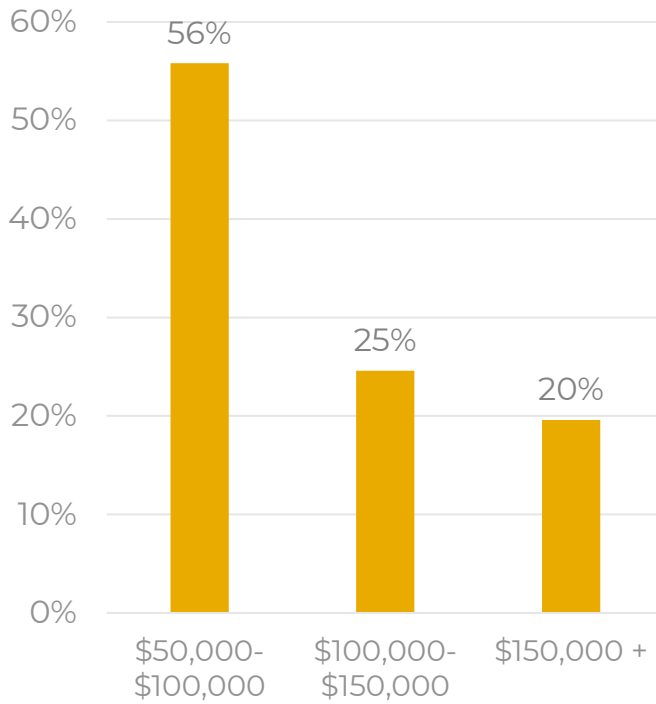
Average age: 42.6

Generations

Generation	Percent
Gen Z	16%
Millennial	39%
Gen X	26%
Boomer	19%
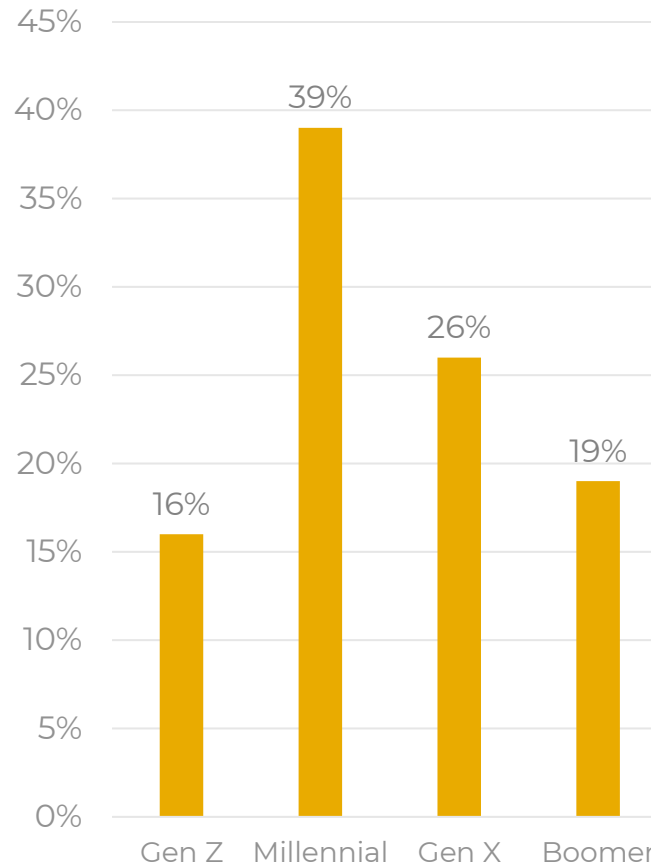
- A weighting strategy brought these skews more in line with MMGY Global findings of the wider population of Hispanic/Latino leisure travelers.

Gender
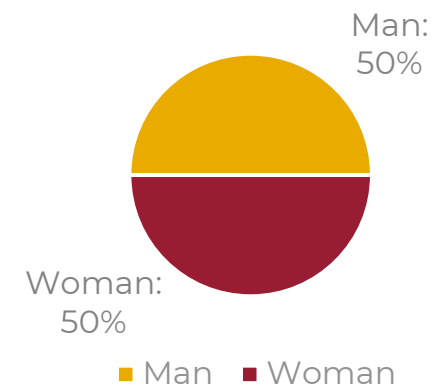
Man: 50%

Woman: 50%

■ Man ■ Woman

- *How old are you?*
- *What is your average household income?*
- *How do you identify your gender?*

Survey Respondent Origins
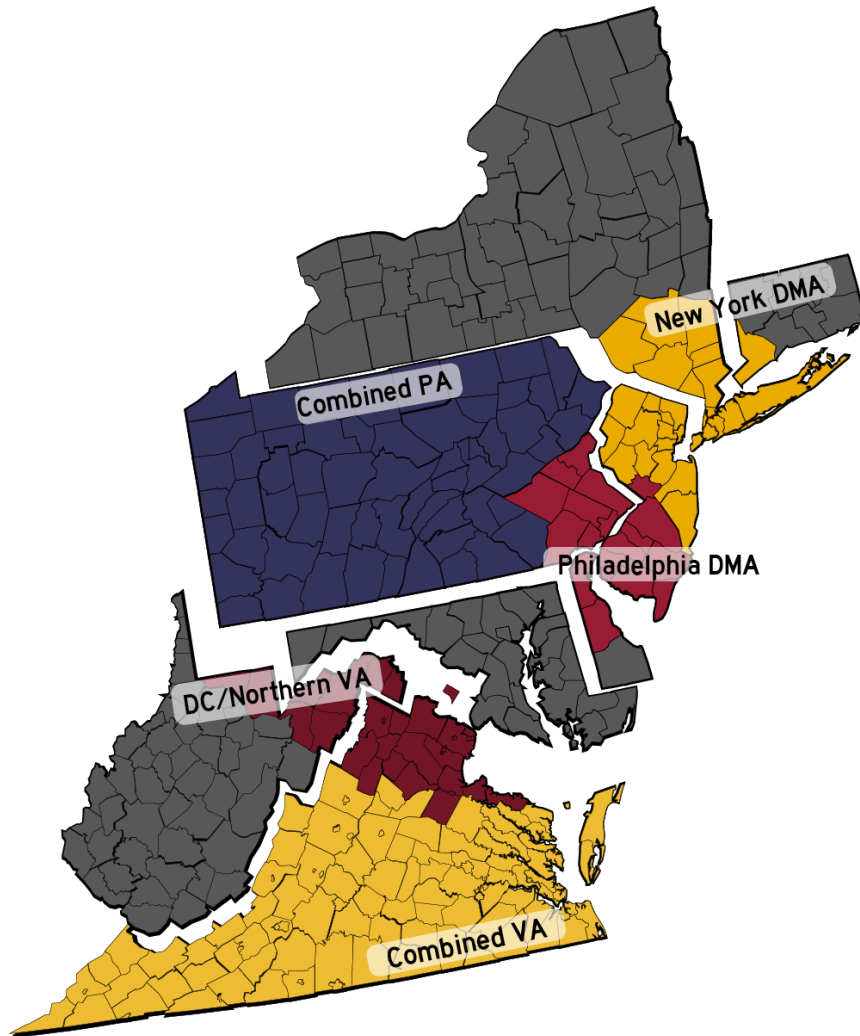
- **Regular overnight leisure travelers identifying as Hispanic or Latino** were recruited from 5 key markets.
  - Markets were chosen based on concentrations of Hispanic populations and top visitation rates of Hispanic travelers to Maryland.

- A total of **1753 responses** were collected.

	%	Count
New York	20%	353
Philadelphia	20%	350
Combined PA	20%	350
DC/NoVA	20%	350
Combined VA	20%	350

DMAs SUMMARY
n = 1753

- *In which state do you live?*
- *In which [state] county do you live?*
- *What is your zip code?*

Children in the Household

Children at home
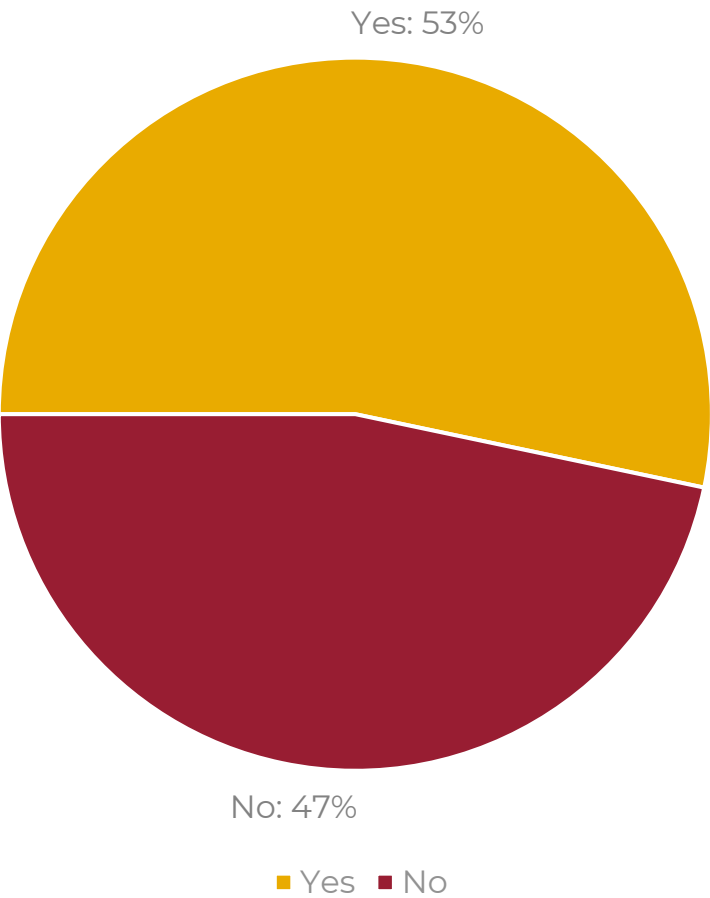
Yes: 53%

No: 47%

■ Yes ■ No

Children's ages

Age	Percentage
0-3	21%
4-7	40%
8-12	41%
13-17	31%
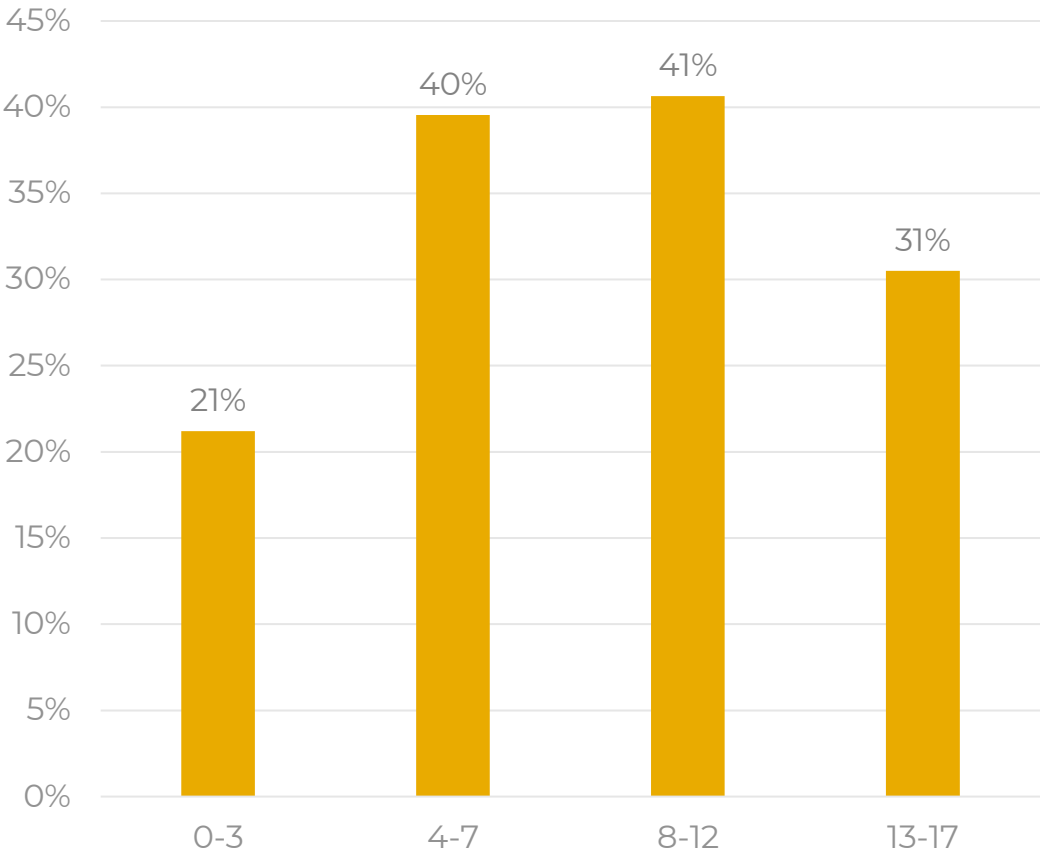
- *Do you have children (under 18) at home?*
- *What are the ages of the children in your household?*

Identity

Ancestral origin/heritage

USA	63%
Mexico	19%
Puerto Rico	16%
Spain	7%
Dominican Republic	4%
Cuba	4%
Argentina	3%
Colombia	3%
Panama	2%
Chile	2%
Peru	2%
El Salvador	2%
Guatemala	1%
Ecuador	1%
Venezuela	1%

Identity terms

Hispanic	74%
Latino/Latina	18%
Afro-Latino/Afro-Latina	5%
Latinx	0%
Latine	0%
None of the above	3%

Race/ethnicity

White or Caucasian	59%
Only identify with [identity term]	20%
Black or African-American	16%
American Indian or Alaska Native	3%
Asian or Asian-American	3%
Indigenous (including Maya, Inca, Quechua,…	2%
Middle Eastern or Northern African	1%
Only identify with country of origin*	1%
Native Hawaiian or Other Pacific Islander	1%
Mixed race/mestizo*	1%
Prefer not to answer	0%
Another option	0%

- *What is your country of ancestral origin/heritage? Select all that apply. [Top 15 countries here]*
- *With which one of these terms do you most identify? Choose one.*
- *How do you identify your race/ethnicity? Select all that apply.*
- *[Note: An * indicates a category that was added as a result of back-coding.]*

Identity: Closer look at race and ethnicity

Only identify with [identity term]

Category	Percentage
Hispanic	84%
Latino/Latina	15%
Afro-Latino/Afro-Latina	1%
Latinx	1%
Latine	0%
None of the above	0%
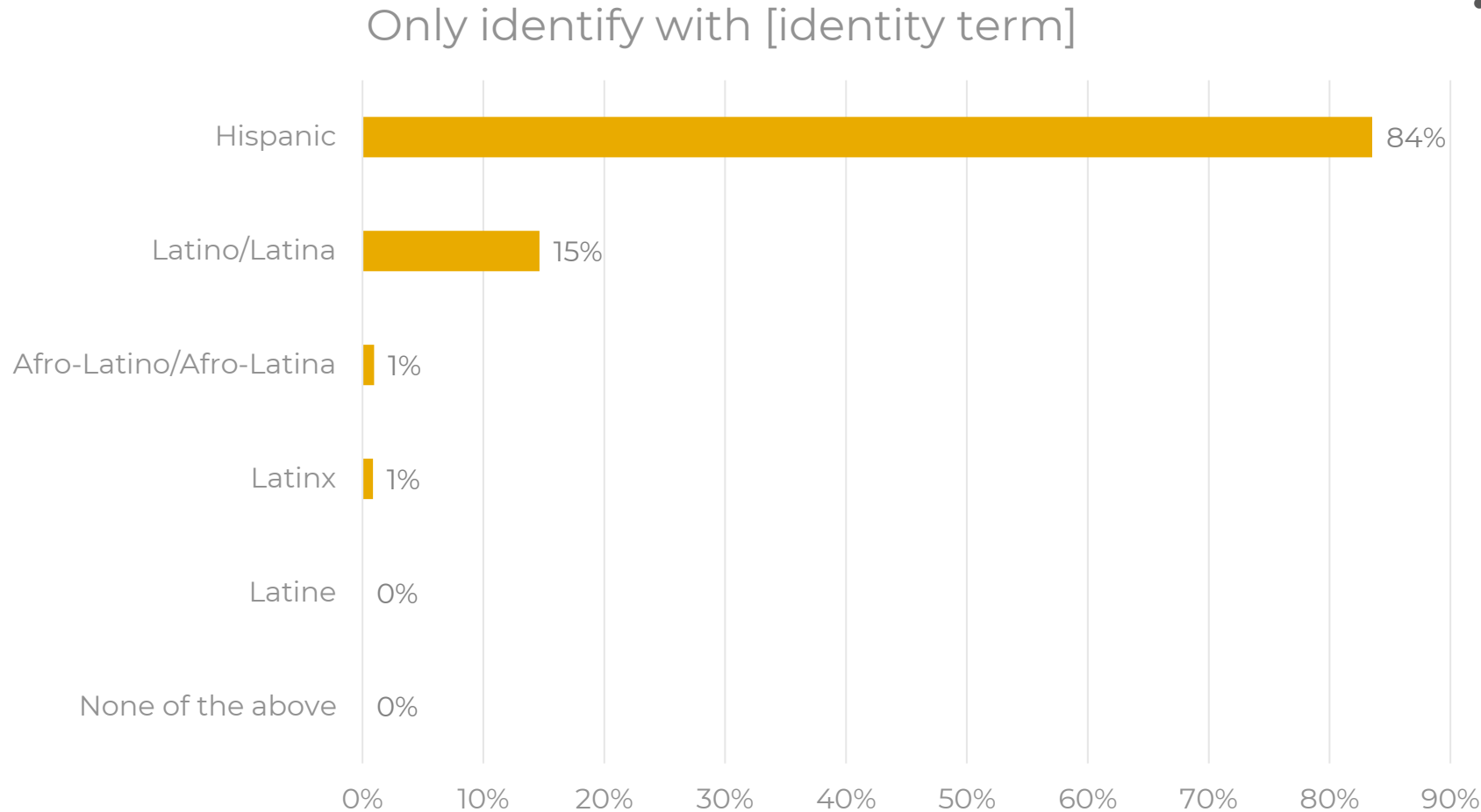
- Overall, 1 in 5 respondents reported that they only identify their race/ ethnicity with their previously selected "identity term."
  - This group primarily identified as "Hispanic" (84%).
  - This group was younger - They were significantly more likely to be Millennials/Gen Z.

Past Visitors to Maryland Identify as American

Column %	Recent Visitors n = 947	Lapsed Visitors n = 572	Non-visitors n = 234
USA	64%	66%	49% ↓
Mexico	16% ↓	20%	26% ↑
Puerto Rico	15%	16%	19%
Spain	7%	7%	5%
Dominican Republic	5%	2% ↓	8% ↑
Cuba	4%	5%	4%
Colombia	3%	2%	5%
Argentina	3%	4%	5%
El Salvador	2%	0% ↓	2%
Panama	2%	2%	1%
Ecuador	1% ↑	0%	0%
Guatemala	1%	1%	0%
Chile	1% ↓	3%	2%
Venezuela	1%	0%	1%
Peru	1%	3%	1%

Country of (ancestral) origin by Maryland RLNV
Weighted by: Generations, gender, HHI (W); N = 1705; N = 1753; some empty rows or columns have been removed

- Past visitors to Maryland are less likely to be from Mexico than non-visitors
  - Non-visitors are more likely to be from Mexico and the Dominican Republic.

