

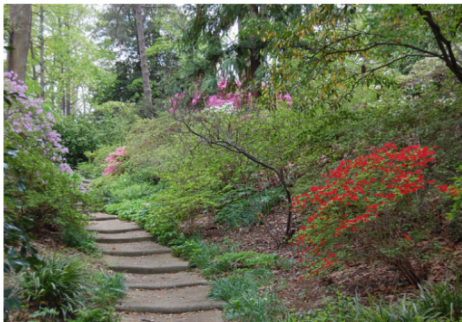
2019 Annapolis Visitor Intercept Research

Visitation Assessment & Destination Satisfaction Study



December 2019

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Annapolis Visitor Profile and Sentiment Results Highlights

- **Annapolis visitors participating in the survey are highly educated** with nearly 80% holding at least a bachelor's degree and average household incomes of \$95k. **Survey responses were well distributed across age and gender groups** : 40% were male, 45% female and 15% answered as a couple; the average age of all respondents was 43 with 38% under the age of 40, 42% between the ages of 40 and 54 and 20% aged 55 or older.
- The **average party size of survey respondents was 3.18** people and the **average length of stay was 3.22 days**. More than half of visitors came primarily for leisure (includes visiting friends or relatives) with 37% visiting for both business and leisure and 9% visiting exclusively for business. **Over one-quarter of visitors surveyed were visiting Annapolis for the first time.**
- **Nearly 7 out of 10 respondents surveyed stayed overnight** in Annapolis and **more than half of respondents (55%) visited from outside of the state**. Among overnight visitors, 28% stayed with friends and relatives while the remainder (63%) stayed in paid accommodations, including hotels or motels (51%), vacation rentals (10%) and traditional B&Bs (2%). There were an additional 7% of respondents that stayed aboard a boat and 2% that stayed in 'other' accommodations.
- **Major events are a significant draw to Annapolis with 48% of respondents attending** either the Annapolis Boat Shows, Naval academy Commissioning Week, a Navy football game or a wedding or family gathering. These events help area businesses by driving high-yield visitors to the area: **on average, event attendees stayed longer and spent more per trip than the average Annapolis visitor**. It should be noted that the survey field was not open for two additional major events- the Military Bowl and the Annapolis Film Festival.
- The **largest generational cohort represented in the sample was Gen X**, comprising 43% of responses. Gen Xers had the **longest average length of stay and the highest average party size among all generational cohorts**. They did spend slightly less per visitor on average, likely due to the presence of children in their travel parties.

Annapolis Visitor Profile and Sentiment Results Highlights

- The second **largest generational cohort represented in the sample was the Millennials**, comprising 27% of responses. **Millennials spent an average of \$654 on overnight stays**, higher than the \$638 average-per-trip spent by all overnight visitors. Millennials were more likely to spend a larger proportion of their trip budgets on **entertainment, recreation and shopping**.
- Baby Boomers were the third largest cohort surveyed, **representing 19% of responses**. Boomers have **significantly higher incomes on average** when compared with all Annapolis visitors and are highly educated. Despite their older age, **40% of Baby Boomer respondents were visiting Annapolis for the first time**, the highest percentage among all the generational cohorts.
- Visitors participating in a particular activity- Arts & Culture, History, Maritime, Business or Culinary & Dining Experiences- **were likely to spend more per trip than the average visitors. Maritime visitors had the highest average spend per trip among all activity visitors at \$701** per overnight stay.
- **Annapolis visitors have a relatively high Net Promoter Score (NPS) of 83.** Net promoter scores rose through the spring and into the summer months, peaking at 91 in August. NPS was relatively high across all visitor segments. Some of the highest scores came from Boat Show Visitors (94), Gen Xers (88), Navy Commissioning Week visitors (86) and in-state visitors (85).
- **Annapolis visitors are highly satisfied with various different attributes within the destination.** When measuring top 2 box responses (satisfied + extremely satisfied): 96% of visitors were satisfied with the Safety & Security, 92% of visitors were satisfied with the overall cleanliness of the destination, 92% of visitors were satisfied with the cost of travel, and 90% of visitors were satisfied with the friendliness of locals.

About the Study

This report presents the findings of a comprehensive visitor profile and sentiment study conducted by Rockport Analytics on behalf of Visit Annapolis & Anne Arundel County VAAAC. 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.

One challenge with intercept surveys is collecting sample that is representative of the true visitor population and does not include bias by underrepresenting certain subgroups of visitors. We attempted to reduce bias by conducting surveys in different times of the day, different days of the week and in different locations in and around Annapolis.

