



2019 Annapolis Visitor Intercept Research

EXECUTIVE SUMMARY

Visitation Assessment &
Destination Satisfaction Study

JANUARY 2020



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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
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Survey Sample

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.

VISITOR PROFILE

PRIMARY REASON
FOR VISITING

54%

LEISURE VISIT

AVERAGE
PARTY SIZE

3.18

PEOPLE

AVERAGE LENGTH
OF STAY

3.22

DAYS

OVERNIGHT
VISITORS

69%

SPENT THE NIGHT

PRIMARY
ACCOMMODATIONS

51%

STAYED IN A HOTEL

HOUSEHOLD
INCOME

\$95k

AVERAGE INCOME

Events Draw

48%

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

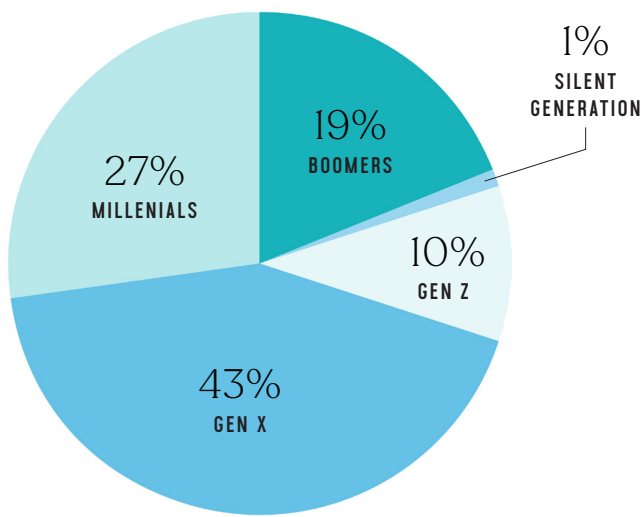
On average, event
attendees stayed longer
and spent more per
trip than the average
Annapolis visitor.



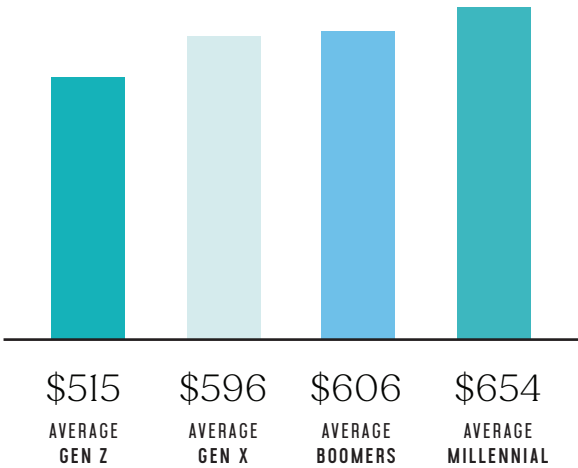
Visitor Profile

GENERATIONAL COHORTS

SHARE OF BY GENERATION



SHARE OF BY OVERNIGHT SPENDING



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

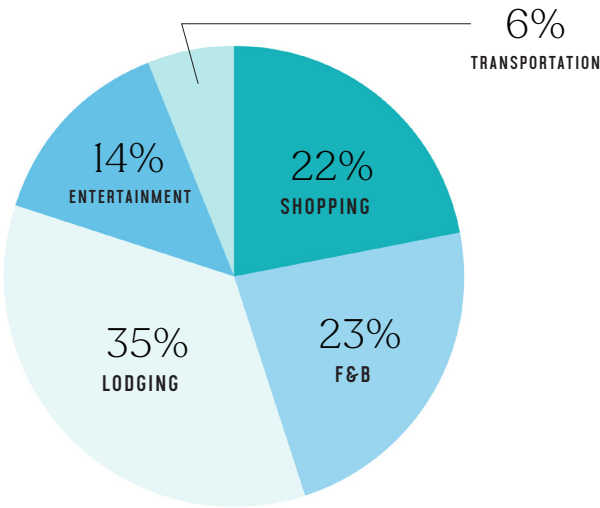
were much more likely than other visitors to stay in a short-term vacation rental.