Past visitors identify with the US more than any other country. Don't assume Hispanic visitors are Mexican—they likely are not.

US Residency

Born in the US

Yes: 87%

No: 13%

■ Yes ■ No
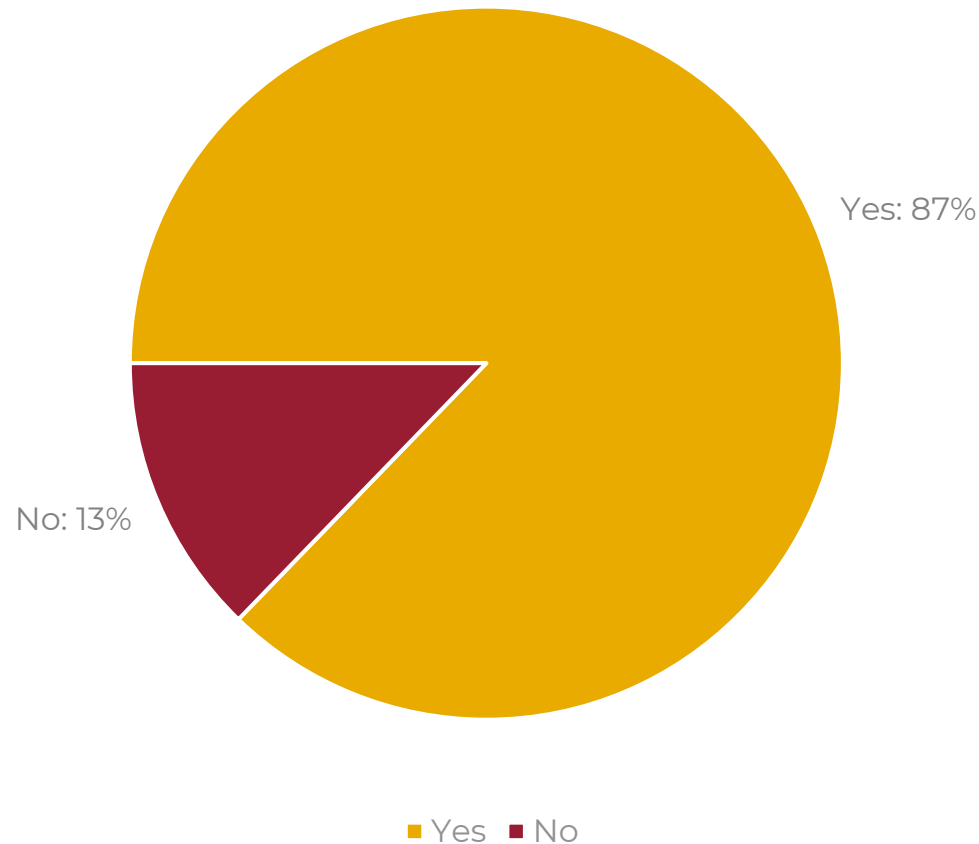
Years in the US (if not born here)

			44%
18%	21%	17%	
0-5 years	6-10 years	11-20 years	21+ years
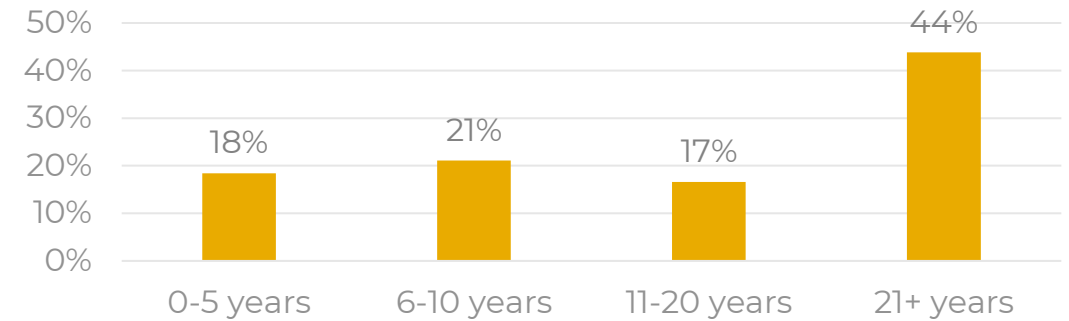
- **87% of respondents were born in the US**
  - o Of the 13% of respondents not born in the US, 44% have been in the country over 21 years.

> The sample in this survey, and Maryland's most likely Hispanic visitor, is highly acculturated.

Were you born in the US?
[If no] Approximately how many years ago did you arrive in the US?

Language Preferences
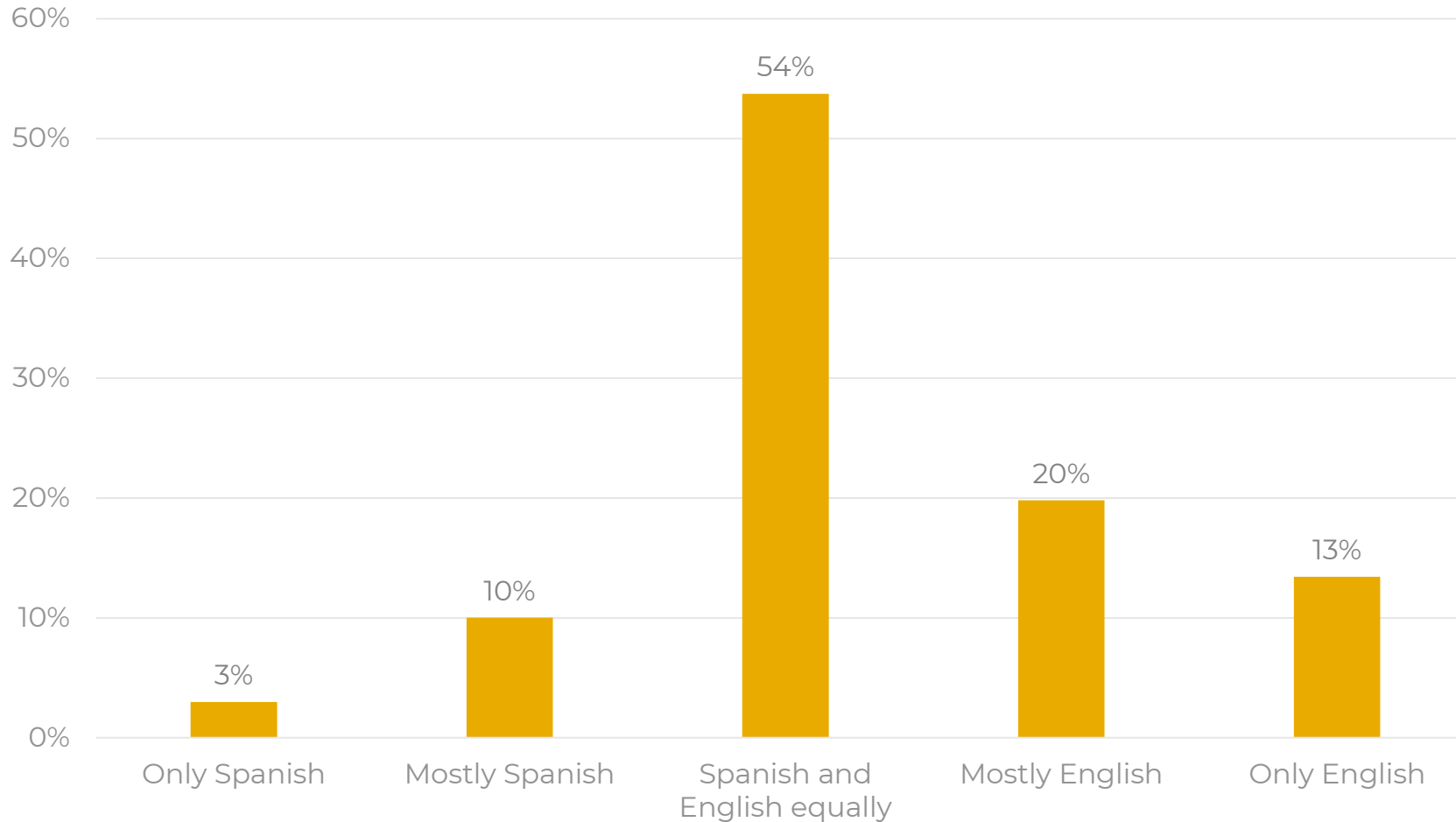
- 54% of respondents speak English and Spanish equally at home.

- Only 13% use only or mostly Spanish.

- This audience is strongly bilingual. They often use a blend of English and Spanish regularly, or "Spanglish."

- *What language do you speak most often at home?*

Trip Planning Behavior

Past Travel History
Important Planning Factors
Priorities
Resources

Summary of Hispanic Leisure Traveler Behavior

- Type/Purpose of travel for those in our study
  - 65% have been on a family vacation in the past 2 years.
  - 53% have been on a trip to visit friends or family.
  - Spending time with family and affordability are the most important factors when planning travel.
  - Travel often provides a break, reset or distraction from stress and worries.
    - For some (especially Gen Z), that means a walkable, lively city.
    - For others, it means being in the outdoors and enjoying nature (especially Millennials).
  - Safety is the #1 driver of destination choice, which was more of a concern for women and members of the LGBTQ community.
  - Feeling welcome as a Hispanic usually means a healthy/active Hispanic community, seeing people like you, and celebrations of Hispanic culture and food.

Summary of Hispanic Leisure Traveler Behavior

- Trip Inspiration & Planning Resources
  - Travelers preferred English resources because most translation is done poorly using Google Translate.
  - Younger generations often translate for their older relatives. Having Spanish-speaking staff for older generations is considered preferable to poorly translated interpretive materials.
  - Most likely to use:
    - Trip review sites (59%)
    - WOM recommendations (45%)
    - Social media posts (44%)
    - Travel deal sites (43%)
  - The most likely used social media platforms were:
    - Instagram (71%)
    - Facebook (62%)
    - YouTube (60%)
  - Video is a particularly powerful and memorable way to see and understand a destination.
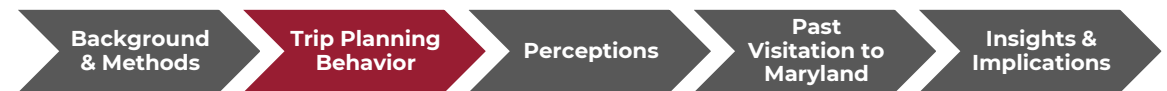
Past Leisure Trips (All Respondents)

Trip Type	Percentage
Family vacation	65%
Trip to visit friends/relatives	53%
Relaxation trip	42%
Cultural or historical trip	39%
Adventure or outdoors trip	38%
Romantic/couples getaway	37%
Trip for a family event	31%
Trip for a festival or concert	26%
Big city getaway	26%
Small-town getaway	21%
Trip for a sports event	18%
Other	1%
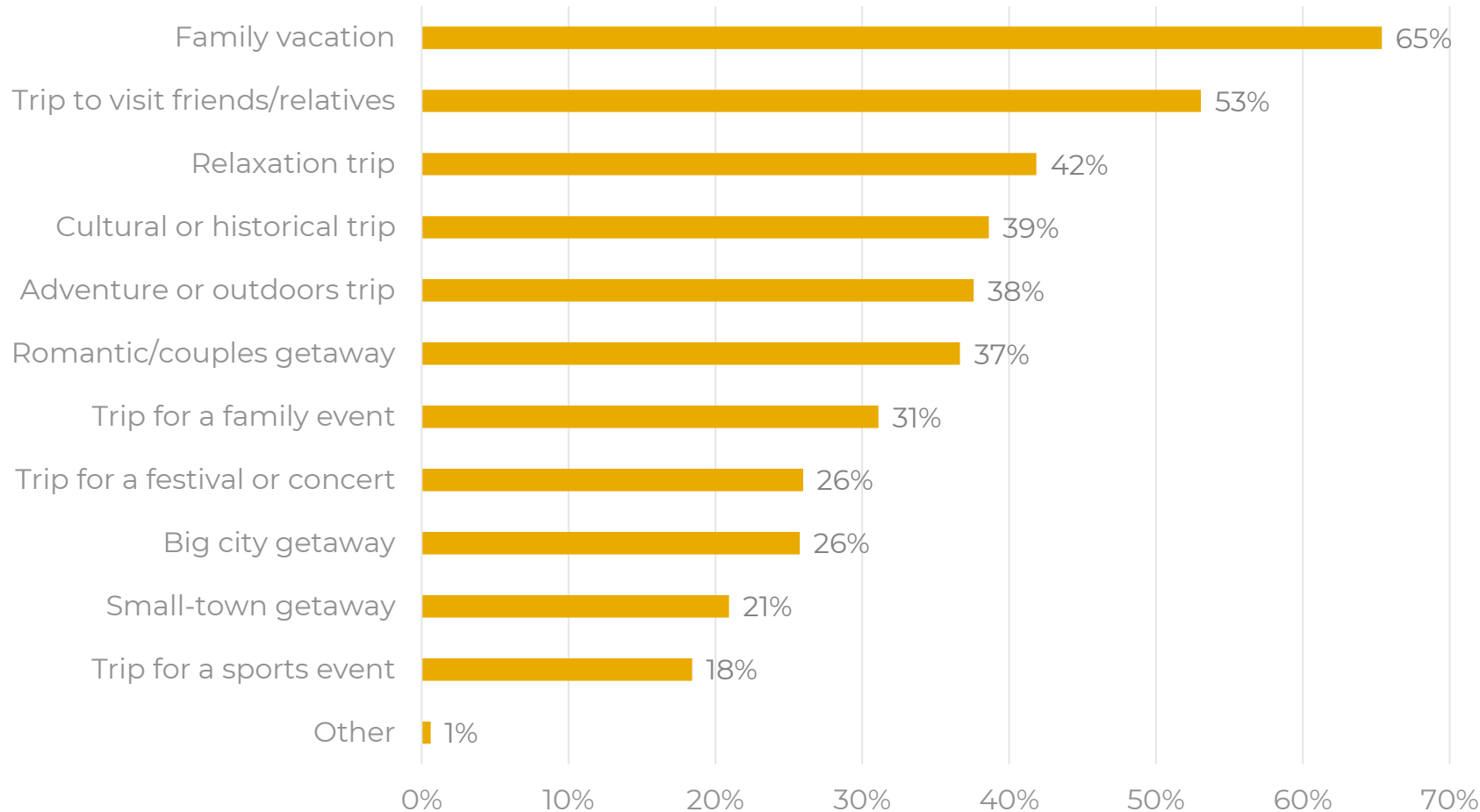
- 2 in 3 respondents had been on a family vacation in the last 2 years.
  - 1 in 3 ONLY selected family vacations.
  - Gen Z were more likely to have gone on family vacations, and Boomers were most likely to have been on relaxing trips.
- Half had visited friends/relatives.
- The "Other" responses included medical reasons and hobby-specific events (gaming, fishing, etc.).

In the past 2 years, what types of leisure trips have you taken? Select all that apply.

Important Factors in Travel Planning (All Respondents)

Average (1-5)

Factor	Chart	Average
Spending quality time with my family	6% · 91%	4.4
Affordability and budget-friendliness	8% · 89%	4.2
Traveling to a place that is seen or perceived as safe for Hispanic/Latino travelers	6% · 18% · 76%	4.1
Engaging with Hispanic/Latino culture (experiencing traditional food, celebrations, art)	6% · 25% · 70%	3.9
Interacting with people from my own cultural background	8% · 24% · 68%	3.9
Accessibility of destinations and activities for low mobility individuals	20% · 18% · 63%	3.7
Availability of Spanish resources, including staff, materials and/or services	17% · 24% · 59%	3.7
Using Latin-owned and operated hotels, resorts, businesses, or those that better Hispanic/Latino communities overall	11% · 30% · 59%	3.6

Legend: ■ Unimportant (1-2) ■ Neutral (3) ■ Important (4-5)

- Spending quality time with family was the most important factor in travel planning (4.4), followed by affordability and budget-friendliness (4.2).

- Choosing a destination perceived as safe for Hispanics was also an important factor (4.1).

- Using Latin-owned establishments was given the lowest ranking (3.6).

- *How important are each of the following to you when planning leisure travel?*
- *[Note: Respondents were shown three of these factors and asked to rate them from extremely unimportant to extremely important. All were asked about budget and about interacting with people of their own culture.]*

Background & Methods → **Trip Planning Behavior** → Perceptions → Past Visitation to Maryland → Insights & Implications

Travel Planning Priorities by Generations & Gender (All Respondents)

Average	Generations				Gender (S)	
	Gen Z	**Millennial**	**Gen X**	**Boomer**	**Man**	**Woman**
Spending quality time with my family	4.3	4.4	4.5 ↑	4.3	4.3	4.5
Traveling to a place that is seen or perceived as safe for Hispanic/Latino travelers	4.0	4.2 ↑	3.9	3.9	4.1	4.0
Engaging with Hispanic/Latino culture (experiencing traditional food, celebrations, art)	4.0	4.1 ↑	3.9	3.3 ↓	4.0 ↑	3.8 ↓
Interacting with people from my own cultural background	3.8	4.1 ↑	3.9	3.3 ↓	4.0 ↑	3.7 ↓
Availability of Spanish resources, including staff, materials and/or services	3.8	4.0 ↑	3.6	2.8 ↓	3.8 ↑	3.4 ↓
Accessibility of destinations and activities for low mobility individuals	3.7	4.0 ↑	3.7	2.9 ↓	3.8	3.5
Using Latin-owned and operated hotels, resorts, businesses, or those that better Hispanic/Latino communities overall	3.7	4.0 ↑	3.7	3.3 ↓	3.9 ↑	3.6 ↓

Travel planning priorities (avg) by Generations, gender, race/ethnicity
Weighted by: Generations, gender, HHI (W); N = from 0 to 1705; N = 1753; some empty rows or columns have been removed

- Millennials rated almost every aspect higher than other generations, showing more interest in culturally specific experiences.
  - Boomers are much less interested in these experiences.

- Spending time with family was the most important to Gen X.

- Men value engaging with their culture, interacting with other Hispanics, supporting Latin-owned businesses and having Spanish resources more than women.

- *How important are each of the following to you when planning leisure travel?*
- *[Note: Respondents were shown three of these factors and asked to rate them from extremely unimportant to extremely important. All were asked about budget and about interacting with people of their own culture.]*

Preferred Travel Resources (All Respondents)

Preferred travel resources (left chart):

Resource	Percentage
Trip review sites	59%
Recommendations from friends or family	45%
Social media posts by others/influencers	44%
Travel deal sites	43%
Google search	36%
Prior knowledge	31%
Ads on social media	30%
Travel blogs	30%
DMO websites	23%
Visitor guides/brochures (online or print)	22%
Cable or streamed TV	16%
DMO sponsored social media	15%
Newspaper/magazine advertisements	12%
Newspaper/magazine articles	12%
Other resources	0%
None of the above	1%

Preferred social media

Platform	Percentage
Instagram	71%
Facebook	62%
YouTube	60%
TikTok	36%
Pinterest	27%
X (formerly Twitter)	27%
Snapchat	23%
WhatsApp	21%
Reddit*	0%
Other	1%
None of these	4%

- Trip review sites (like Tripadvisor) were the most common preferred resource (59%), followed by friends/family recommendations (45%).