One of the key goals of the study was to obtain measures of visitors' satisfaction. In order to be able to measure satisfaction, it was important to interview visitors that had been in Annapolis long enough to have valid opinions about the destination. To achieve this we added a qualifier that the visitor must have been in town for at least 4 hours. Respondents also had to reside outside of Anne Arundel County. A total of 1,595 individuals were invited to participate in the survey with 75% qualifying to participate.

Total invited to Participate	Total residing outside of AAC	Total in town for 4+ hours
1,595	1,273	1,193

Results from this analysis are based on responses from 1,193 completed surveys. The total margin of error for the survey is +/- 2.5%. The table below shows the number of surveys administered at each location:

Location	City Dock	Visitor Center	Other
Sample Size	412	347	810

Even though we have taken great care to collect the most representative and valid sample possible, a couple of caveats exist when interpreting the data:

- We are likely over-estimating overnight trips by virtue of the 4 hour qualifier
- We may be underrepresenting certain visitor segments that are less likely to be around city dock or entering the visitor's center.
- We did not survey through the winter months so we may be missing certain sub-groups of visitors more likely to visit during that time of year.

Below is a table summarizing the total number of completed surveys collected by month:

Month	April	May	June	July	August	September	October
Sample Size	25	58	128	198	157	254	373

About Visit Annapolis & Anne Arundel County (VAAAC)

VAAAC is a nonprofit, membership-based, destination marketing organization that generates revenues for the local economy by promoting Annapolis and Anne Arundel County to leisure and business travelers across the country and around the world. As a marketing organization, they execute campaigns that position their portfolio of brands to key markets to encourage first time and repeat visitation. Their strategy combines multi-channel advertising, inbound marketing campaigns, direct sales initiatives, and continued media relationship nurturing.

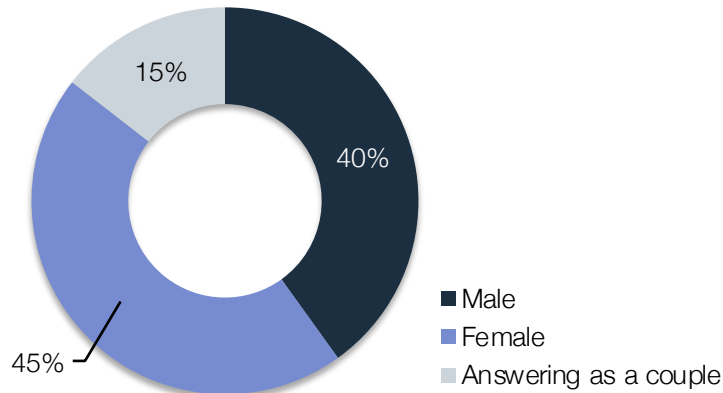
About Rockport Analytics

Rockport is a research and analytical consulting firm providing high quality quantitative and qualitative research solutions to business, government, and non-profit organization clients across the globe. They provide fast, nimble service in a transparent environment.

Capabilities include:

- Market Analysis and Forecasting
- Visitor Research
- Market Modeling and Decision Support Tools
- Primary and Secondary Research Synthesis
- Stakeholder Surveys – internal & external
- Economic Impact Assessment