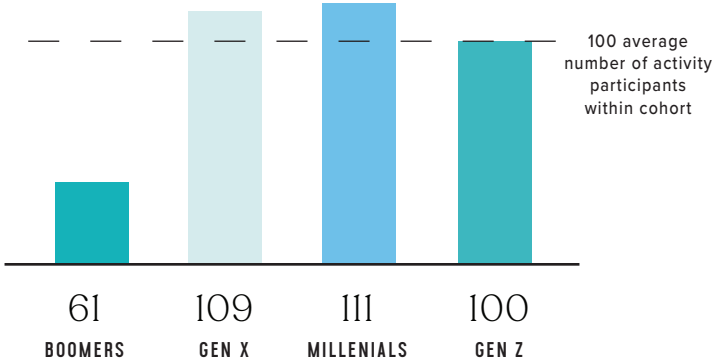
Arts & Culture Visitor

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



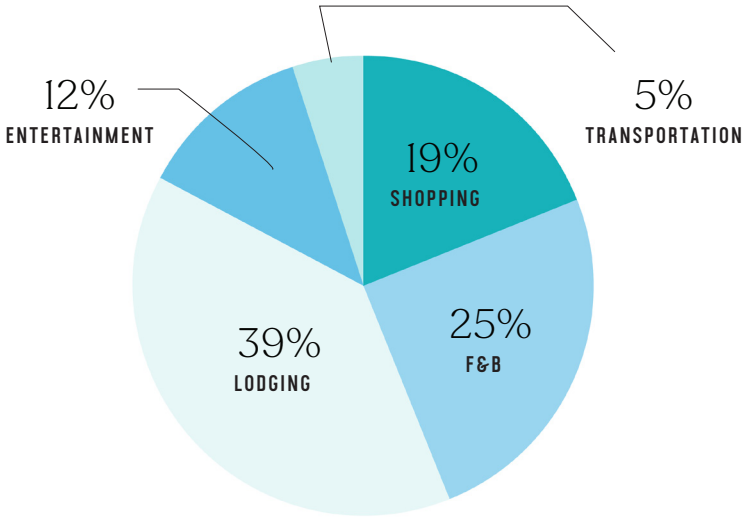
ARTS & CULTURE INDEX SCORES BY GENERATIONAL COHORT



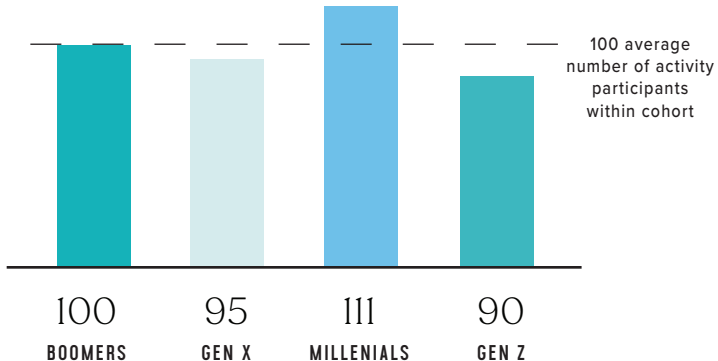
Culinary Visitor

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



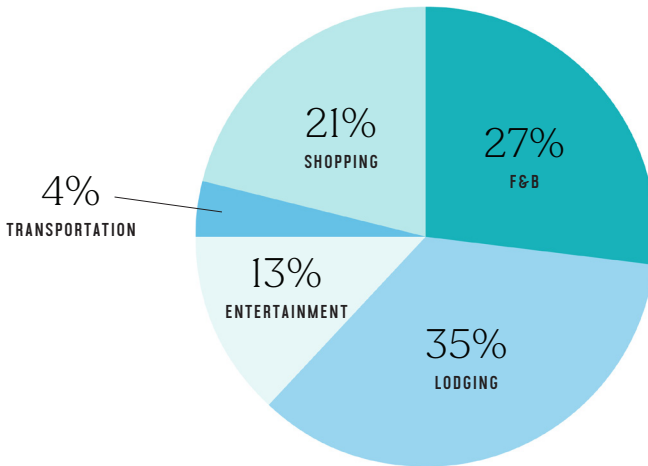
CULINARY & DINING INDEX SCORES BY GENERATIONAL COHORT



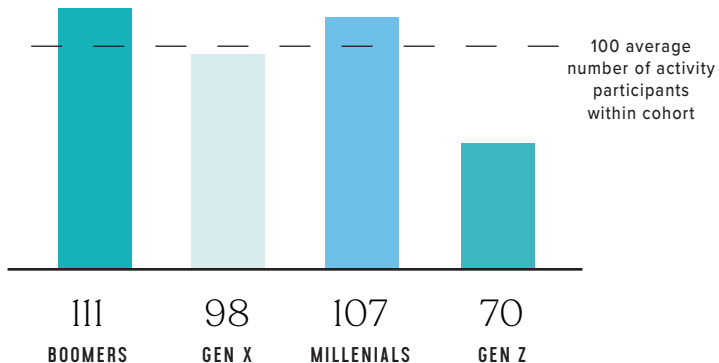
Maritime Visitor

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 stay. Maritime visitors also had a significantly higher average household income.