- 96% of the respondents used some sort of social media.
  - Instagram was the most popular (71%), followed by Facebook (62%) and YouTube (60%).

Resources by Generations, Gender & Race/Ethnicity

Column %	Generations				Gender (S)		Race/Ethnicity (S)		
	Gen Z n = 280	Millennial n = 684	Gen X n = 456	Boomer n = 333	Man n = 877	Woman n = 877	White n = 1037	Black/ African- American n = 287	Only [Identity Term] n = 344
Trip review sites	62%	53% ↓	62%	65%	57%	62%	59%	69% ↑	53%
Travel deal sites	36% ↓	40%	49% ↑	46%	39% ↓	47% ↑	43%	46%	43%
Recommendations from friends or family	49%	34% ↓	53% ↑	50%	34% ↓	55% ↑	46%	41%	46%
Social media posts by others/influencers	56% ↑	44%	43%	36%	42%	46%	41% ↓	52% ↑	43%
Whatever comes up when I do a Google search	42%	39%	39%	20% ↓	37%	35%	35%	37%	38%
Ads on social media	23% ↓	36% ↑	31%	20%	34% ↑	26% ↓	31%	32%	28%
Prior knowledge	32%	22% ↓	32%	47% ↑	26% ↓	36% ↑	30%	31%	36%
Travel blogs	29%	30%	31%	27%	28%	31%	28%	30%	32%
Destination/visitor/tourism organization websites	22%	19% ↓	24%	29%	19% ↓	26% ↑	25%	25%	18%
Visitor/tourism guide/brochures (online or print)	16% ↓	17% ↓	23%	39% ↑	23%	22%	23%	22%	22%
Cable or streamed TV	10% ↓	19% ↑	18%	12%	19% ↑	12% ↓	16%	17%	14%

- Gen Z tends to be more likely to utilize social media than other generations.
- Millennials tend to be more likely to say that ads on social media and streamed TV are useful for travel planning.
- Boomers tend to be more likely to use prior knowledge and visitor guides/brochures.

Resources (coded) by Generations, gender, race/ethnicity
Weighted by: Generations, gender, HHI (W); N = 1705; N = 1753

Background & Methods | **Trip Planning Behavior** | Perceptions | Past Visitation to Maryland | Insights & Implications

Compared to the 2021 Predictive Analytics Study

Rank of Resources	2021 Travel Intent Study	2025 Hispanic Traveler Study
1	Prior knowledge	Trip review sites
2	Word of mouth	Word of mouth
3	Trip review sites	Social media
4	Internet/ Google	Travel deal sites
5	Social media	Internet/ Google
6	Travel deal sites	Prior knowledge

- Compared to the general traveler audience sampled in the 2021 Predictive Analytics study, Hispanic leisure travelers are more likely to use trip review sites and social media, and less likely to use prior knowledge to research destinations and plan travel.

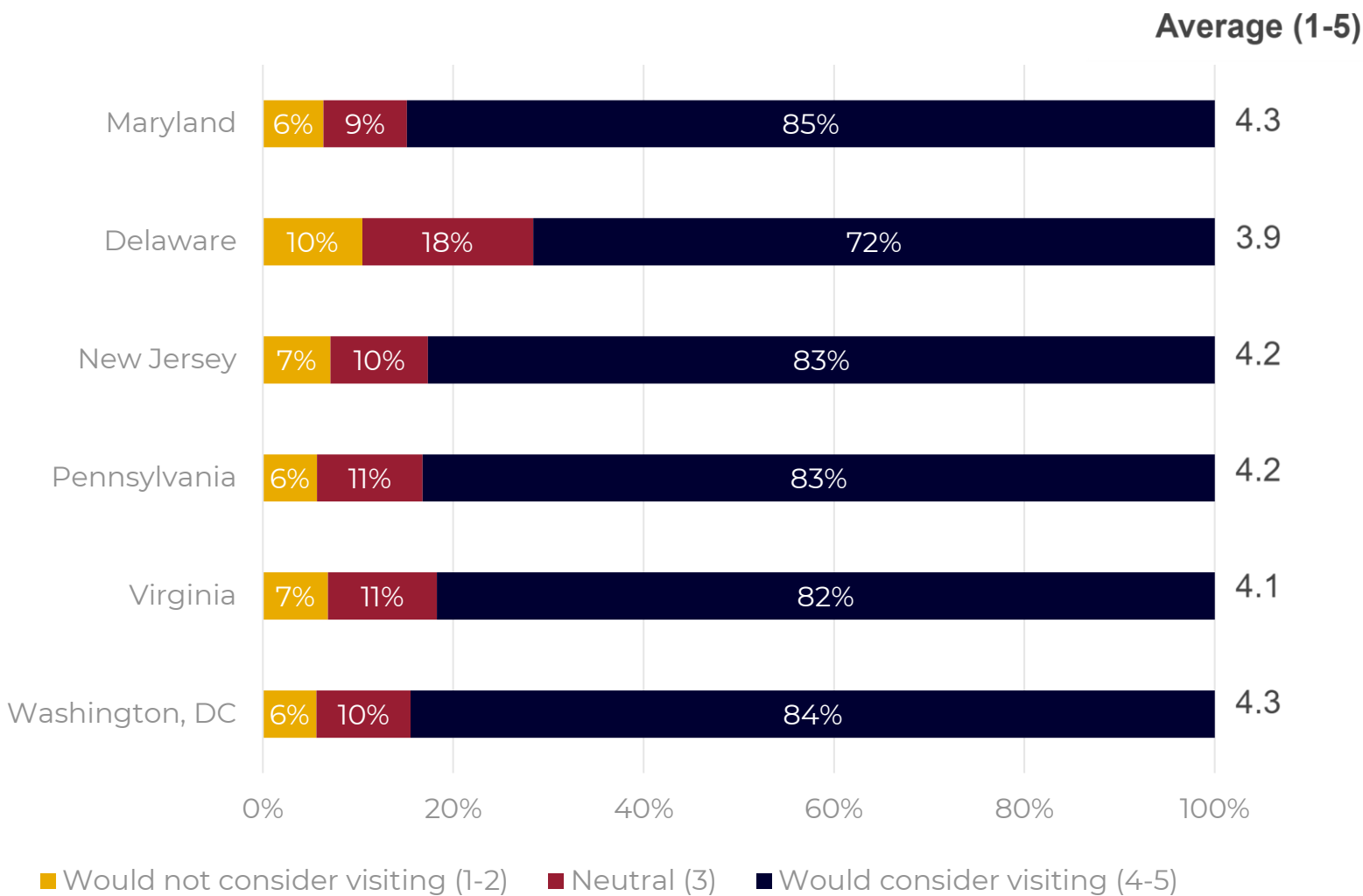# Perceptions

Competitor States
Maryland Overall
Maryland's Regions

Summary of Hispanic Leisure Traveler Perceptions (All Respondents)

- MD vs. Competitor States
  - Of 6 nearby states, MD and DC were the most likely to be considered for future travel. MD, PA, NJ and DC were the most visited states. VA and DE were the least likely to be visited.
  - As a reminder, participants were from VA, PA, NY and NJ.

- Perceptions of MD
  - Unaided, respondents thought of Baltimore, crabs, the Chesapeake Bay, beaches, seafood and more.
  - Aided, the strongest Maryland association was with seafood/crabs (35%). A quarter also thought of history and heritage, the Chesapeake Bay and beaches.
  - Focus group participants considered Maryland to be slow, calm, relaxed, welcoming. Its image was generally positive, except for some who considered it not exciting enough.
  - Many only hear about Baltimore or Ocean City and aren't aware of other parts of the state.

- Appealing vs. Not Appealing
  - 90% agreed that MD has attractions and activities that they find appealing. 88% agreed that MD is a safe state and 87% agreed that MD is welcoming to the Hispanic community.
  - Past visitor families say MD has a lot to do, and some talk about the vibrant Hispanic communities.
  - Respondents are most likely to hear others talk about MD in terms of Ocean City, the beach and seafood/crabs.
  - Seafood, beaches and waterfront, and a slow, quiet pace are what most first associate with MD.
  - Travelers were most familiar with the Capital Region, Central MD and the Lower Eastern Shore.

Likelihood of Future Visits (All Respondents)

Average (1-5)

State	Would not consider visiting (1-2)	Neutral (3)	Would consider visiting (4-5)	Average
Maryland	6%	9%	85%	4.3
Delaware	10%	18%	72%	3.9
New Jersey	7%	10%	83%	4.2
Pennsylvania	6%	11%	83%	4.2
Virginia	7%	11%	82%	4.1
Washington, DC	6%	10%	84%	4.3

■ Would not consider visiting (1-2)   ■ Neutral (3)   ■ Would consider visiting (4-5)

- MD and DC were the most desired destinations on average (4.3 respectively).

- 6% of respondents would <u>not</u> consider visiting MD in the future.
    - *NOTE: Those respondents were disqualified after this question.*

- DE was the least considered destination (3.9).

How likely is it that you would consider traveling to each state for an overnight leisure visit in the near future (2-3 years)? [asked BEFORE revealing Maryland as the study topic]

Past Visitation (All Respondents)

Visitors (Recent & Lapsed)

State	Never visited	2021 or before	2022 or later	Visitors (Recent & Lapsed)
Maryland	13%	33%	54%	87%
Delaware	28%	39%	34%	72%
New Jersey	14%	31%	55%	86%
Pennsylvania	13%	37%	50%	87%
Virginia	19%	43%	38%	81%
Washington, DC	14%	38%	48%	86%

■ Never visited (Non-visitors)   ■ 2021 or before (Lapsed visitors)   ■ 2022 or later (Recent visitors)
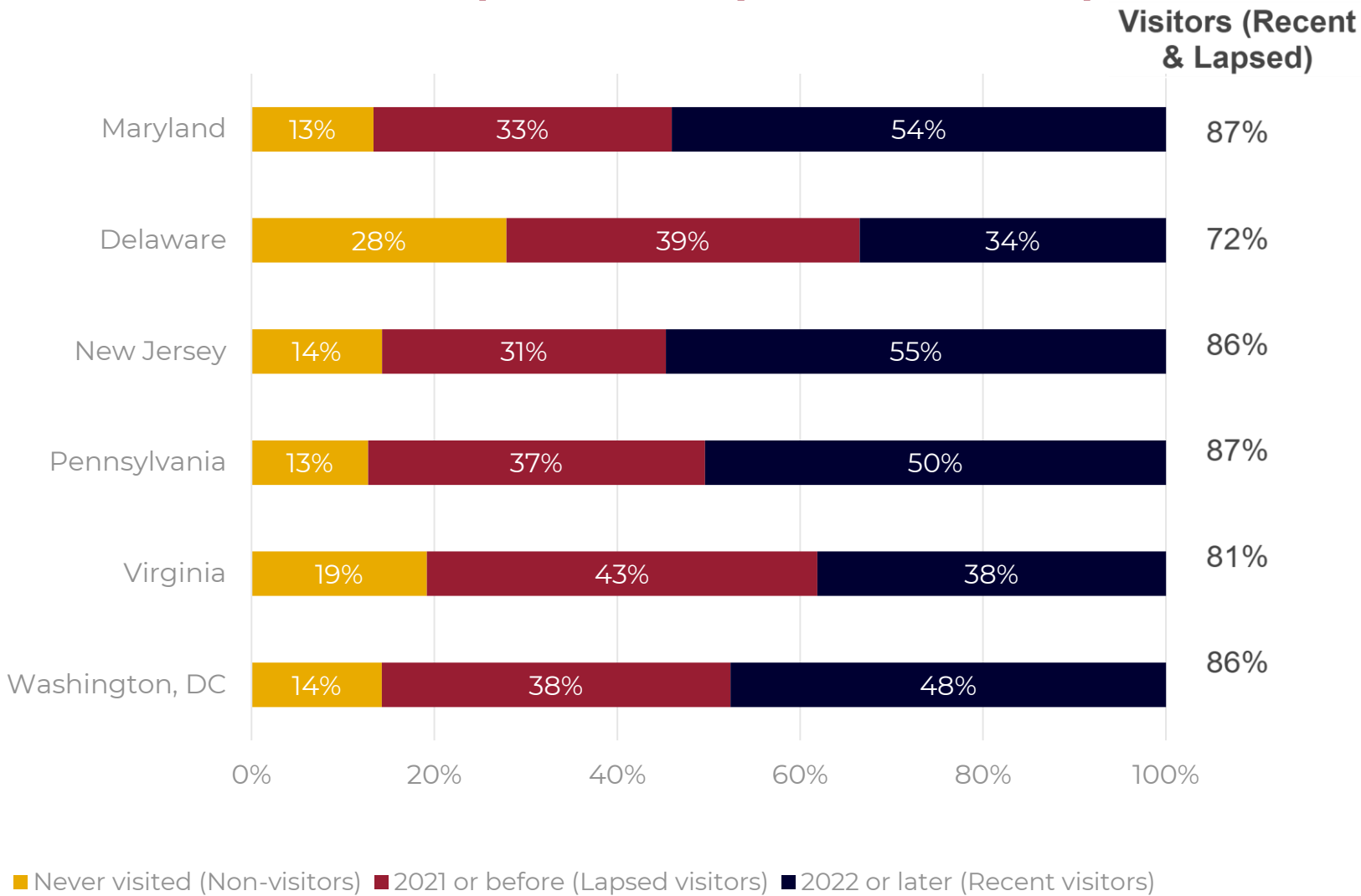
- MD and PA were the most likely states visited (87% respectively).
  - MD and NJ had the most recent visitors; VA had the most lapsed visitors.

- *Which of the following have you visited for leisure in the past 2-3 years?*
- *For each state/district, please select whether you have visited in the past, visited recently, or have never visited. [asked BEFORE revealing Maryland as the study topic]*

Background & Methods | Trip Planning Behavior | Perceptions | Past Visitation to Maryland | Insights & Implications

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Unaided Perceptions of Maryland (All Respondents)
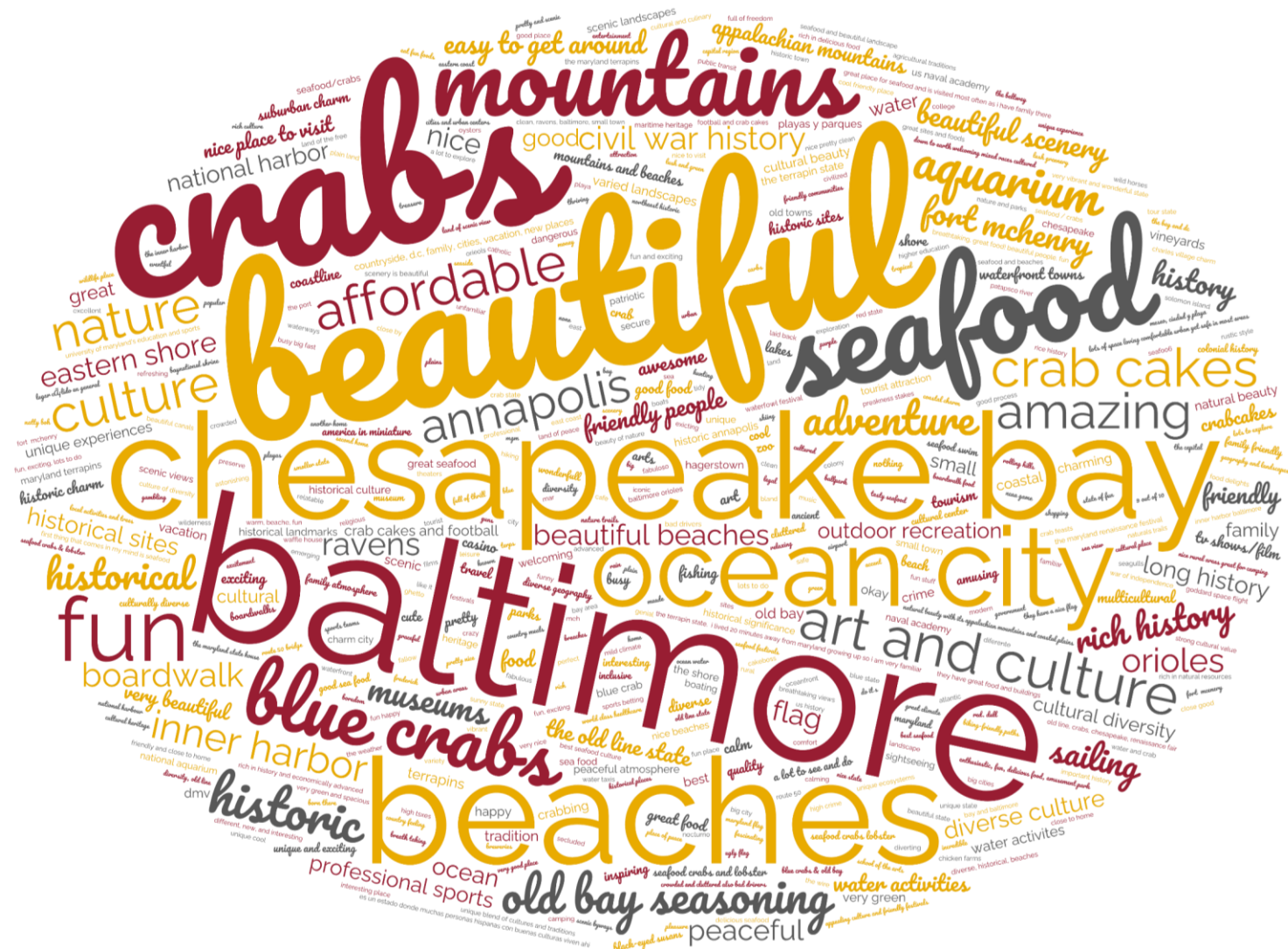
- *Please share a few words or phrases that first come to mind when you think of the state of Maryland overall.*

Aided Perceptions (All Respondents)

Category	Percentage
Seafood/Crabs	35%
History & heritage	26%
Chesapeake Bay	25%
Beaches	25%
Unique experiences	19%
Great food/culinary scene	18%
Affordable	17%
Water activities	16%
A lot to see and do	14%
Arts & culture	14%
Varied landscapes	13%
Easy to get around	13%
Waterfront towns	13%
Outdoor recreation	13%
Mountains	12%
Professional sports	10%
Farms and agriculture	8%
TV shows/film	7%
Other	1%

- Respondents first thought of seafood and crabs when thinking of Maryland (35%).

- They also thought of history and heritage (26%), the Chesapeake Bay (25%) and beaches (25%).

- They were less likely to think of sports (10%), farms (8%) and TV shows/films (7%).

Which of the following words or phrases come to mind when you think of the state of Maryland? Please select your top 3.