Annapolis Visitor Gender

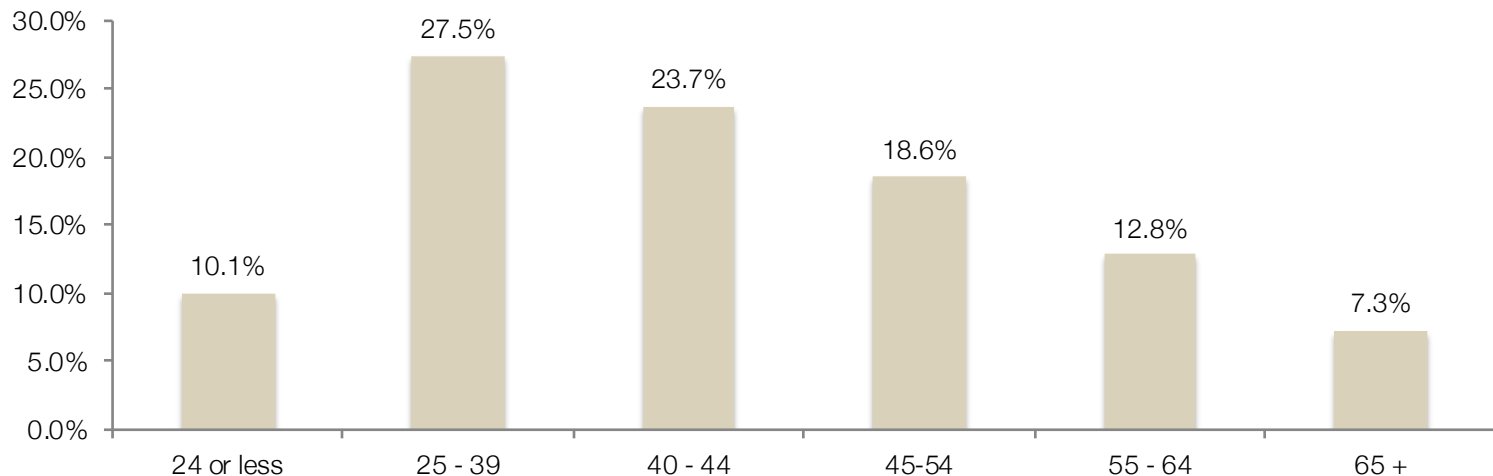


- ✓ In total, 45% of survey respondents were female, 40% were male and 14% answered the survey as a couple.
- ✓ Survey respondents were well distributed across age cohorts. Almost 28% of respondents were between the ages of 25 and 39 and more than 37% of them were less than 39 years of age.
- ✓ Respondents between the ages of 40 to 64 make up more than half (55%) of visitors sampled. Of these, individuals in their early 40s (40 to 44) made up almost 24% of respondents.

N=939

Base=All Respondents excluding those specifying 'other'