AVERAGE SPEND PER OVERNIGHT VISITOR: \$701



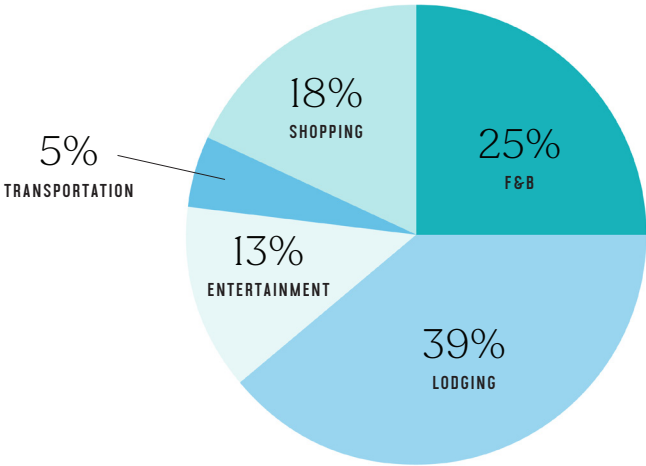
MARITIME ACTIVITY INDEX SCORES BY GENERATIONAL COHORT



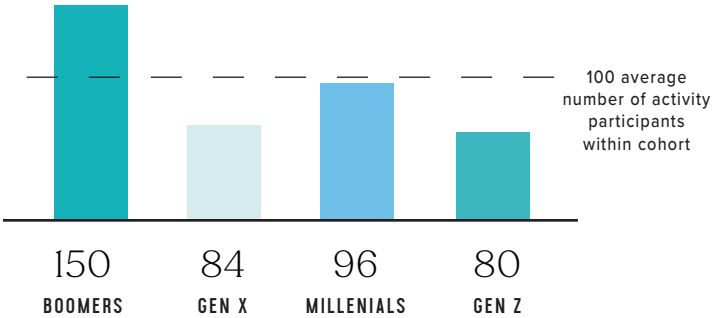
History Visitor

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



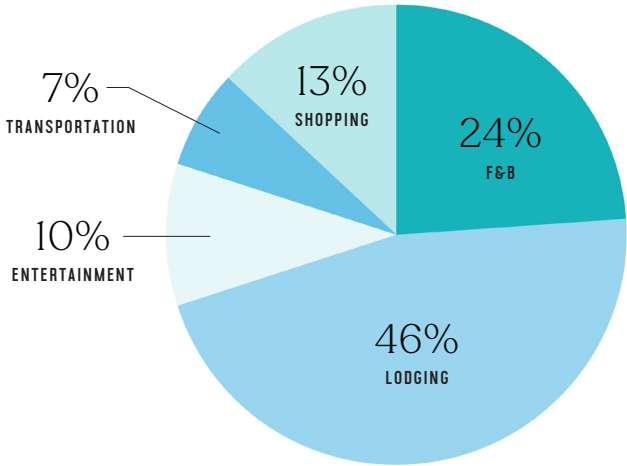
HISTORY ACTIVITY INDEX SCORES BY GENERATIONAL COHORT



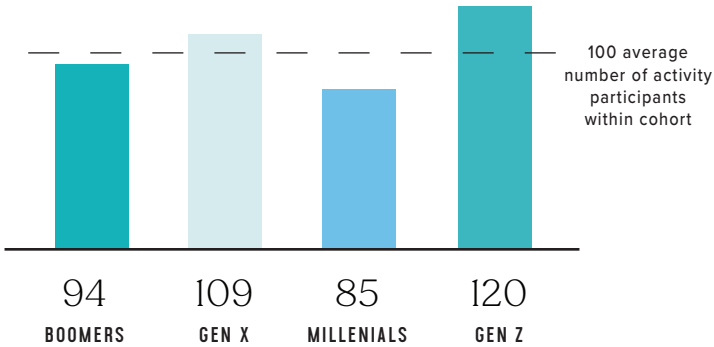
Business Visitor

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



BUSINESS ACTIVITY INDEX SCORES BY GENERATIONAL COHORT



Importance vs. Satisfaction

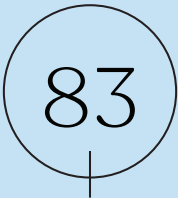
Annapolis visitors are highly satisfied with their visit. When asked about four key attributes and their feeling of importance to their visit compared to their satisfaction during the stay,
ANNAPOLIS RANKED EXTREMELY HIGH.

	Importance	Satisfaction	Difference
Cost of Travel	71%	92%	+21%
Friendliness of the Locals	75%	90%	+15%
Overall Cleanliness of the Destination	81%	92%	+12%
Safety & Security	87%	96%	+9%

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.



EXTREMELY HIGH

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

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



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