Perceptions Often Differed by Age, Gender and Race

Column %	Generations				Gender (S)		Race/Ethnicity (S)		
	Gen Z n = 280	Millennial n = 684	Gen X n = 456	Boomer n = 333	Man n = 877	Woman n = 877	White n = 1037	Black/African-American n = 287	Only [Identity Term] n = 344
Beaches	26%	27%	24%	21%	23%	27%	25%	20%	29%
Seafood/Crabs	35%	26% ↓	40% ↑	44%	28% ↓	41% ↑	32% ↓	42% ↑	37%
History & heritage	22%	22% ↓	33% ↑	29%	27%	26%	27%	28%	26%
Unique experiences	18%	21%	15%	20%	20%	18%	19%	22%	16%
Chesapeake Bay	18% ↓	21% ↓	28%	36% ↑	22%	28%	27%	21%	20%
Affordable	21%	20%	17%	9%	18%	17%	16%	22%	19%
Great food/culinary scene	16%	18%	18%	21%	18%	18%	18%	17%	17%
Arts & culture	13%	17% ↑	15%	7%	15%	13%	14%	17%	14%
Water activities	15%	17%	14%	21%	18%	14%	18%	18%	13%
Mountains	14%	15% ↑	11%	6%	16% ↑	8% ↓	12%	8% ↓	13%
Outdoor recreation	11%	15%	11%	13%	13%	12%	15% ↑	10%	11%
Varied landscapes	11%	14%	10%	18%	12%	14%	14%	9%	14%
Easy to get around	19% ↑	13%	15%	5% ↓	15%	12%	11% ↓	16%	17%
A lot to see and do	13%	12%	9% ↓	26% ↑	12%	16%	15%	11%	12%
Waterfront towns	12%	12%	14%	14%	13%	13%	13%	11%	15%
Professional sports	14%	12%	10%	4%	13% ↑	7% ↓	10%	10%	8%
Farms and agriculture	10%	9%	10%	2% ↓	8%	8%	7%	8%	10%
TV shows/film	11% ↑	8% ↑	5%	2%	8% ↑	5% ↓	5% ↓	10% ↑	8%
Other	2%	0%	0%	2%	1%	1%	1%	1%	2%

Aided perceptions: MD by Generations, gender, race/ethnicity
Weighted by: Generations, gender, HHI (W); N = 1705; N = 1753

- Associations with seafood and crabs were most common among Gen X, women and Black travelers.

- History and heritage associations were most common among Gen X.

- Associations with the Chesapeake Bay were strongest among Boomers.

- *Which of the following words or phrases come to mind when you think of the state of Maryland? Please select your top 3.*

Perceptions Also Sometimes Differed by Geography

Column %	New York n = 411	Philadelphia n = 390	Combined PA n = 337	DC/NoVA n = 317	Combined VA n = 299
Seafood/Crabs	34%	39%	31%	36%	32%
Chesapeake Bay	23%	28%	23%	23%	28%
History & heritage	23%	26%	32%	24%	26%
Affordable	21%	14%	16%	17%	18%
Unique experiences	21%	18%	21%	20%	13% ↓
Varied landscapes	19% ↑	9% ↓	10%	14%	14%
Beaches	18% ↓	33% ↑	25%	25%	23%
Great food/culinary scene	17%	21%	17%	17%	20%
Easy to get around	15%	9% ↓	14%	13%	14%
Outdoor recreation	15%	17%	11%	11%	8% ↓
Waterfront towns	14%	10%	11%	15%	14%
A lot to see and do	14%	16%	17%	12%	12%
Arts & culture	14%	10% ↓	15%	15%	19%
Water activities	13%	20%	20%	11% ↓	17%
Professional sports	12%	5% ↓	10%	13% ↑	9%
Mountains	9%	7% ↓	17% ↑	14%	14%
Farms and agriculture	9%	8%	7%	8%	8%
TV shows/film	6%	7%	3% ↓	9%	8%
Other	0%	3% ↑	0%	1%	1%

Aided perceptions: MD by DMAs
Weighted by: Generations, gender, HHI (W); n = 1705; N = 1753

- Travelers from New York were more likely than other markets to associate MD with varied landscapes, while Philadelphia travelers were more likely to associate it with beaches.

- DC/Northern VA travelers thought more about professional sports, while PA outside of Philadelphia thought of mountains.

- *Which of the following words or phrases come to mind when you think of the state of Maryland? Please select your top 3.*

Compared to 2021 Predictive Analytics

Rank of Aided Perceptions	2021 Travel Intent Study	2025 Hispanic Traveler Study
1	Seafood/crabs	Seafood/crabs
2	Chesapeake Bay	History & heritage
3	Beaches	Chesapeake Bay
4	Waterfront Towns	Beaches
5	History & heritage	Unique experiences

- Hispanic leisure travelers think about Maryland in similar ways as the general traveler audience sampled in the 2021 Predictive Analytics study.

- Seafood and crabs are the #1 association.

- Hispanic leisure travelers think more about history and heritage, and general travelers think about waterfront towns.

Maryland Perception Ratings (All Respondents)

Average (1-5)

Maryland has attractions and activities that I find appealing — 9% | 90% — 4.3

Maryland is a state I feel safe visiting — 10% | 88% — 4.3

I think Maryland is welcoming to the Hispanic/Latino community — 12% | 87% — 4.2

I am well-informed about things to do and places to go for leisure in Maryland — 12% | 84% — 4.2

I have heard others in Hispanic/Latino communities saying positive things about visiting Maryland for leisure — 15% | 82% — 4.1

0% 20% 40% 60% 80% 100%

■ Disagree (1-2) ■ Neutral (3) ■ Agree (4-5)

- Generally, respondents found that MD has appealing attractions and activities (90% agree).
  - Millennials and men tended to give higher ratings while Gen Z, Boomers and women tended to give lower ratings.
- Most also felt safe visiting MD (88%).

Consider communicating with Gen Z in a way that encourages them to come visit with their families as they move into their next life stage.

- *To what extent do you agree with the following statements?*

Background & Methods | Trip Planning Behavior | Perceptions | Past Visitation to Maryland | Insights & Implications

Maryland's Tourism Regions
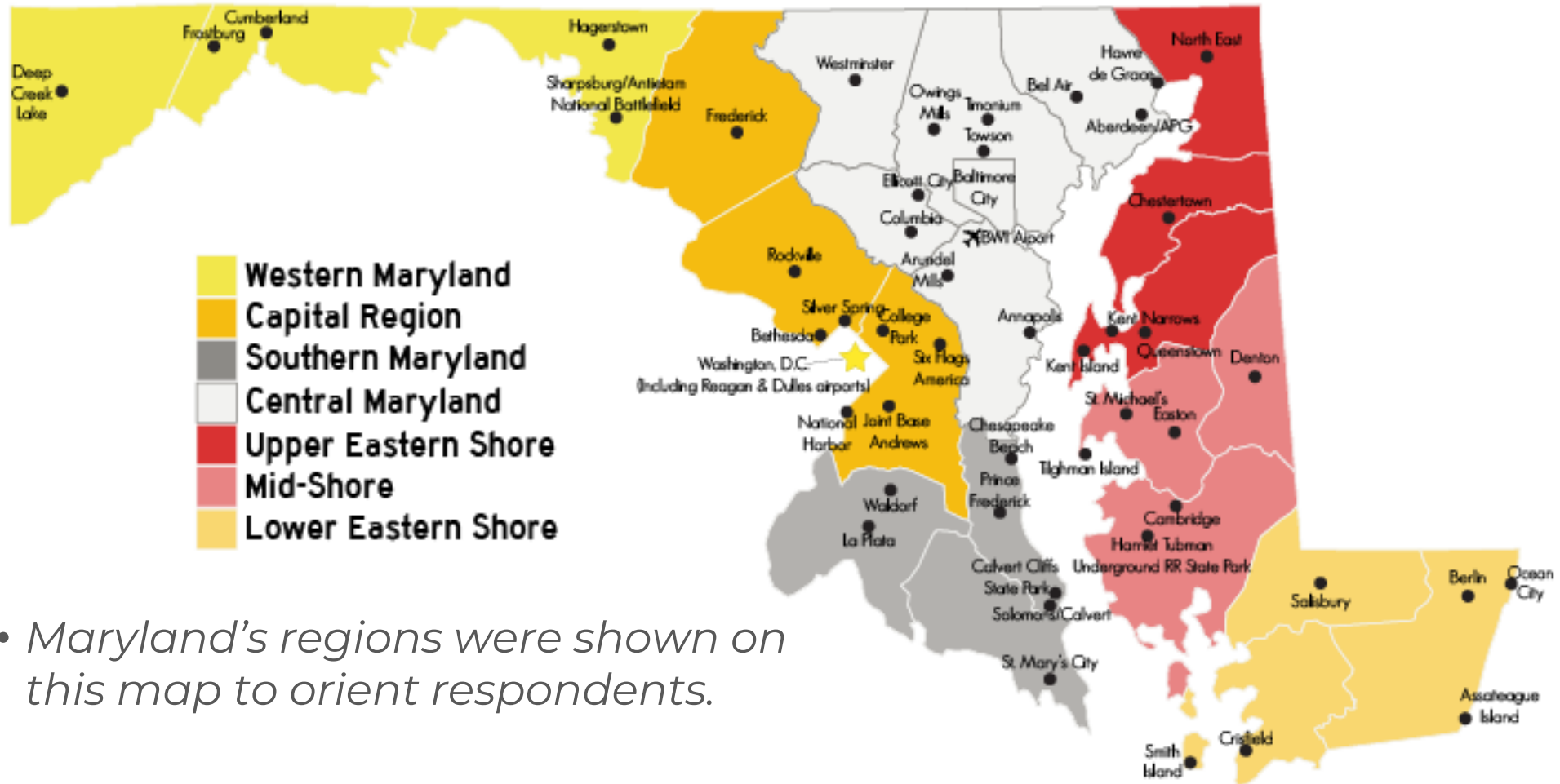
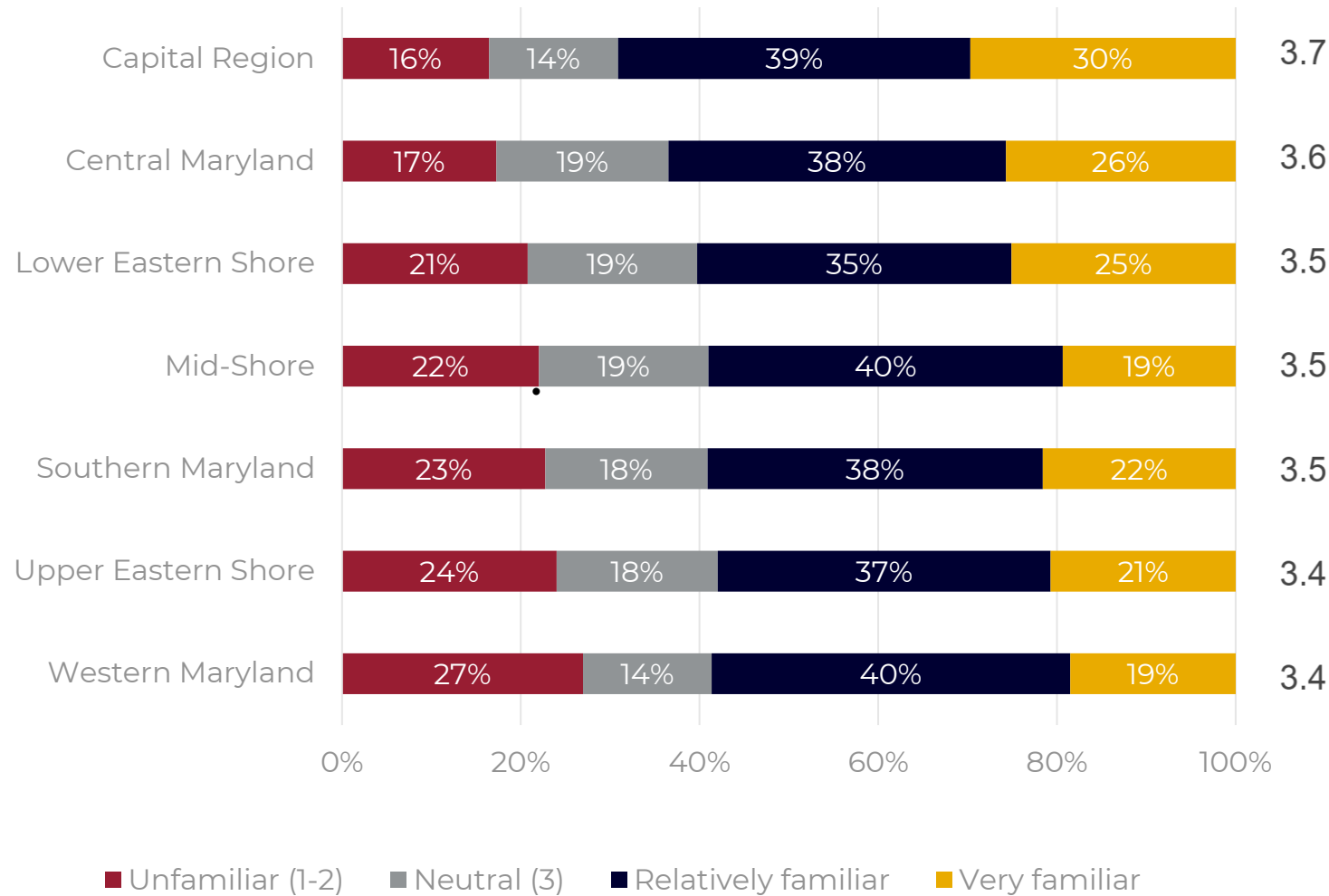- *Maryland's regions were shown on this map to orient respondents.*

Familiarity: Regions (All Respondents)

Average (1-5)

Region	Unfamiliar (1-2)	Neutral (3)	Relatively familiar	Very familiar	Average
Capital Region	16%	14%	39%	30%	3.7
Central Maryland	17%	19%	38%	26%	3.6
Lower Eastern Shore	21%	19%	35%	25%	3.5
Mid-Shore	22%	19%	40%	19%	3.5
Southern Maryland	23%	18%	38%	22%	3.5
Upper Eastern Shore	24%	18%	37%	21%	3.4
Western Maryland	27%	14%	40%	19%	3.4

0% 20% 40% 60% 80% 100%

- Unfamiliar (1-2)
- Neutral (3)
- Relatively familiar
- Very familiar

- Respondents weren't very familiar with specific regions within Maryland.

- That said, they were most familiar with the Capital Region (3.9) and least familiar with the Upper Eastern Shore (3.6).

- Millennials and men tended to be more familiar with all regions while Gen Z and women tended to be less familiar.

- *How familiar would you say you are with things to see and do in each of Maryland's 7 regions?*

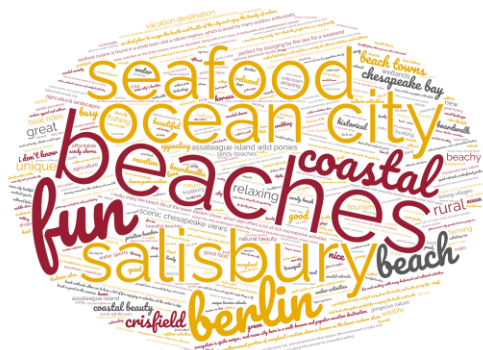# Unaided perceptions: Regions (All Respondents)

Western

Capital

Central

Southern

Lower Shore

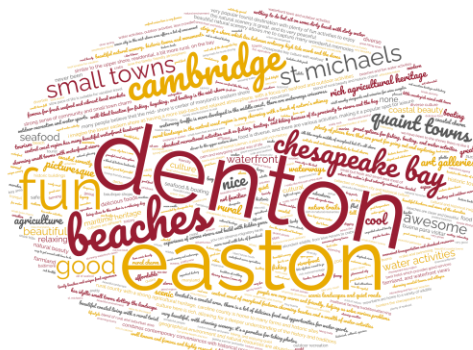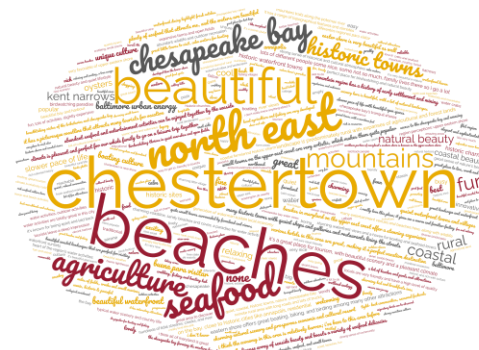Mid-Shore

Upper Shore

- *For each of the Maryland regions listed below, how would you describe it in a few words?*
- *[NOTE: respondents were only asked to describe regions they were neutral to familiar with. They were only shown up to three options each.]*

Past Visitation to Maryland

History
Most Recent Trip Details
Net Promoter Score (NPS)
Reasons for Not Visiting
Potential Trip Motivators

Summary of Past Visitation to Maryland

- 54% of respondents had visited MD recently (past 3 years). 33% have visited, but not since at least 2021. 13% had never visited.
  - 42% of recent visitors were Millennials; 24% were Gen X; 18% were Boomers; 15% were Gen Z.

- On average, past visitors have been 3.5 times; spring and summer were the most popular times to visit.

- Most had recently visited the Capital Region (35%) and Central MD (29%). 24% had visited Western MD.

- Typical activities included shopping (41%), beach (40%) and eating local seafood (37%). Visitors had most recently visited MD to visit friends and family (29%) or for a family vacation (28%).
  - Family vacationers are most likely to visit the beach (51%), while family visitors are most likely to go shopping (51%).

- Trip parties typically included spouses (66%) and kids (53%).

- 83% stayed the night (3.2 nights), 62% of those in a hotel. Family groups tend to drive, while singles and friend groups tend to fly.

- Overall Net Promoter Score (NPS) was a high 61.6.
  - Recent visitors, NY and VA visitors, and Millennials scored MD higher while lapsed visitors and those from PA scored MD lower.

- Satisfaction and appeal of MD was dependent on life stage – Millennials, seeking a family destination, found MD more appealing and were more satisfied visiting MD than Gen Z – looking for something more exciting.