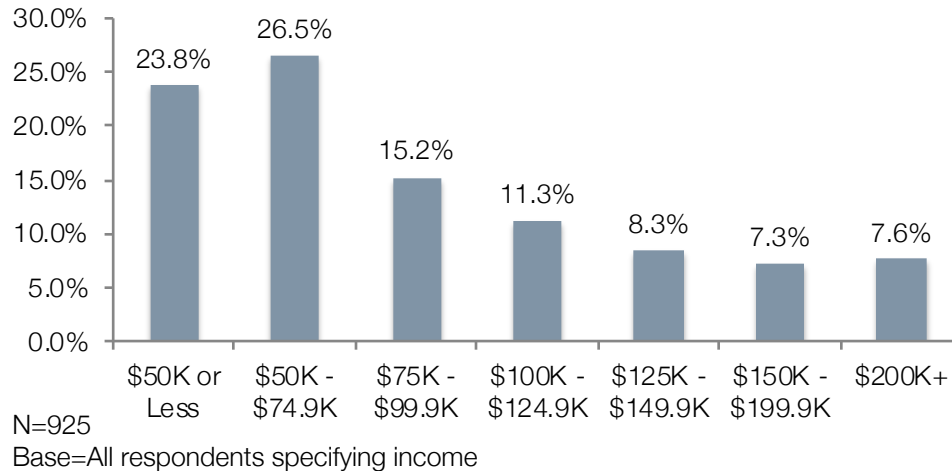
Annapolis Visitor Age Distribution



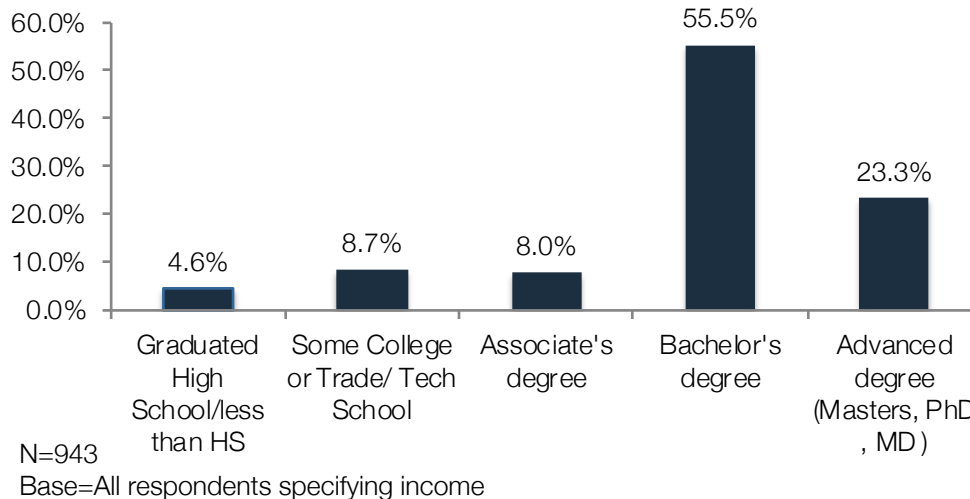
N=943

Base= All respondents specifying age

Annapolis Visitor: Household Income Distribution



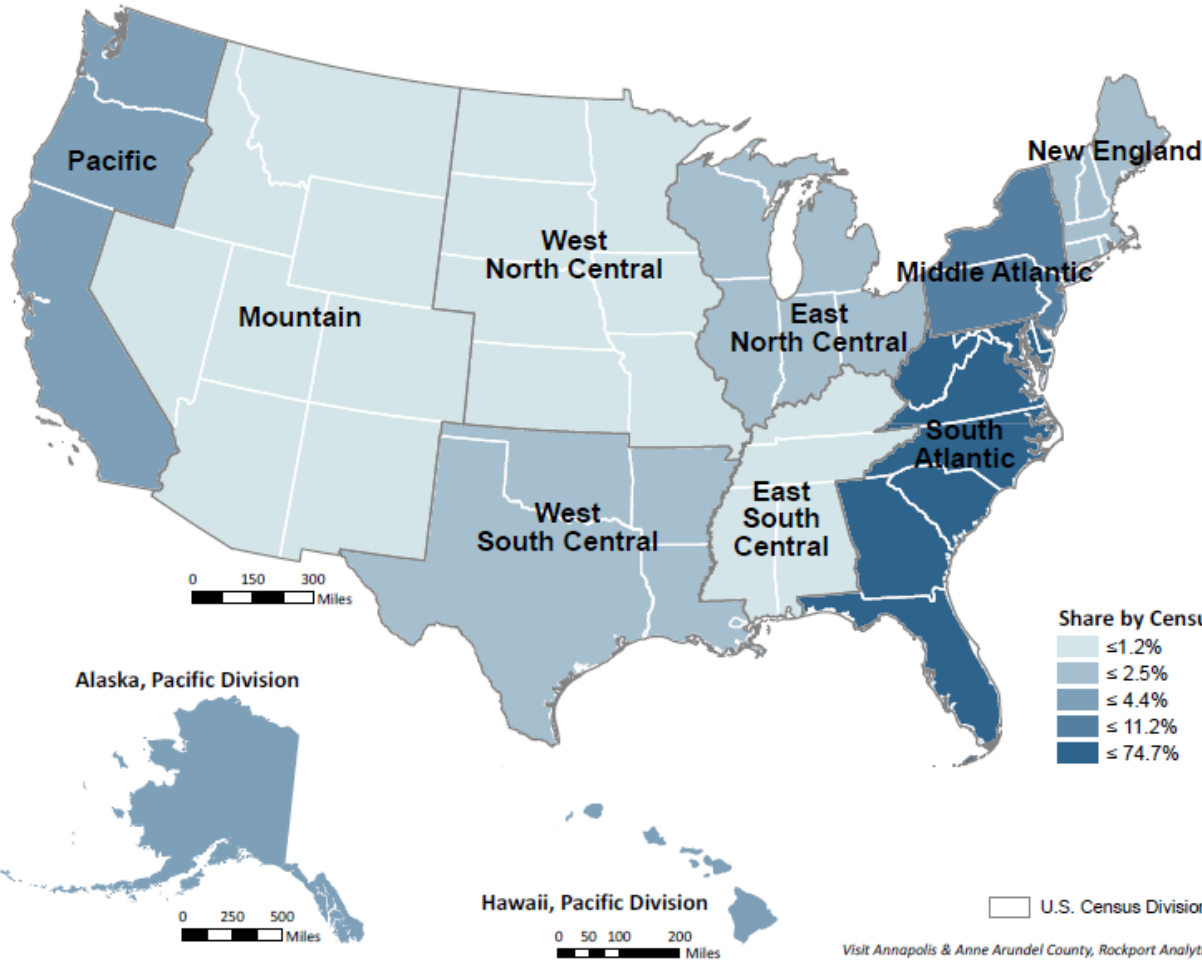
Annapolis Visitor: Highest Level of Educational Attainment



- ✓ Respondents with a household income of less than \$75,000 make up roughly half (50.3%) of visitors.
- ✓ Visitors with a household income between \$75,000 to \$125,000 represent the second largest group with more than 26%.
- ✓ Not surprisingly, there is a strong correlation between visitor age and income. Of the respondents reporting a household income of under \$50k, 57% are under the age of 40.
- ✓ Visitors to Annapolis are highly educated. Nearly 79% of visitors hold at least a bachelor's degree, with 23% holding an advanced degree (Masters, PhD or MD).
- ✓ Approximately 13% of visitors were high school graduates or had some years of post-secondary education.

