Study Overview

ABOUT THE STUDY

Visit Annapolis & Anne Arundel County (VAAAC) contracted Rockport Analytics to conduct an independent research study based on primary data collection. The goal of this study was to assess the current visitor profile and sentiment.

Data from visitors were collected through an in-person intercept survey administered by VAAAC staff and volunteers from April 24, 2019 to October 31, 2019. Visitors were intercepted at the Annapolis Visitor Center, City Dock, and other parts of downtown Annapolis.

FOR THE ENTIRE 2020 VISITOR PROFILE REPORT, PLEASE VISIT

www.vaaac.org/reports
One of the key goals of the study was to obtain measures of visitors satisfaction, which required respondents that had been in Annapolis for at least 4 hours and reside outside of Anne Arundel County. A total of 1,595 individuals were invited to participate in the survey with 75% qualifying to participate.

**METHODOLOGY**

Results from this analysis are based on responses from **1,193 COMPLETED SURVEYS**

The total margin of error for the survey is +/- 2.5%.
Key Findings

The study identified a number of key findings including the highlights presented here. Please see the full report for complete findings.

<table>
<thead>
<tr>
<th>Visitor Profile</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PRIMARY REASON FOR VISITING</td>
<td>AVERAGE PARTY SIZE</td>
</tr>
<tr>
<td>LEISURE VISIT</td>
<td>3.18 PEOPLE</td>
</tr>
<tr>
<td>54%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AVERAGE LENGTH OF STAY</th>
<th>OVERNIGHT VISITORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.22 DAYS</td>
<td>69% SPENT THE NIGHT</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PRIMARY ACCOMMODATIONS</th>
<th>HOUSEHOLD INCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>STAYED IN A HOTEL</td>
<td>$95k AVERAGE INCOME</td>
</tr>
<tr>
<td>51%</td>
<td></td>
</tr>
</tbody>
</table>
Events Draw

48% of the respondents attended a major event during the study dates.

On average, event attendees stayed longer and spent more per trip than the average Annapolis visitor.
Visitor Profile

GENERATIONAL COHORTS

SHARE OF BY GENERATION

43% GEN X
19% BOOMERS
27% M U L E N N I A LS
10% GEN Z
1% SILENT GENERATION

SHARE OF BY OVERNIGHT SPENDING

$515 AVERAGE GEN Z
$596 AVERAGE GEN X
$606 AVERAGE BOOMERS
$654 AVERAGE MILLENNIAL
**MILLENNIALS**

were more likely to spend a larger proportion of their trip budgets on entertainment, recreation and shopping.

**GEN XERS**

had the longest average length of stay and the highest average party size among all generational cohorts.

**BABY BOOMER**

had the highest percentage of first time visitors.

**GEN Z**

were much more likely than other visitors to stay in a short-term vacation rental.
A total of 597 respondents (65% of completed surveys) participated in Arts & Culture activities, including galleries, concerts, theater, and dance during their stay in Annapolis. Arts and Culture visitors have significantly longer lengths of stay despite a lower proportion of in-state visitors.

**Average Spend per Overnight Visitor: $663**

- **6%** Transportation
- **23%** F&B
- **22%** Shopping
- **35%** Lodging
- **14%** Entertainment

**Arts & Culture Index Scores by Generational Cohort**

<table>
<thead>
<tr>
<th></th>
<th>61</th>
<th>109</th>
<th>111</th>
<th>100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boomers</td>
<td>100 average number of activity participants within cohort</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gen X</td>
<td></td>
<td>109</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Millennials</td>
<td></td>
<td>111</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gen Z</td>
<td></td>
<td></td>
<td>100</td>
<td></td>
</tr>
</tbody>
</table>
A total of 632 respondents (69% of completed surveys) participated in Culinary & Dining Experience activities, including visits or tours to wineries, distilleries, and breweries - during their stay in Annapolis. Culinary & Dining experience visitors are more likely to be traveling from out-of-state and have a longer average length of stay than other visitors.

**AVERAGE SPEND PER OVERNIGHT VISITOR: $668**

- **Lodging**: 39%
- **F&B**: 25%
- **Shopping**: 19%
- **Entertainment**: 12%
- **Transportation**: 5%

**CULINARY & DINING INDEX SCORES BY GENERATIONAL COHORT**

- **Boomers**: 100
- **Gen X**: 95
- **Millenials**: 111
- **Gen Z**: 90

100 average number of activity participants within cohort
A total of 281 respondents (31% of completed surveys) participated in Maritime activities, including boating, sailing, and water sports - during their stay in Annapolis. Maritime visitors are much more likely to be traveling from out-of-state and have a longer average length of state. Maritime visitors also had a significantly higher average household income.