Past Visitation: MD (All Respondents)

Visitation

Recent Visitors: 54%

Lapsed Visitors: 33%

Non-visitors: 13%

■ Recent Visitors ■ Lapsed Visitors ■ Non-visitors
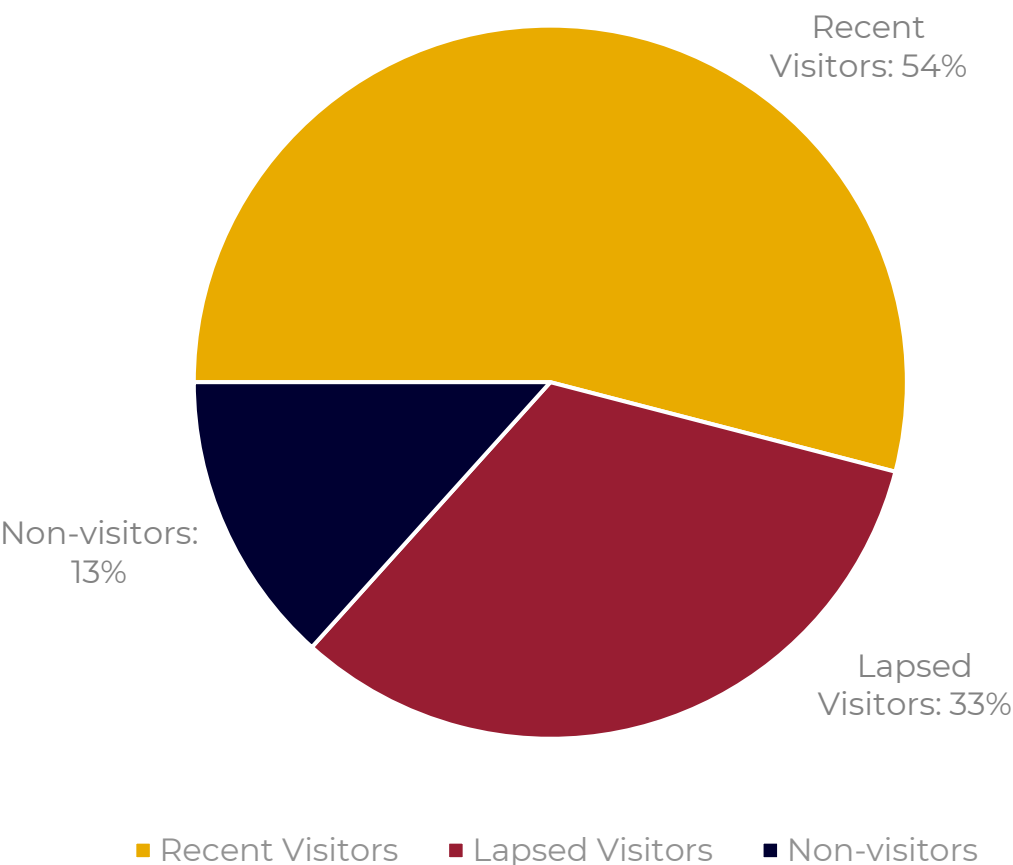
Repeat Visitation (Recent & Lapsed)

Just once	2	3	4	5	6-10	>10 times	Only daytrip or pass-through
17%	31%	21%	14%	7%	6%	3%	2%
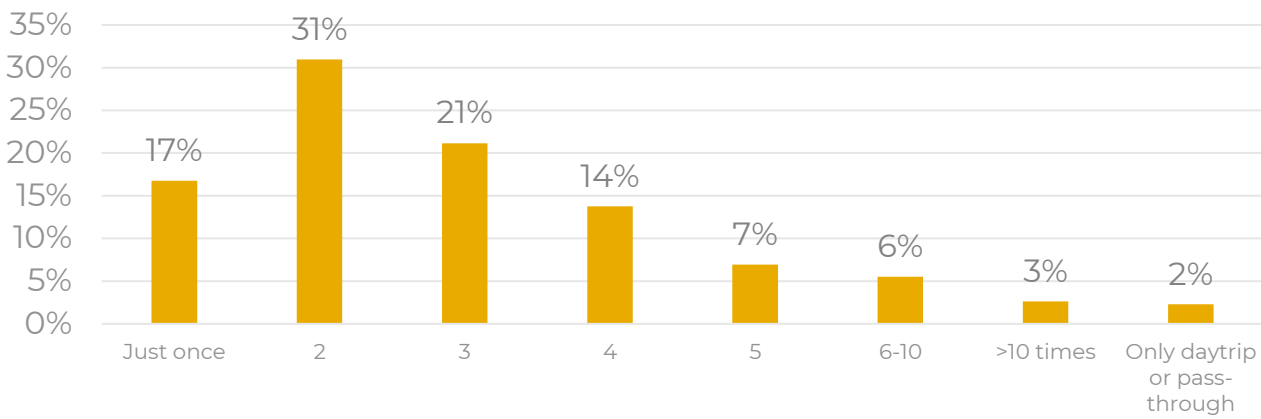
- 54% have visited MD recently, 33% haven't visited since 2021 and 13% have never visited.
  - Recent repeat visitors have visited an average of 3.5 times.
- DC and Northern VA had more recent visitors; NY had more Lapsed and Non-visitors.
- This past visitation rate is approximately 10 points higher than that measured in the 2021 Predictive Analytics study.

- *Which of the following have you visited for leisure in the past 2-3 years? For each state/district, please select whether you have visited in the past, visited recently, or have never visited.*
- *How many times have you visited Maryland for a leisure trip since 2022?*

Background & Methods ▶ Trip Planning Behavior ▶ Perceptions ▶ **Past Visitation to Maryland** ▶ Insights & Implications

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Month of Visit (Recent Visitors)
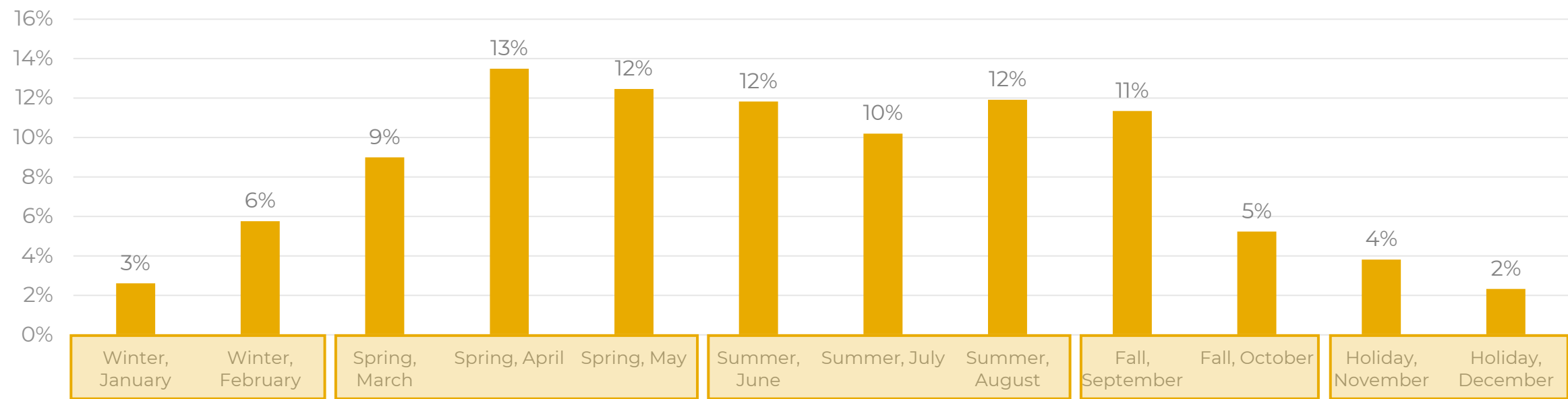
- 52% of recent visitors came during 2024.
- About 1/3 visited during the spring, and another 1/3 in the summer seasons.
  - Seasonal visitation is very consistent year to year, with a slight holiday bump up in 2023.

When was your most recent leisure trip to Maryland? Please choose the month and year.

Regions Visited & Primary Destination (Recent Visitors)

Horizontal bar chart — Regions visited:
- Capital Region: 35%
- Central Maryland: 29%
- Western Maryland: 24%
- Southern Maryland: 22%
- Upper Eastern Shore: 15%
- Lower Eastern Shore: 14%
- Mid-Shore: 13%
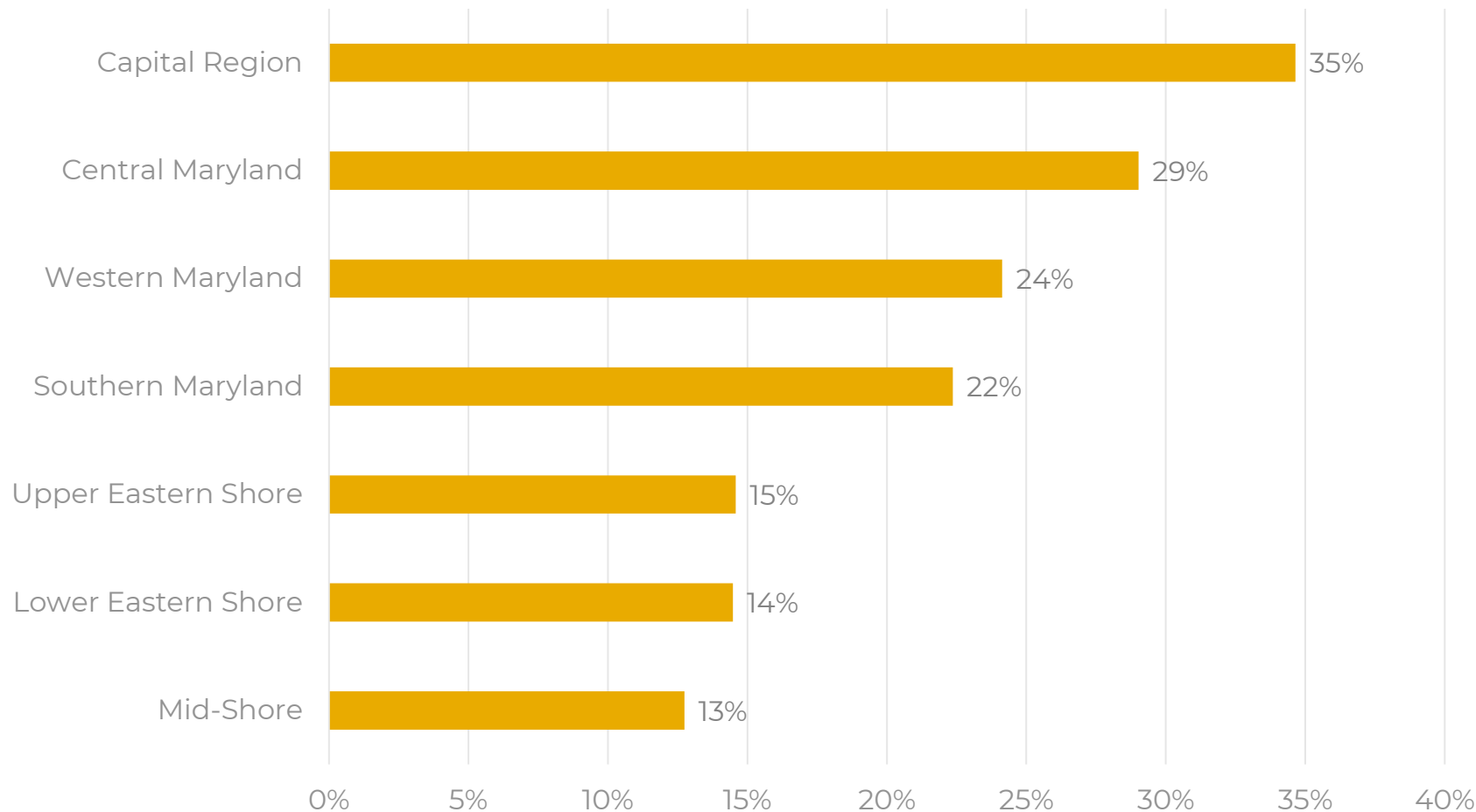
- Most recent visitors had gone to the Capital Region (35%), followed by Central Maryland (29%).

- They are significantly less likely to have visited the Lower Eastern Shore than the general traveler in the 2021 Predictive Analytics study.

- Millennials and men were more likely to have visited Western MD.

- New Yorkers are more likely to visit the Capital Region.

• *Where did you go on your [MONTH] [YEAR] trip?*

Primary Purpose (Recent Visitors)

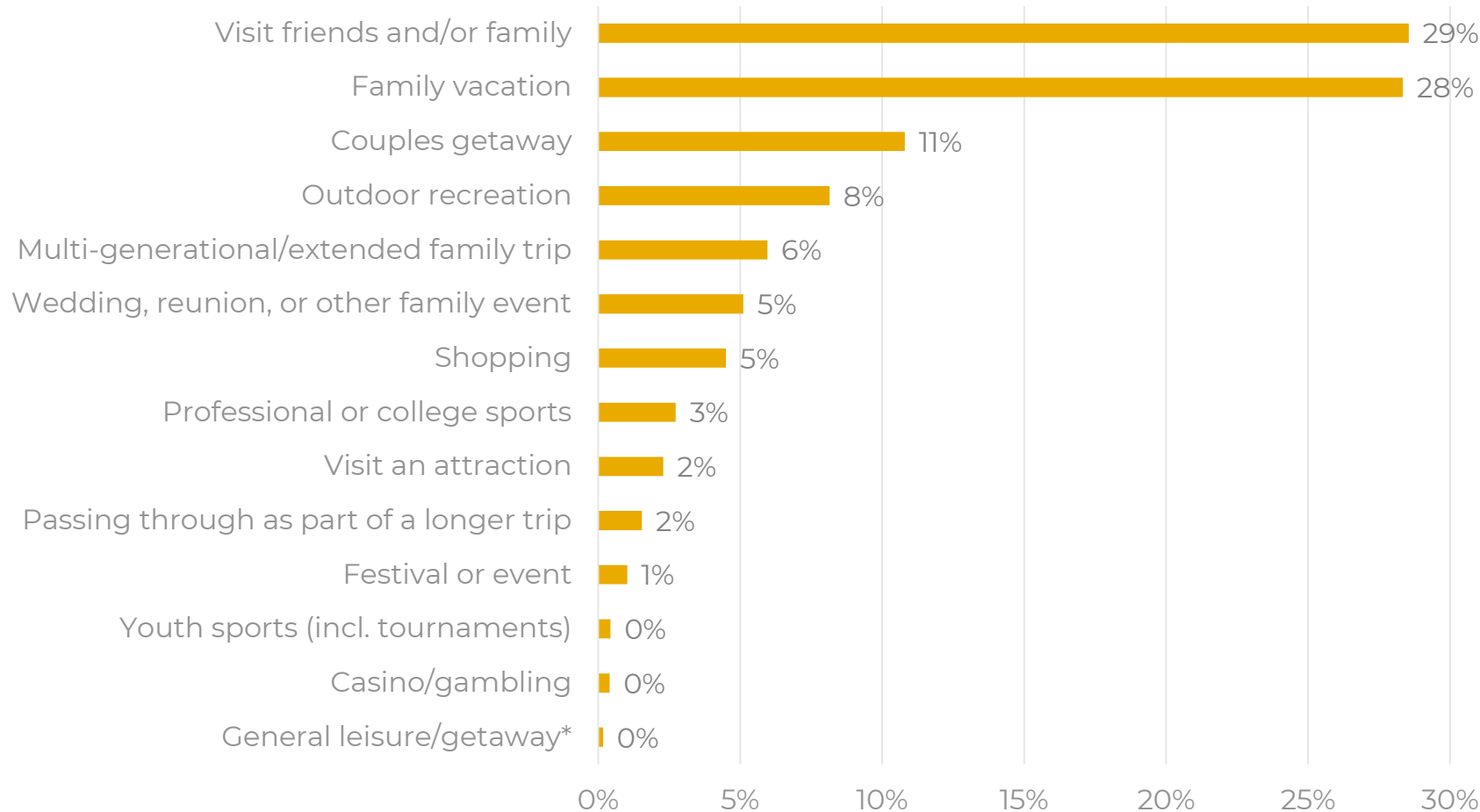| Purpose	Percentage
Visit friends and/or family	29%
Family vacation	28%
Couples getaway	11%
Outdoor recreation	8%
Multi-generational/extended family trip	6%
Wedding, reunion, or other family event	5%
Shopping	5%
Professional or college sports	3%
Visit an attraction	2%
Passing through as part of a longer trip	2%
Festival or event	1%
Youth sports (incl. tournaments)	0%
Casino/gambling	0%
General leisure/getaway*	0%

- Visiting friends/family (29%) and family vacations (28%) were the 2 most common reasons to visit.

- Women and Black Hispanics were even more likely to have visited friends and family in MD.

- While the percentages vary, the top four primary purposes for Hispanic travelers aligned to the top four from the 2021 Predictive Analytics study.

- *What was the primary reason for your [MONTH] [YEAR] trip?*
- *Note: An * indicates a category that was added as a result of back-coding.*

Background & Methods ▸ Trip Planning Behavior ▸ Perceptions ▸ **Past Visitation to Maryland** ▸ Insights & Implications

Trip Activities (Recent Visitors)

Bar chart — "Which of the following did you or a member of your travel party do during your [MONTH] [YEAR] trip?":

Activity	Percent
Shopping	41%
Beach	40%
Local seafood	37%
Experienced local culture	27%
Sightseeing	26%
Museum	22%
Scenic drive	20%
Historic site	18%
Swimming	17%
National or state park	17%
Local culinary scene	16%
Visited a Main St or downtown	15%
Had a picnic	13%
Fishing or hunting	13%
Visited friends and/or family	13%
Personal celebration	13%
Casino/Gambling	13%
Watersports/water activities	12%
Biking	12%
Live music	10%
Hiking	10%
Brewery/winery/distillery	9%
Guided tour	8%
Local festival	7%
Horseback riding and/or horse-centric activities	2%
None of these	1%
Other	1%

- Top visitor activities included:
  - Shopping (41%)
  - Beach (40%)
  - Local seafood (37%)

- Millennials were more likely to go biking, visit a museum and take a guided tour.

- Men were more likely to go biking and visit a brewery, while women were more likely to go shopping and sightseeing.

- Visitors from NY were more likely to have experienced local culture and the local culinary scene.

- Activities included in the "Other" responses include the Baltimore Aquarium, the Zoo and the Inner Harbor.

- *Which of the following did you or a member of your travel party do during your [MONTH] [YEAR] trip? Please select all that apply.*

Background & Methods | Trip Planning Behavior | Perceptions | Past Visitation to Maryland | Insights & Implications | 47

Recent Visitor Activities by Primary Purpose

Column %	Family vacation (incl multigen) n = 313	Visit friends and/or family n = 260	Couples getaway n = 98	Outdoor recreation n = 75	General leisure (incl shopping & attractions) n = 64
Beach	51% ↑	33%	43%	50%	34%
Local seafood	38%	39%	36%	29%	35%
Shopping	37%	51% ↑	55%	35%	38%
Sightseeing	33% ↑	19% ↓	30%	37%	21%
Experienced local culture	33% ↑	17% ↓	46% ↑	30%	27%
National or state park	24% ↑	12% ↓	16%	14%	23%
Scenic drive	23%	19%	25%	24%	10% ↓
Museum	22%	21%	24%	20%	36% ↑
Swimming	21%	16%	22%	15%	8% ↓
Historic site	19%	14%	27%	13%	18%
Fishing or hunting	17%	11%	7% ↓	24%	12%
Had a picnic	17%	10%	14%	22%	7% ↓
Local culinary scene	16%	18%	30% ↑	10%	6% ↓
Biking	14%	11%	12%	8%	12%
Visited a Main St or downtown	14%	16%	13%	15%	12%

RV activities by Primary purpose (Coded, S)
Weighted by: Generations, gender, HHI (W); N = 928; N = 1753; some empty rows or columns have been removed

- Family vacationers did more activities overall, especially the beach, sightseeing, experiencing local culture, and visiting a national or state park.

- Those visiting friends and relatives likely went shopping.

- Couples experienced local culture and the local culinary scene.

- General leisure travelers were the most likely to visit museums.