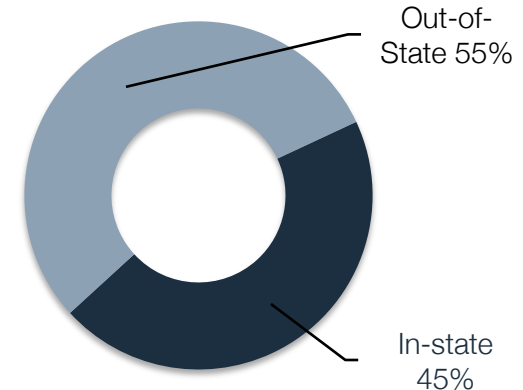
Visitor Origin by Census Division

Share of Survey Respondents by Census Division of Origin



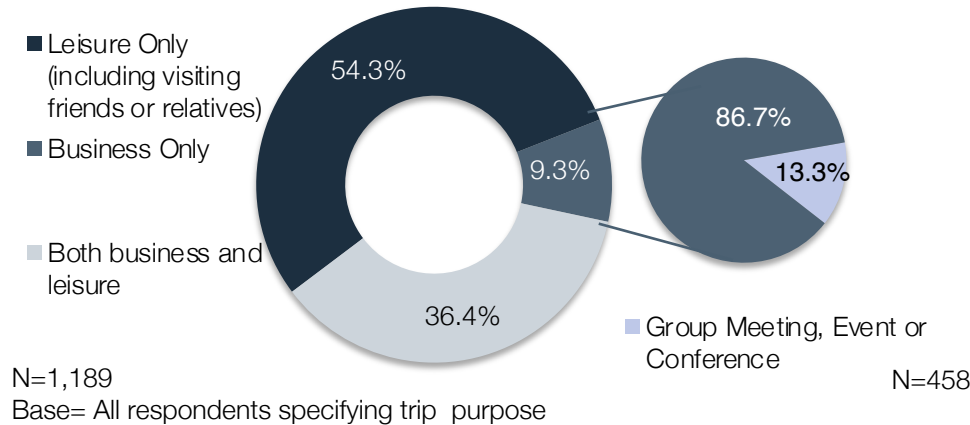
- ✓ The largest share of survey respondents were from the South Atlantic Census Division which includes Maryland D.C., Delaware, Virginia, West Virginia, North Carolina, South Carolina, Georgia and Florida.
- ✓ More than half of respondents (55%) visited from outside of Maryland.
- ✓ The second largest origin market for Annapolis visitors was the Middle Atlantic, which includes Pennsylvania, New Jersey and New York.

Visitor Origin: In-state vs Out-of-state



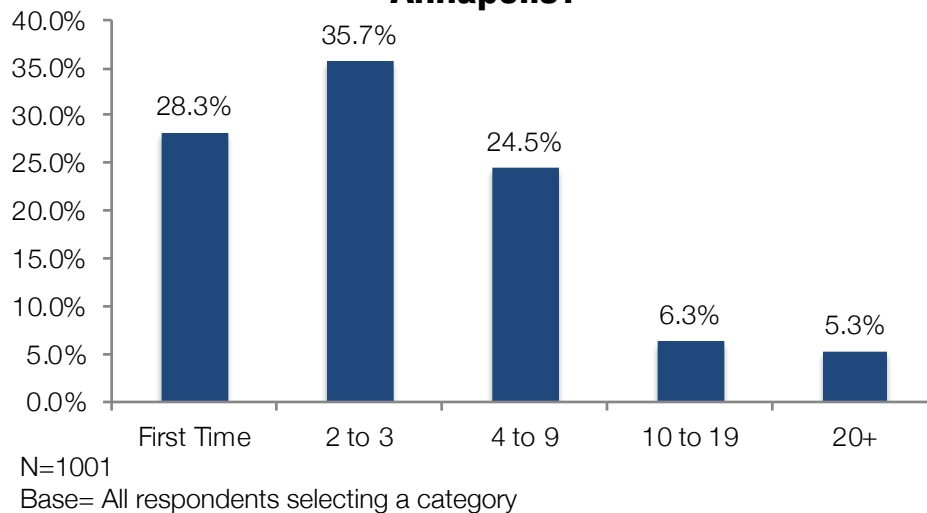
Visitor Trip Purpose and Number of Visits