**AVERAGE SPEND PER OVERNIGHT VISITOR: $701**

- **Lodging**: 35%
- **F&B**: 27%
- **Shopping**: 21%
- **Entertainment**: 13%
- **Transportation**: 4%

### Maritme Activity Index Scores by Generational Cohort

<table>
<thead>
<tr>
<th>Generation</th>
<th>Number of Activity Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boomers</td>
<td>111</td>
</tr>
<tr>
<td>Gen X</td>
<td>98</td>
</tr>
<tr>
<td>Millennials</td>
<td>107</td>
</tr>
<tr>
<td>Gen Z</td>
<td>70</td>
</tr>
</tbody>
</table>

100 average number of activity participants within cohort.
A total of 428 respondents (47% of completed surveys) participated in History activities, including historic sites, parks, and museums - during their stay in Annapolis. History visitors were more likely to have traveled to Annapolis from out of state and over one-third (36%) were first time visitors.

**AVERAGE SPEND PER OVERNIGHT VISITOR: $699**

**HISTORY ACTIVITY INDEX SCORES BY GENERATIONAL COHORT**

- **BOOMERS**: 150 (average number of activity participants within cohort)
- **GEN X**: 84
- **MILLENIALS**: 96
- **GEN Z**: 80

- 25% F&B
- 39% LODGING
- 13% ENTERTAINMENT
- 18% SHOPPING
- 5% TRANSPORTATION
A total of 123 respondents (13% of completed surveys) participated in General Business activities, including meeting, convention, and conference during their stay in Annapolis. Business travelers spent significantly more than leisure travelers- $895 per trip on average. Entertainment and shopping made up a significantly smaller proportion of their trip budget than that of leisure travelers.

**AVERAGE SPEND PER OVERNIGHT VISITOR: $895**

- 24% F&B
- 46% LODGING
- 13% SHOPPING
- 10% ENTERTAINMENT
- 7% TRANSPORTATION

**BUSINESS ACTIVITY INDEX SCORES BY GENERATIONAL COHORT**

<table>
<thead>
<tr>
<th>Generation</th>
<th>Number of Activity Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boomers</td>
<td>94</td>
</tr>
<tr>
<td>Gen X</td>
<td>109</td>
</tr>
<tr>
<td>Millennials</td>
<td>85</td>
</tr>
<tr>
<td>Gen Z</td>
<td>120</td>
</tr>
</tbody>
</table>
Annapolis visitors are highly satisfied with their visit. When asked about four key attributes and their feeling of importance to their visit compared to their satisfaction during the stay, **ANNAPOLIS RANKED EXTREMELY HIGH.**

<table>
<thead>
<tr>
<th></th>
<th>Importance</th>
<th>Satisfaction</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost of Travel</td>
<td>71%</td>
<td>92%</td>
<td>+21%</td>
</tr>
<tr>
<td>Friendliness of the Locals</td>
<td>75%</td>
<td>90%</td>
<td>+15%</td>
</tr>
<tr>
<td>Overall Cleanliness of the Destination</td>
<td>81%</td>
<td>92%</td>
<td>+12%</td>
</tr>
<tr>
<td>Safety &amp; Security</td>
<td>87%</td>
<td>96%</td>
<td>+9%</td>
</tr>
</tbody>
</table>
They Love Us

**ANNAPOLIS NET PROMOTER SCORE (NPS)**

Net Promoter Score (NPS) is frequently used as a headline measure of customer loyalty. NPS is very important in determining who is likely to visit again, who is likely to promote the destination to others.

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<table>
<thead>
<tr>
<th>Destination</th>
<th>NPS Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steamboat Springs Colorado</td>
<td>89%</td>
</tr>
<tr>
<td>Town of Vail, Colorado</td>
<td>84%</td>
</tr>
<tr>
<td>Annapolis, MD</td>
<td>83%</td>
</tr>
<tr>
<td>Myrtle Beach Area, SC</td>
<td>83%</td>
</tr>
<tr>
<td>Breckenridge, Colorado</td>
<td>81%</td>
</tr>
<tr>
<td>Bend, Oregon</td>
<td>79%</td>
</tr>
<tr>
<td>Charleston, SC</td>
<td>75%</td>
</tr>
<tr>
<td>Orlando, FL</td>
<td>74%</td>
</tr>
<tr>
<td>Savannah, GA</td>
<td>68%</td>
</tr>
<tr>
<td>Hilton Head, SC</td>
<td>66%</td>
</tr>
<tr>
<td>Ocean City, MD</td>
<td>66%</td>
</tr>
<tr>
<td>Nags Head / Outer Banks, NC</td>
<td>65%</td>
</tr>
<tr>
<td>Ashville, NC</td>
<td>51%</td>
</tr>
<tr>
<td>Nashville, TN</td>
<td>49%</td>
</tr>
</tbody>
</table>
BUT...

WE CAN ALWAYS IMPROVE

“What are some specific things about your stay in Annapolis that could be changed that would improve your overall satisfaction with your trip?”