- *Which of the following did you or a member of your travel party do during your [MONTH] [YEAR] trip? Please select all that apply.*
- *Note: Top 15 rows (sorted by largest column) are shown here.*

Travel Parties (Recent Visitors)

Bar chart:

- Partner/spouse: 66%
- Your children/grandchildren under 18: 31%
- Friend(s): 22%
- Parent(s)/In-law(s): 12%
- Your adult children/grandchildren: 12%
- Sibling(s): 8%
- Cousin(s): 8%
- Solo/alone: 6%
- Niece(s)/Nephew(s): 3%
- Work buddy/buddies/colleague(s): 2%
- Aunt(s)/uncle(s): 2%
- Your godchildren: 1%
- Other family member(s): 5%
- Other: 0%

- 2 in 3 visitors traveled with their partner/spouse (66%).

- Just under half traveled with children in their travel party (47%).

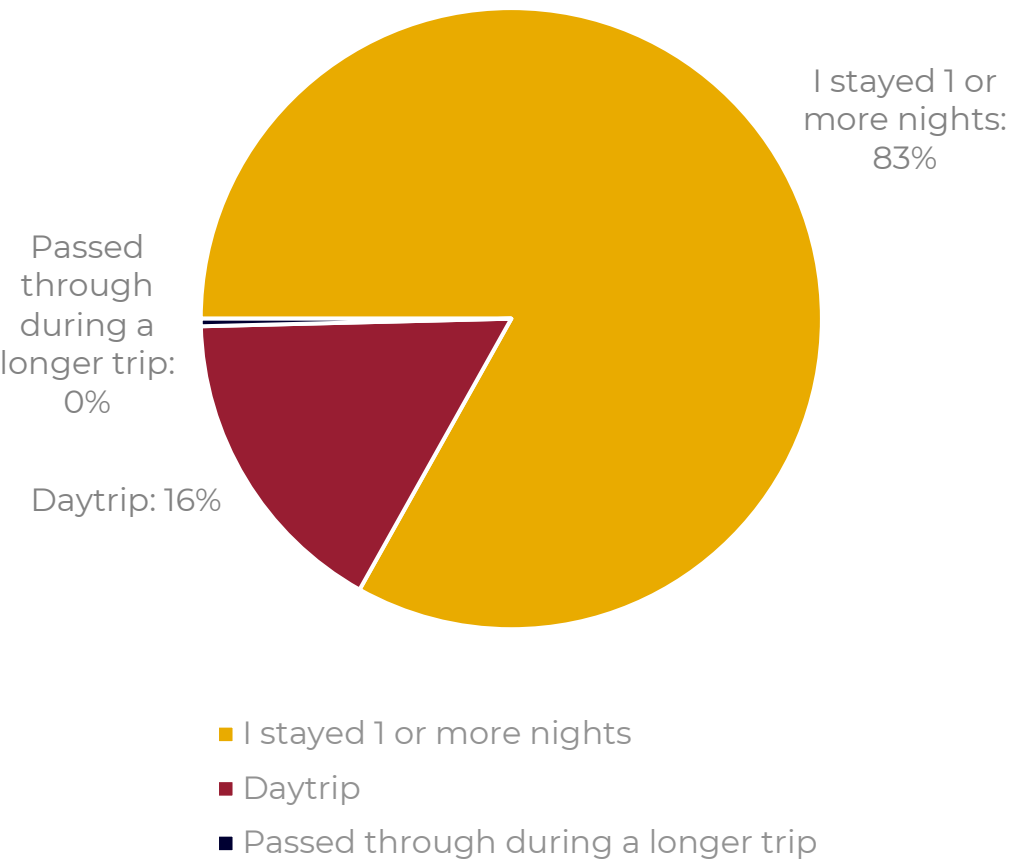- Those without children were significantly more likely to travel with friends.

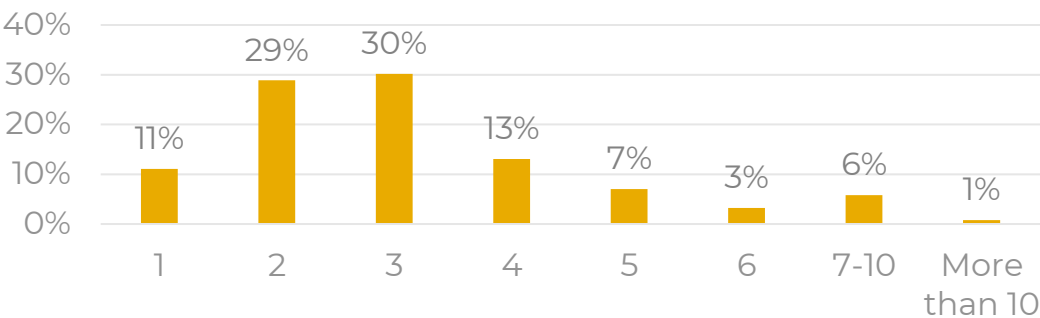|	With children	Without children
%	47%	53%
# of adults	3.3	2.8
# of children	1.9	--
Total travel party	5.3	2.8
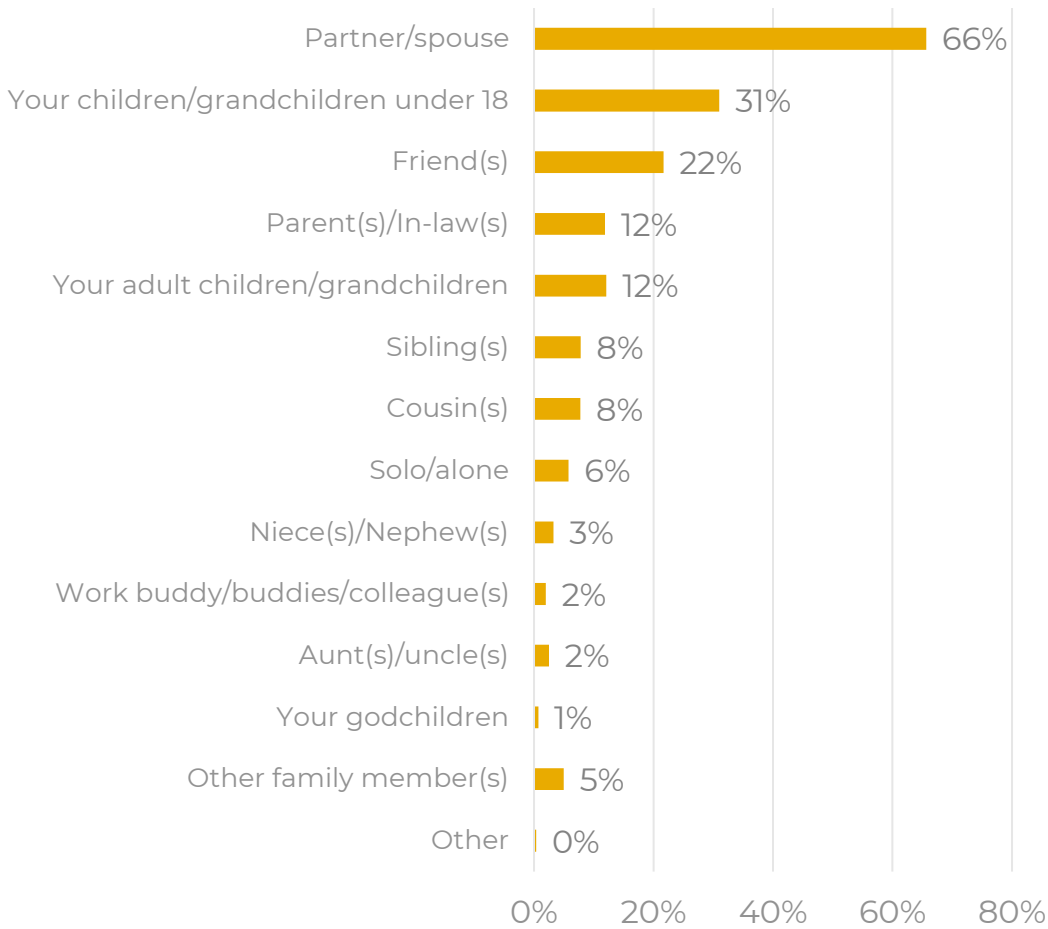
- *Who did you travel with on your [MONTH] [YEAR] trip? Please select all that apply.*
- *Including yourself, how many people were in your travel party?*

Overnight Stays (Recent Visitors)

Overnight Visitors

I stayed 1 or more nights: 83%

Passed through during a longer trip: 0%

Daytrip: 16%

- I stayed 1 or more nights
- Daytrip
- Passed through during a longer trip

Nights Stayed

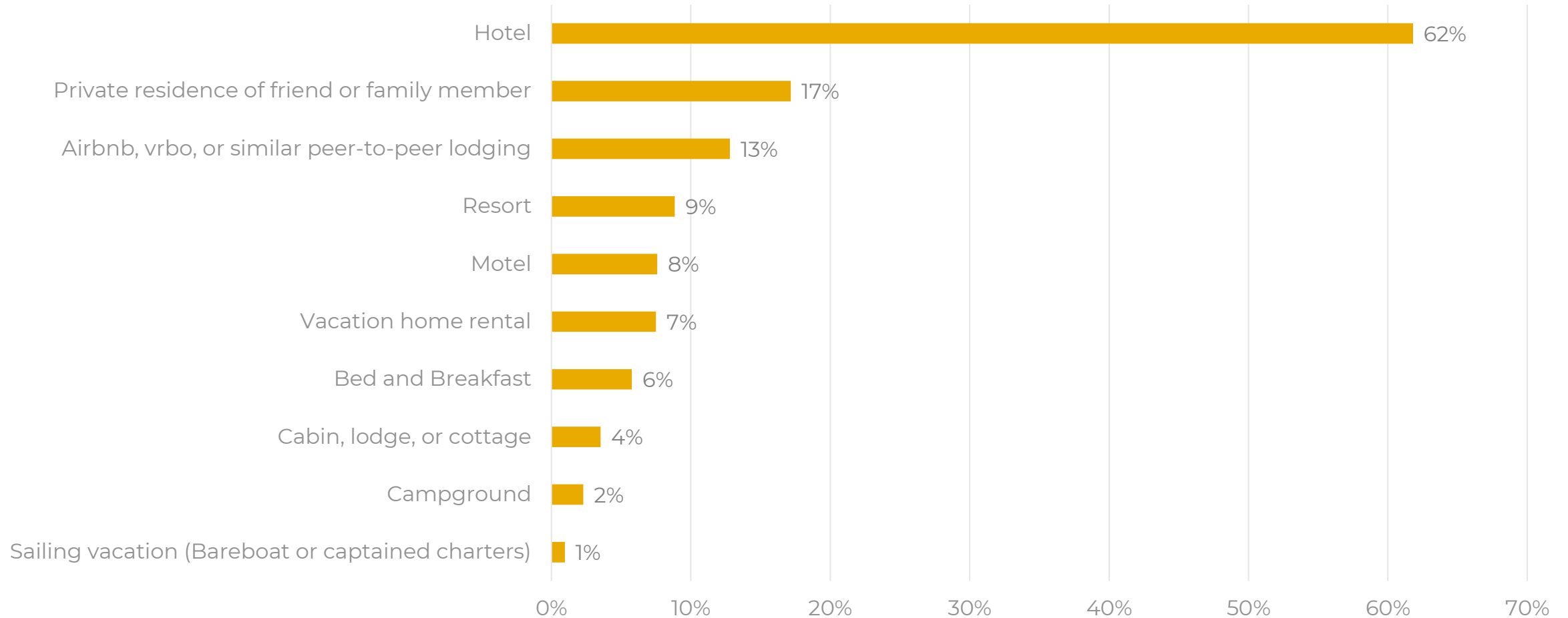| 1	2	3	4	5	6	7-10	More than 10
11%	29%	30%	13%	7%	3%	6%	1%

- 83% of recent visitors stayed at least one night.
  - o Overnight visitors stayed an average of 3.2 nights.
- This aligns with the 2021 Predictive Analytics study, where 86% of visitors stayed 2.9 nights.

Did you stay overnight on your most recent trip?
How many nights did you stay?

Lodging (Recent Visitors)

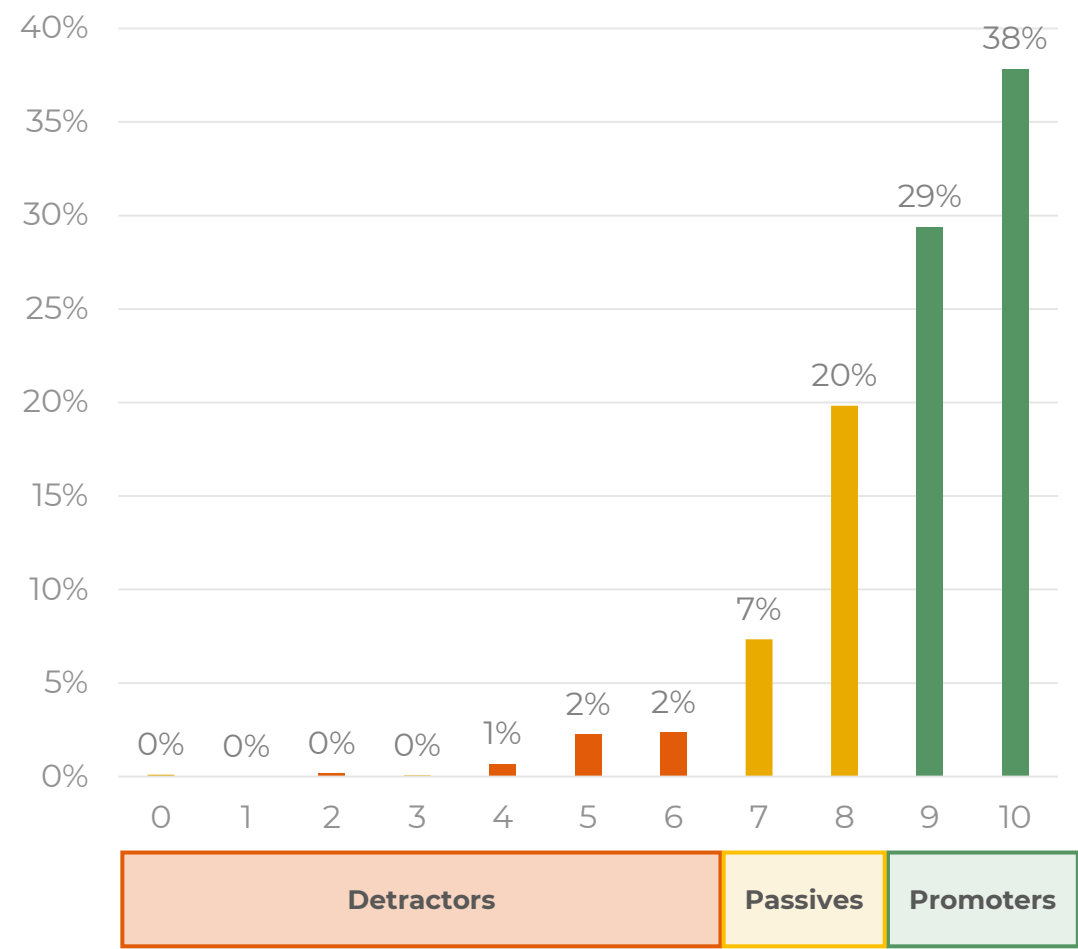| Lodging Type	Percentage
Hotel	62%
Private residence of friend or family member	17%
Airbnb, vrbo, or similar peer-to-peer lodging	13%
Resort	9%
Motel	8%
Vacation home rental	7%
Bed and Breakfast	6%
Cabin, lodge, or cottage	4%
Campground	2%
Sailing vacation (Bareboat or captained charters)	1%

• *Where did you stay?*

Net Promoter Score (All Visitors)

- The Net Promoter Score system measures the strength of word-of-mouth recommendation.
  - % promoters (9,10) – % detractors (0-6) = Net Promoter Score (NPS).

- The overall NPS for Maryland was **61.6**.
  - It was higher for NY, VA and Recent visitors.
  - It was lower for PA and Lapsed visitors.

- This is significantly higher than the 23.8 NPS measured in the 2021 Predictive Analytics study.

	New York	Philadel-phia	DC/NoVA	Combined PA	Combined VA	Recent	Lapsed
Detractors	5%	10%	8%	3%	8%	8%	5%
Neutrals	28%	31%	29%	23%	29%	30%	25%
Promoters	67%	59%	63%	74%	63%	62%	70%
NPS	62.6	49.1	55.3	71.5	55.3	54.5	65.6

How likely is it that you would recommend visiting Maryland to a friend, relative or colleague?

NPS By Generations, Gender & Race

Average		NPS
Generations	Gen Z	48.9 ↓
	Millennial	68.2 ↑
	Gen X	58.7
	Boomer	60.7
Gender (S)	Man	65.7
	Woman	57.1
Race/Ethnicity (S)	White	61.7
	Black/African-American	61.9
	Only [Identity Term]	60.5

Generations, gender, race/ethnicity by NPS (avg)
Weighted by: Generations, gender, HHI (W); n = 1429; N = 1753

- Overall, Millennials gave a higher NPS to Maryland than other generations, while Gen Z gave a lower score.
  - Focus group findings hinted that Gen Z rates MD lower because it's not seen as an exciting, urban adventure-filled destination which is what they seek as singles traveling with friends.
  - It will be important to communicate with Gen Z to set them up for their next life stage, when they are looking for a more family friendly destination.
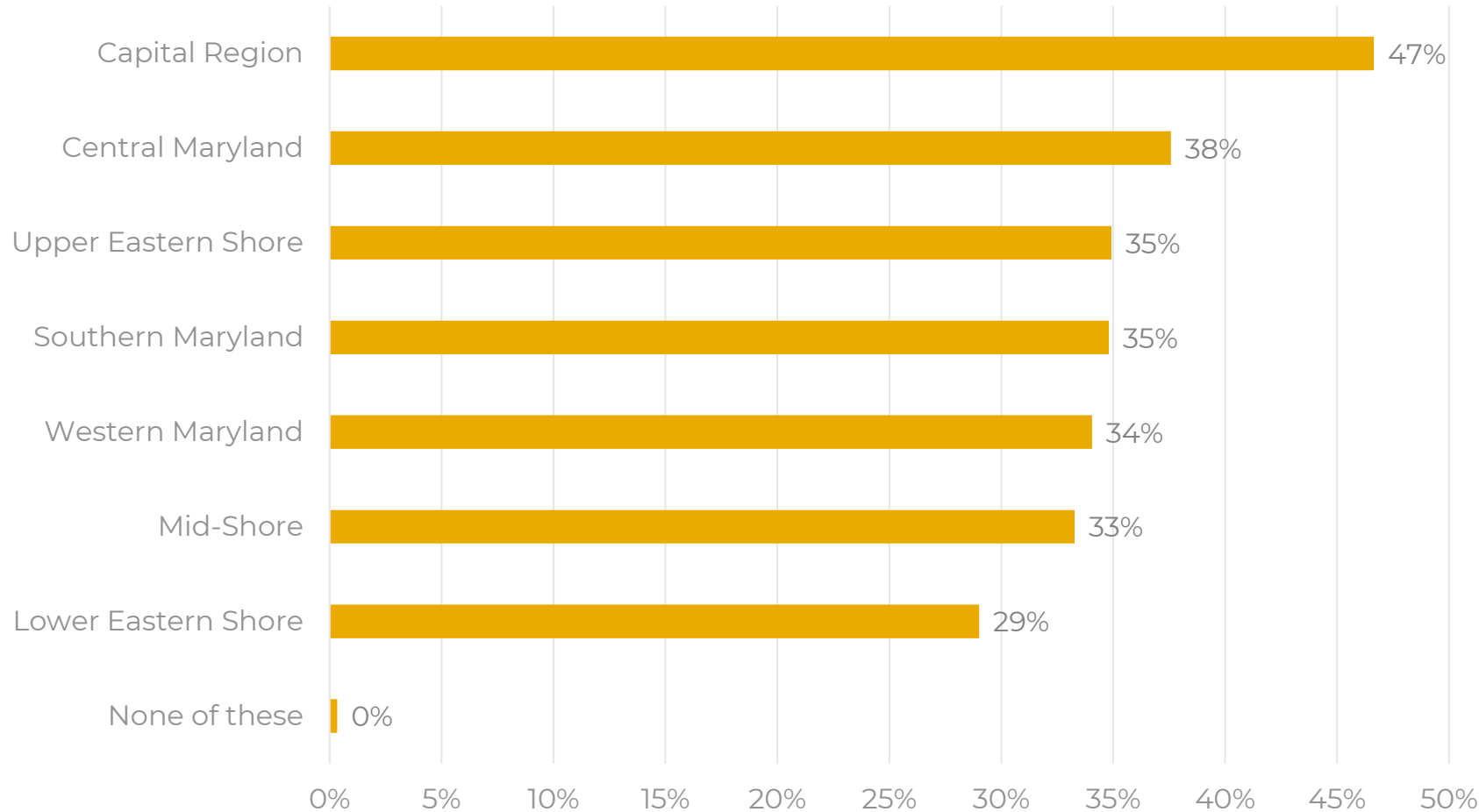- No significant differences were found among genders or races.