Purpose of Visitor's Trip



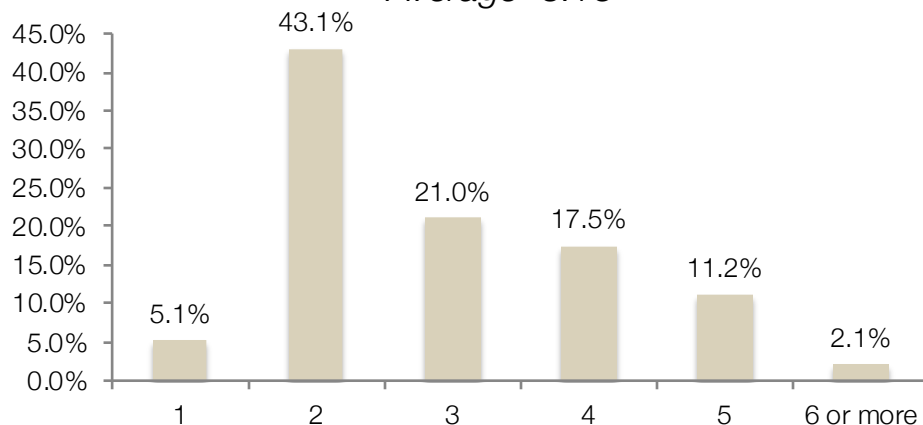
- ✓ More than half of visitors to Annapolis came primarily for leisure purposes.
- ✓ An additional 36% traveled for a combination of leisure and business.
- ✓ Only 9% of visitors traveled solely for business. Of those visitors, 13% attended a specific group business event such as a conference while the other 87% traveled for general (transient) business purposes.
- ✓ Approximately 28% of respondents were visiting Annapolis for the first time. The remaining 72% were repeat visitors.
- ✓ Nearly two-thirds of respondents had visited three times or less while just shy of 12% of respondents had visited ten times or more.

How Many Times Have You Visited Annapolis?



Travel Party Size

Average=3.18



N=975

Base= All respondents selecting a party size

- ✓ The average party size for visitors to Annapolis in 2019 was 3.18 people and 43% of respondents traveled in pairs.
- ✓ Nearly 7 in 10 respondents had a travel party size between 1 to 3 people.
- ✓ Roughly 30% of visitors belong to party sizes of 4 or more.
- ✓ Business travelers had a smaller average party size than leisure travelers (2.8 vs 3.2).
- ✓ Visitors who stayed in paid accommodations had larger average party sizes than those who stayed with friends or relatives.
- ✓ The average party size for in-state visitors was smaller than the party size among out-of-state visitors (2.7 vs 3.2).

Party Size and Purpose	Mean	N
Leisure only (incl visiting friends/relatives)	3.23	524
Business only	2.80	88
Both business and leisure	3.19	357

Party Size and Day Vs Overnight	Mean	N
Day	2.80	300
Overnight	3.35	669

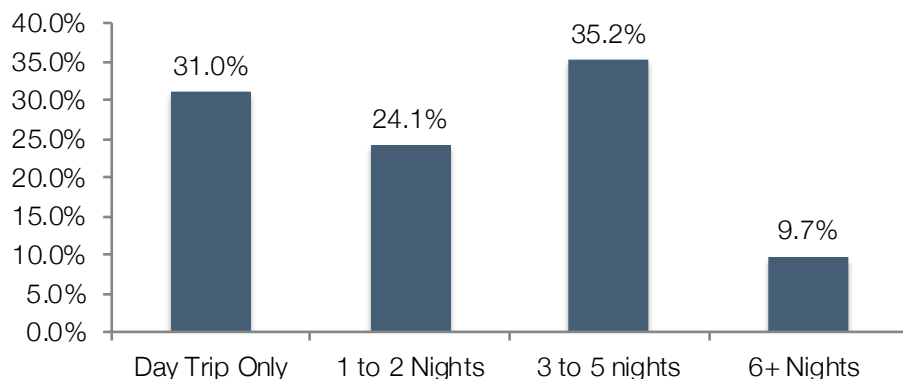
Party Size and In-State vs Out-of-State	Mean	N
In-State	2.73	296
Out-of-State	3.23	367

Party Size and Primary Accommodations	Mean	N
Hotel or Motel	3.36	310
Staying with friends /relatives	2.96	169
Vacation rental (Airbnb, Homeaway, VRBO)	3.33	61
Bed & Breakfast	2.77	13
Staying aboard a boat	3.76	41
Other (please specify)	2.56	9

Visitor Length of Stay (LOS)

Length of Stay

Average=3.22



N=975

Base= All respondents selecting a length of stay

- ✓ The average length of stay in Annapolis reported by visitors was 3.2 days. Roughly 31% of visitors took a day trip.
- ✓ More than on-third of visitors stayed between 3 to 5 nights.
- ✓ Leisure travelers stayed longer on average than those traveling for business (3.2 days vs 2.8 days).
- ✓ On average, visitors who stayed in paid accommodations had a longer length of stay than visitors staying with friends and relatives.
- ✓ The average of stay for respondents traveling from outside of Maryland was longer than those from within the state (3.2 vs 2.6)
- ✓ The average length of stay for respondents traveling on weekends was slightly shorter than the stay for respondents interviewed during the week.