Summary of Lapsed & Non-Visitors to Maryland

- 85% of Hispanic leisure travelers would consider MD for a future leisure trip.

- Those who have not yet visited, or haven't visited in several years, would most likely be interested in visiting the Capital Region (47%).
  - 42% of Millennials would likely be interested in visiting Western MD.

- Lapsed visitors (who last visited MD more than 4 years ago) skew older (37.8 years old) while Non-visitors skew younger (36.6 years old).

- They would be most likely to visit for a family vacation (28%) or to visit friends or family (25%). 14% might come for a couples getaway.

- They would be interested in the beach, sightseeing or shopping.

- They would be likely to stay in a hotel (71%), and visit in the spring (58%) or summer (55%).

Regions of Interest (Lapsed & Non-Visitors)

Capital Region — 47%
Central Maryland — 38%
Upper Eastern Shore — 35%
Southern Maryland — 35%
Western Maryland — 34%
Mid-Shore — 33%
Lower Eastern Shore — 29%
None of these — 0%

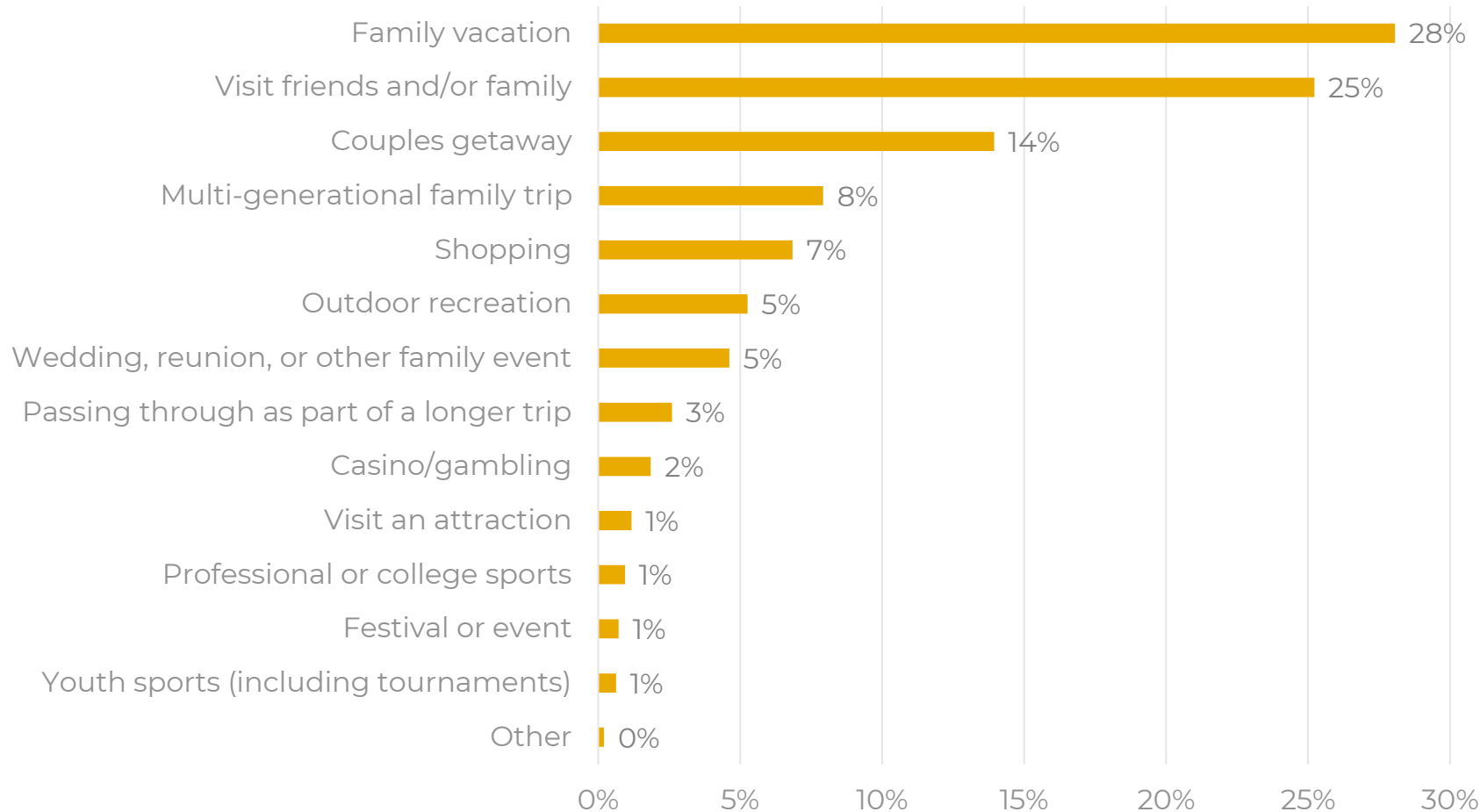(X-axis: 0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%)

- Lapsed and Non-visitors might be interested in visiting the Capital Region, followed by Central Maryland.

- They had the least interest in visiting the Lower Eastern Shore.

- 42% of Millennials are interested in visiting Western MD.

If you had the opportunity to travel to Maryland in the near future for an overnight leisure trip, where would you be most interested in visiting? Choose up to 5 regions.

Background & Methods | Trip Planning Behavior | Perceptions | Past Visitation to Maryland | Insights & Implications

55

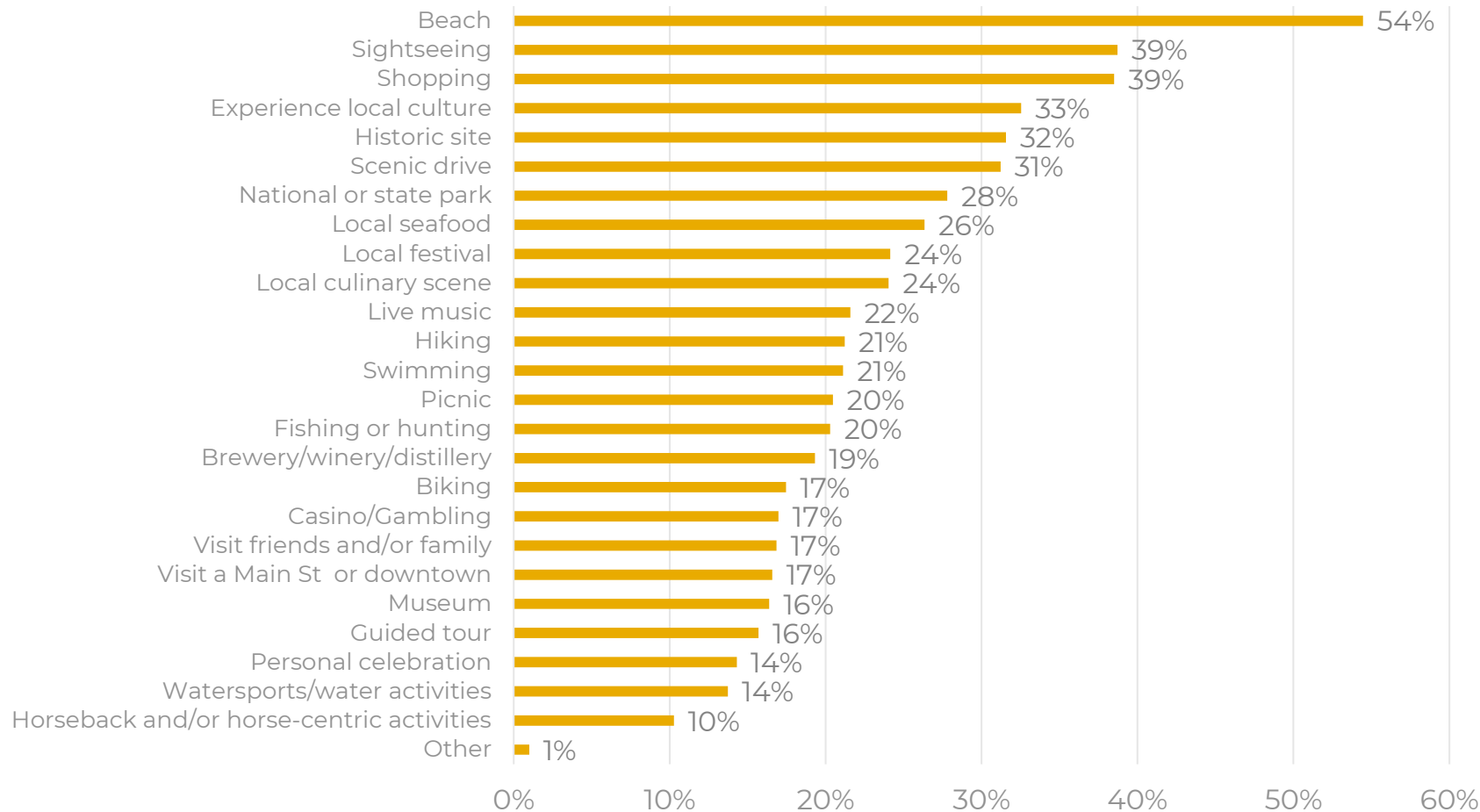# Likely Primary Purpose (Lapsed & Non-Visitors)

- The top potential primary purposes for visiting Maryland in the future centered around family – vacations, visiting MD family/friends, couples getaways and multi-generational family trips.

Family vacation — 28%
Visit friends and/or family — 25%
Couples getaway — 14%
Multi-generational family trip — 8%
Shopping — 7%
Outdoor recreation — 5%
Wedding, reunion, or other family event — 5%
Passing through as part of a longer trip — 3%
Casino/gambling — 2%
Visit an attraction — 1%
Professional or college sports — 1%
Festival or event — 1%
Youth sports (including tournaments) — 1%
Other — 0%

What would be the one most likely primary reason for your visit to Maryland for an overnight leisure trip?

Trip Activities (Lapsed & Non-Visitors)

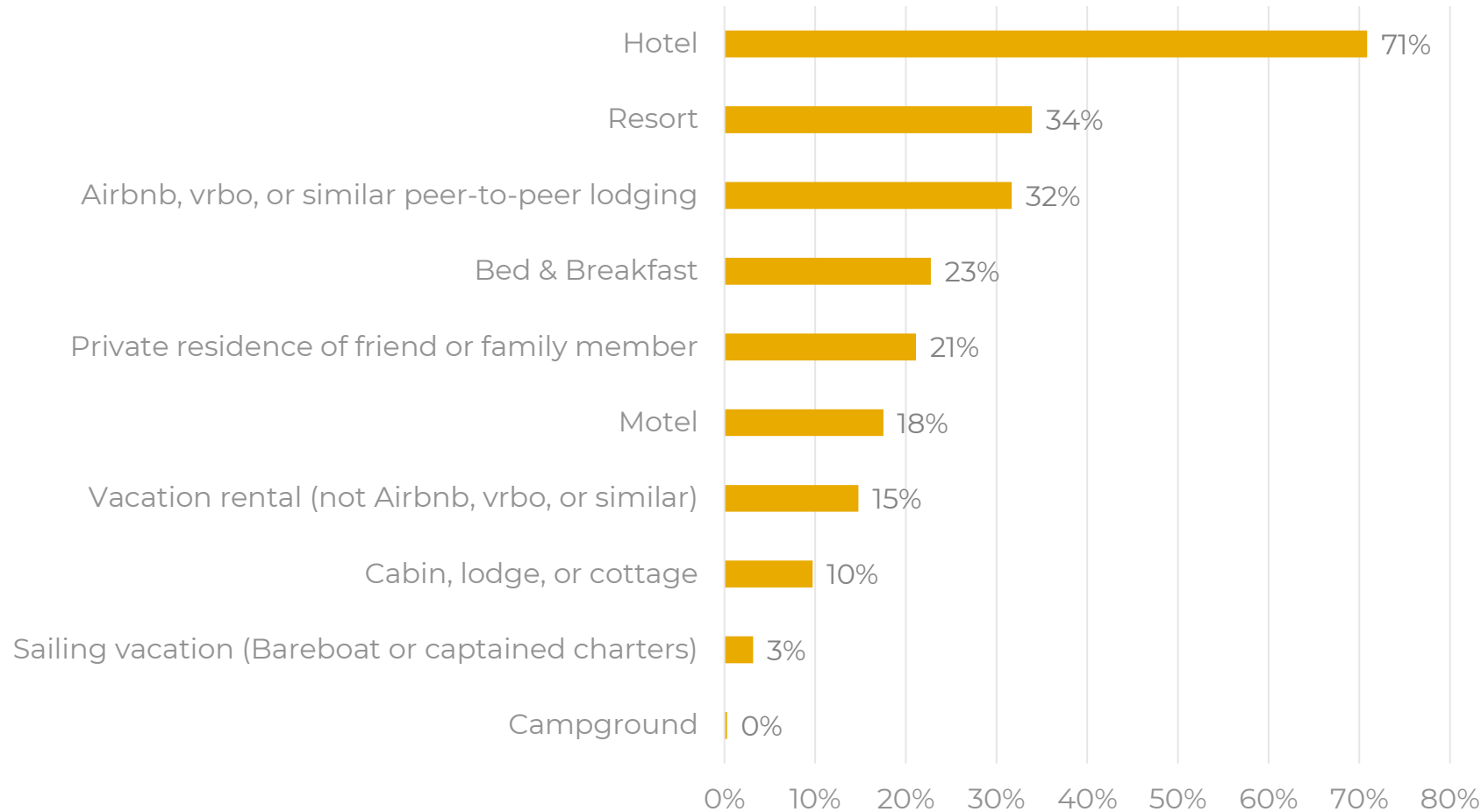| Activity	Percentage
Beach	54%
Sightseeing	39%
Shopping	39%
Experience local culture	33%
Historic site	32%
Scenic drive	31%
National or state park	28%
Local seafood	26%
Local festival	24%
Local culinary scene	24%
Live music	22%
Hiking	21%
Swimming	21%
Picnic	20%
Fishing or hunting	20%
Brewery/winery/distillery	19%
Biking	17%
Casino/Gambling	17%
Visit friends and/or family	17%
Visit a Main St or downtown	17%
Museum	16%
Guided tour	16%
Personal celebration	14%
Watersports/water activities	14%
Horseback and/or horse-centric activities	10%
Other	1%

- Lapsed and Non-visitors might be interested visiting a beach, sightseeing and shopping.
  - Top interests largely mimic to those identified in the 2021 Predictive Analytics study – local seafood, beach, shopping and sightseeing.

- They are less likely to be interested in horseback riding, water activities, guided tours or museums.

If you were to plan an overnight Maryland trip in the future, what would you potentially like to do? Please select up to 10 activities.

Likely Lodging (Lapsed & Non-Visitors)

- Lapsed and Non-visitors would likely stay in hotels (71%).

Lodging Type	Percentage
Hotel	71%
Resort	34%
Airbnb, vrbo, or similar peer-to-peer lodging	32%
Bed & Breakfast	23%
Private residence of friend or family member	21%
Motel	18%
Vacation rental (not Airbnb, vrbo, or similar)	15%
Cabin, lodge, or cottage	10%
Sailing vacation (Bareboat or captained charters)	3%
Campground	0%

Where would you be most likely to stay? Please select up to 3 lodging types you would be likely to choose?

Likely Trip Timing (Lapsed & Non-Visitors)
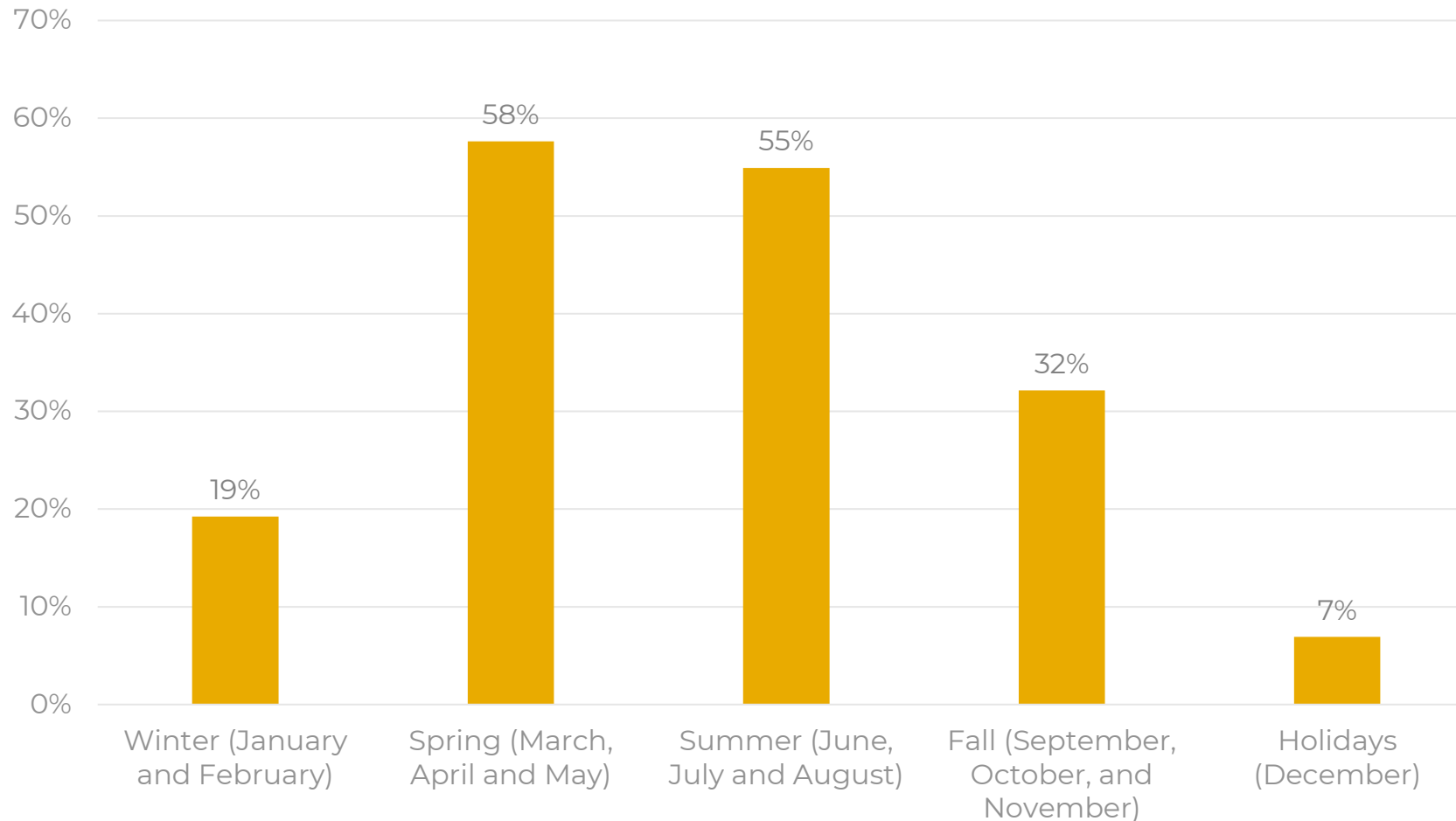
- Lapsed and Non-visitors would be most likely to visit in the spring (58%) or summer (55%).