LOS and Purpose	Mean	N
Leisure only (incl visiting friends/relatives)	3.23	525
Business only	2.80	87
Both business and leisure	3.19	356

LOS and Day vs Overnight	Mean	N
Weekday	3.45	633
Weekend	2.77	336

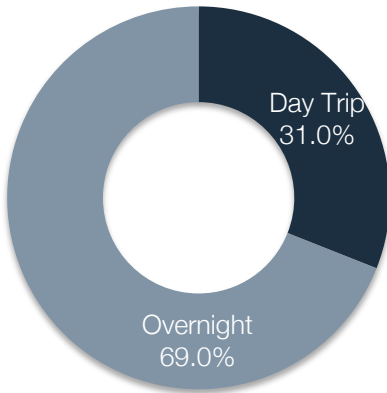
LOS and In-State vs Out-of-State	Mean	N
In-State	2.73	296
Out-of-State	3.23	367

LOS and Primary Accommodations	Mean	N
Hotel or Motel	3.13	310
Staying with friends /relatives	3.10	170
Vacation rental (Airbnb, Homeaway, VRBO)	3.12	61
Bed & Breakfast	2.81	13
Staying aboard a boat	3.56	41
Other (please specify)	3.28	9

Visitor Primary Accommodations

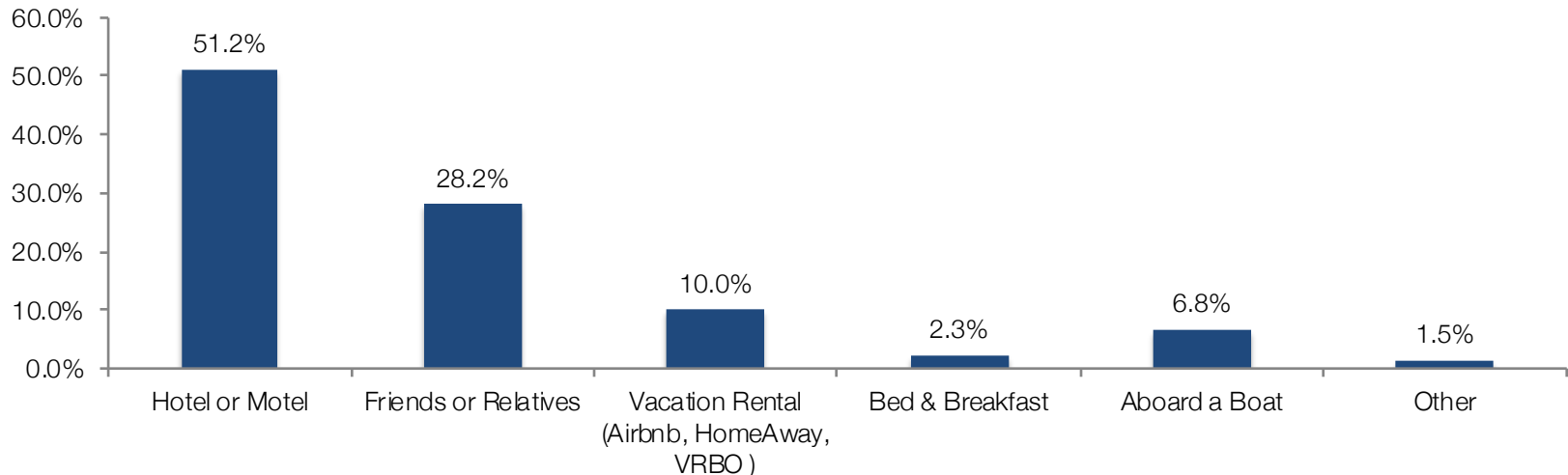
Day vs Overnight Stay:

All Annapolis Visits



- ✓ Nearly 7 out of 10 respondents surveyed stayed overnight in Annapolis.
- ✓ Of those overnight visitors, slightly more than 28% of visitors stayed with friends and relatives with the remainder (72%) staying in some sort of paid accommodations.
- ✓ More than half (51%) of overnight visitors stayed in a hotel or motel. Visitors staying at a hotel or motel had an average party size of 3.36 people and on average stayed for 3.13 days.
- ✓ 10% of overnight visitors stayed in a short term vacation rental. These visitors had a longer-than-average length of stay and larger-than-average travel parties.