- Millennials would be more likely to visit in the winter (27%).

With Millennials more interested in traveling to Western Maryland and during the winter months, they are a good target for winter activities.

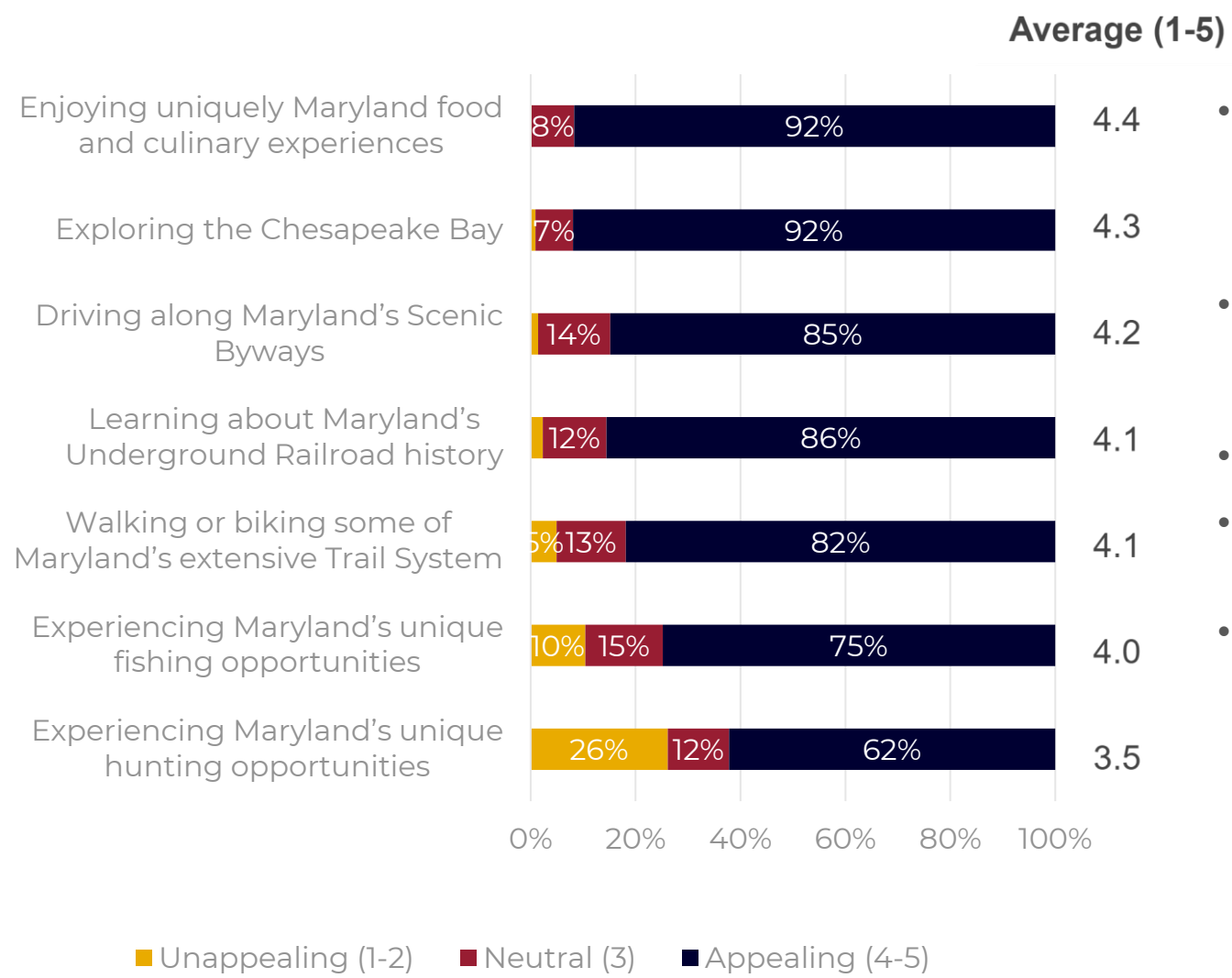*During which season(s) would you be most likely to visit Maryland? Select all that apply*

Lure Testing (All Respondents)

Aspect	Percentage
Abundant coastline and beaches	43%
A diverse culinary scene	37%
Unique cultural history and heritage	33%
Museums and historic sites	33%
A variety of outdoor activities	32%
Walkable waterfront towns	31%
Unique scenic drives	30%
Music festivals	27%
One-of-a-kind shopping experiences	26%
Fun theme parks and family-friendly…	24%
Agritourism activities	23%
Local seafood	20%
Fishing and/or hunting opportunities	20%
Access to professional sports	18%
Wide range of freshwater and saltwater…	18%
Local breweries, distilleries, and/or…	14%
Other	1%

- All respondents would be motivated by hearing about MD's abundant coastline and beaches (43%).
  - Boomers (52%), Gen X (47%) are especially interested

- Generational differences in interest:
  - Boomers: cultural history & heritage (46%), walkable waterfront downtowns (43%), local seafood (39%)
  - Gen X: Diverse culinary scene (41%), museums/historic sites (38%)
  - Millennial: Access to professional sports (25%)
  - Gen Z: Theme parks and family-friendly activities

- DMA differences in interest:
  - NY: More interest overall, especially culinary, history/heritage and museums/historic sites
  - Philadelphia: Local seafood
  - PA: Museums and music festivals
  - DC: Access to professional sports
  - VA: Fishing/hunting

- *Which of the following aspects of Maryland, if you knew more about it, might motivate you to consider Maryland for a future multi-day overnight leisure trip? Please select all that apply.*

Tourism Asset Appeal (All Respondents)

Average (1-5)

Asset	Chart	Average
Enjoying uniquely Maryland food and culinary experiences	8% / 92%	4.4
Exploring the Chesapeake Bay	7% / 92%	4.3
Driving along Maryland's Scenic Byways	14% / 85%	4.2
Learning about Maryland's Underground Railroad history	12% / 86%	4.1
Walking or biking some of Maryland's extensive Trail System	5% 13% / 82%	4.1
Experiencing Maryland's unique fishing opportunities	10% 15% / 75%	4.0
Experiencing Maryland's unique hunting opportunities	26% 12% / 62%	3.5

0% 20% 40% 60% 80% 100%

■ Unappealing (1-2)   ■ Neutral (3)   ■ Appealing (4-5)

- Overall, respondents found Maryland's food and culinary experiences to be most appealing, followed by exploring the Chesapeake Bay.

- More than 8 in 10 also found MD's Scenic Byways and Underground Railroad history to be appealing.

- Millennials are more interested in all assets.

- VA travelers are more interested in the Underground Railroad and Scenic Byways.

- PA travelers are more interested in exploring the Chesapeake Bay and hunting opportunities.

- *On a scale of 1-5, how appealing do you find each of the following uniquely Maryland experiences?*

Overall Insights & Implications

How Maryland's Likely Hispanic Traveler Differs from the US Hispanic Leisure Traveler

Demographics

Compared to the general US Hispanic leisure traveler, those likely to visit Maryland are:

- Slightly younger (average age 37 vs. 41 nationally)
- More likely to identify with their Hispanic identity alone (no separate racial/ethnic label)
- More likely to be born in the US (87%)
- Strongly bilingual – often speak English and Spanish equally at home

Travel Behavior & Trip Type

- Most common trip purposes: family vacation (28%) and visiting friends or family (29%)
- Travel parties often include spouses (66%) and children (47%)
- Overnight visitors stay an average of 3.2 nights
- More likely to drive than fly, especially for family groups
- Motivated by spending quality time with family, affordability and stress relief

- *US Hispanic Leisure Traveler represented by MMGY Vistas Latinas Report, 2021*

How Maryland's Likely Hispanic Traveler Differs from the US Hispanic Leisure Traveler

Trip Planning & Priorities

- Prioritize destinations that feel welcoming to Hispanic travelers

- Highly value safety, especially among women and LGBTQ+ respondents

- Desire cultural visibility – want to see other Hispanics and cultural celebrations

- Most important planning factors: family connection, affordability and cultural fit

- Preference for places that offer Spanish-speaking staff for older relatives, even if the main traveler is fluent in English

Media Habits & Inspiration

- Heavy users of TripAadvisor (59%), social media (44%) and word of mouth (45%)

- Instagram (71%), Facebook (62%) and YouTube (60%) are top platforms

- Prefer English-language content for planning but value high-quality Spanish materials for others in their group

- Respond strongly to video-based inspiration and visual storytelling

- Younger travelers often serve as the travel planners for the group, especially in bilingual households

Recent Visitor Segments

Family Vacationers

61%

NPS = 80.3

These visitors come often, stay long, have family fun and rave about their trips. They could be motivated to return for music festivals and agritourism.

- 53% Millennial; 25% Gen X
- Relatively higher income (23% $150K+)
- Born in US (91%)
- 3.2 past MD visits
- Most likely to visit for family vacations (30%) in Western MD (31%), Southern MD (27%) and Upper Eastern Shore (19%)
- Most likely to stay at a hotel (70%) or resort (14%)
- Stay 3.5 nights
- Likely to do more activities (4.7) including museums, biking, hiking, live music
- Overall more positive MD sentiment

Visiting Friends & Relatives

28%

NPS = 56.6

These visitors come to MD because their friends and family are here. They might be motivated by food experiences, scenic byways, and exploring the Bay.

- 36% Millennial; 22% Gen Z
- Relatively lower income (58% $50-$100K)
- Born in US (87%)
- 3.1 past MD visits
- Most likely to visit friends or family (34%) in the Capital Region (34%) or Central MD (32%)
- Most likely to stay with friends/family (26%)
- Stay 2.7 nights
- Likely to do 4.1 activities, including enjoy seafood/ culinary scene, scenic drives
- Overall more neutral MD sentiment

Family Event Participants

11%

NPS = 34.2

Split between Boomers and Gen Z, these visitors come for family events where they didn't necessarily choose MD. They might be motivated to learn about outdoor activities and MD's waterfront/coastline.

- 34% Boomer; 25% Gen Z
- Relatively lower income (62% $50-$100K)
- 24% not born in US
- 2.6 past MD visits
- Most likely to visit for weddings/reunions (8%), multigen family trip (8%)
- Most likely to be on daytrip (27%)
- Stay 2.9 nights
- Likely to do fewer activities (3.7), including experiencing local culture and sightseeing
- Overall more negative MD sentiment

Highest Overall Value ← → Lowest Overall Value

Summary of Insights

- Overall, Hispanic leisure travelers are a strong target group for Maryland.
  - 85% would consider Maryland for a leisure trip, and 55% have visited recently.
  - Recent visitors are highly likely to recommend visiting MD to others, with a 61.6 Net Promoter Score (vs. 23.8 measured among general travelers in a 2021 study).
  - For those who have not visited, lack of awareness and competition with more renowned destinations were cited as reasons.

- Maryland is best known for crabs/seafood, "the beach", Baltimore and being near DC.
  - Those from busy urban areas consider it slow, peaceful and safe – the perfect destination for families.
  - Even though they associate MD with the beach, they are generally less likely to visit Ocean City/Lower Eastern Shore, and more likely to visit Central, Capital, and Western Maryland.

- By far, Hispanic leisure past visitors to MD have come for a family vacation or to visit friends and relatives.
  - Spending quality time with family and affordability are their most important travel factors.
  - Because MD is seen as a family destination, it is less appealing to Gen Z and Boomers, and more appealing to Millennials and Gen X. In other words, life stage has an impact on destination appeal.

- This highly acculturated audience is likely to be wooed by video on Instagram, Facebook, or YouTube.
  - They also make strong use of trip review sites to plan their travel.
  - For multigenerational, diverse group of travelers, the planning/research fell on the individual with most language fluency, traditionally the older adult child.
  - When in market with older relatives, they appreciate having Spanish speakers around to converse with.

- They would most likely be motivated by learning more about MD's coastline and beaches, culinary scene, and cultural history and heritage.

Implications for Attracting This Audience

- Educate on coastline and beaches in other areas of Maryland besides Ocean City/Lower Eastern Shore.

- Target Millennials especially for winter travel and the Western region.

- Prime Gen Z for visiting once they enter the family life stage; right now they are visiting more renowned and "exciting" destinations.
  - Gen Z is especially interested in experiencing Hispanic culture and exploring their culture/roots (Vistas Latinas).

- Highlight cultural festivals and events that celebrate Latino heritage.

- Market Maryland's local food (seafood, crabs, crabcakes), but also point to the authentic and fusion Hispanic cuisine available.

- Consider involvement with Spanish-speaking influencers or vloggers, such as Alan por el mundo, Oscar Alejandro and Luisito Comunica.

- Consider incorporating Spanish into marketing and advertising, but only if done well by a native speaker. This could reduce the burden of planning and translating by younger generations.

Hispanic Millennial Travelers

A Spotlight

Hispanic Millennial Traveler (Age 29 – 44)

- Hispanic identity is strong within this group: 76% identify as Hispanic and 24% identify as Only [Identity Term] – not a separate race or ethnicity, which is higher than other generational cohorts.

- This group tends to travel with a spouse/partner (71%) or friends (28%) – the latter being higher than all other generations.

- Travel Motivations & Priorities
  - Less likely to travel for relaxation (33%) – suggesting they prefer engaging, active, and purpose-driven trips.
  - Less influenced by word-of-mouth recommendations (34%) or prior knowledge (22%) – while digital discovery plays a stronger role.
  - More likely than other generations to prioritize:
    - Safety for Hispanic/Latino travelers (4.2)
    - Engaging with Hispanic culture (food, celebrations, art) (4.1)
    - Interacting with people from their own cultural background (4.1)
    - Spanish-language resources & accessibility (4.0)
    - Supporting Latin-owned businesses (4.0)

- Where They Get Travel Inspiration
  - Trip review sites are their #1 resource for planning (53%), though they under-index here against other generations.
  - Social media and cable and streaming platforms play a significant role:
    - 81% use Instagram (highest among all generations)
    - Over-index on use of WhatsApp (28%) and Snapchat (31%)
    - More influenced by social media ads (36%) and cable and streaming TV (19%) than other groups

Hispanic Millennial Traveler (Age 29 – 44)

- Destinations & Activities in Maryland
  - 88% have visited Maryland before
  - They over-index on positive sentiment toward Maryland:
    - Welcoming to Hispanics (4.3/5)
    - Safe to visit (4.3/5)
    - Appealing (4.3/5)
  - On a prior visit, more likely than other generations to have:
    - Visited a museum (27%)
    - Gone biking (15%)
    - Taken guided tours (11%)
  - Strong interest in visiting Western Maryland (42%) in the future, with increased winter visitation intent (27%), suggesting skiing and winter sports could be strong motivators

- Top-Ranked Maryland-Specific Experiences:
  - Uniquely Maryland food and culinary experiences (4.5/5)
  - Exploring the Chesapeake Bay (4.4/5)
  - Driving along Maryland's Scenic Byways (4.4/5)

Hispanic Millennial Traveler Considerations

- **Lead with Cultural and Culinary Experiences**
  - o Hispanic Millennials over-index on appreciating Maryland's culinary tourism and value engaging with Hispanic culture when traveling.
  - o Position Maryland's food scene as an essential part of the experience, particularly showcasing diverse, Latin-friendly offerings beyond just seafood.
  - o Example Tactics:
    - ▪ Feature Latino food tours or chef-driven culinary stories on social media.
    - ▪ Highlight restaurants that embrace Latin flavors or Latin-owned establishments in Maryland.

- **Spotlight Western Maryland's Adventure Offerings**
  - o Millennials have higher past and future intent to visit Western Maryland and are open to winter travel, suggesting skiing and cold-weather sports could be a draw.
  - o Promote Maryland's outdoor recreation in all seasons, emphasizing hiking, biking and winter sports in particular.
  - o Example Tactics:
    - ▪ Instagram reels or stories showcasing skiing, hiking and biking trips in Western MD.
    - ▪ Partner with travel YouTubers to create vlogs about winter weekend getaways in Maryland.
    - ▪ Target Hispanic Millennials with programmatic digital ads featuring Western MD as an unexpected adventure destination.

Hispanic Millennial Traveler Considerations

- **Spanish Resources and Latin-Owned Businesses**
  - This audience values destinations that provide Spanish-language services, materials and accessibility for all travelers.
  - They also prefer to support Latin-owned hotels, resorts and businesses that give back to Hispanic communities.
  - Example Tactics:
    - Ensure Maryland's tourism website, visitor guides and ads have Spanish-language versions.
    - Curate a list of Latin-owned Maryland businesses to include in destination marketing efforts.
    - Run Spanish-language digital campaigns featuring Hispanic influencers sharing real travel experiences.

- **Lean Into Social and Digital Media – Especially Instagram & WhatsApp**
  - Hispanic Millennials look to social media ads more than older generations and are highly engaged on Instagram (81%), WhatsApp (28%), and Snapchat (31%).
  - Unlike older groups, they are less influenced by recommendations from family/friends, making digital storytelling critical.
  - Example Tactics:
    - Leverage Instagram stories and reels to create snackable, visually compelling Maryland travel moments.
    - Use WhatsApp marketing for personalized travel promotions in Spanish.
    - Create targeted streaming video ads on Hulu, YouTube and Spanish-language networks featuring real stories from Hispanic travelers who love Maryland.

Thank you!

Maryland
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