Primary Accommodation Type Amongst All Overnight Visitors



N=607

Base= All respondents traveling overnight and selecting an accommodations category

48% of Annapolis Visitors Surveyed Attended One of These Major Events...

The Annapolis Boat Shows



- ✓ 25% of respondents attended one of the Boat Shows
- ✓ On average, attendees spent 1.2x more per trip than the average visitor
- ✓ 46% of Boat Show attendees surveyed were Gen Xers
- ✓ 55% of Boat Show attendees stayed in a hotel/motel
- ✓ 11% stayed aboard a boat, compared to 7% of all visitors to Annapolis

Wedding or Family Gathering



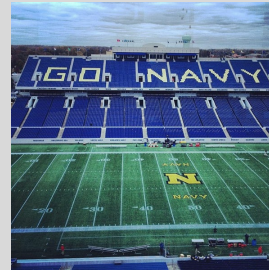
- ✓ 8% of respondents attended a wedding or family gathering
- ✓ On average, these visitors spent 1.7x more per trip than the average visitor
- ✓ Wedding visitors tend to have larger party sizes on average: 4.3 vs. 3.2 for all visitors
- ✓ 44% stayed with friends/ relatives
- ✓ These visitors skew somewhat younger – Millennials were the largest cohort of wedding attendees @ 38%

Naval Academy Commissioning Week



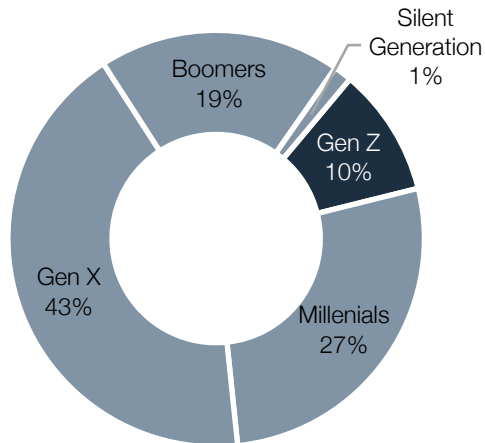
- ✓ 6% of respondents took part in the Naval Academy's Commissioning Week
- ✓ On average, these visitors spent 1.6x more per trip than the average visitor
- ✓ 51% of these Commissioning Week visitors were first time visitors
- ✓ 46% of Commissioning Week visitors were Gen Xers
- ✓ 28% stayed in a vacation rental, reflecting family travel and room compression

Navy Football Games



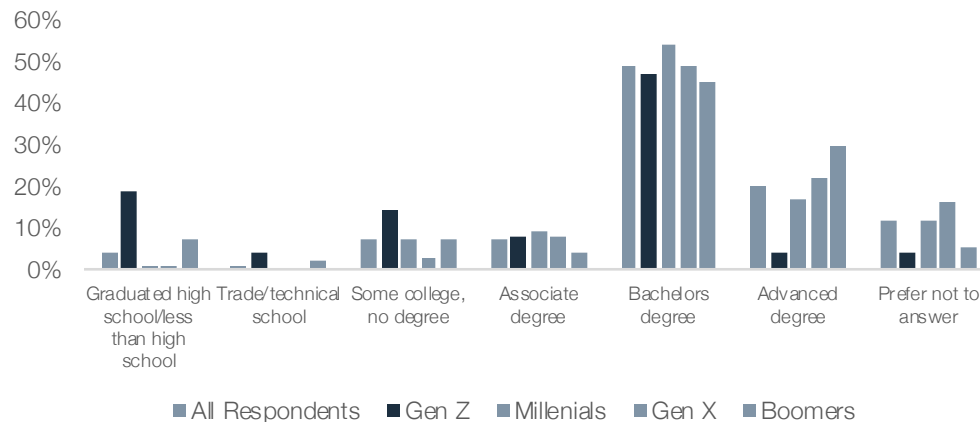
- ✓ 9% of respondents attended a Navy football game
- ✓ On average, attendees spent 1.6x more per trip than the average visitor
- ✓ A significant proportion, 61%, traveled from out of state and nearly 84% were first time visitors
- ✓ 42% Navy football game visitors were Gen Xers
- ✓ 8% of football game visitors stayed aboard a boat

Generational Cohorts: Share of Annapolis Visitor Respondents

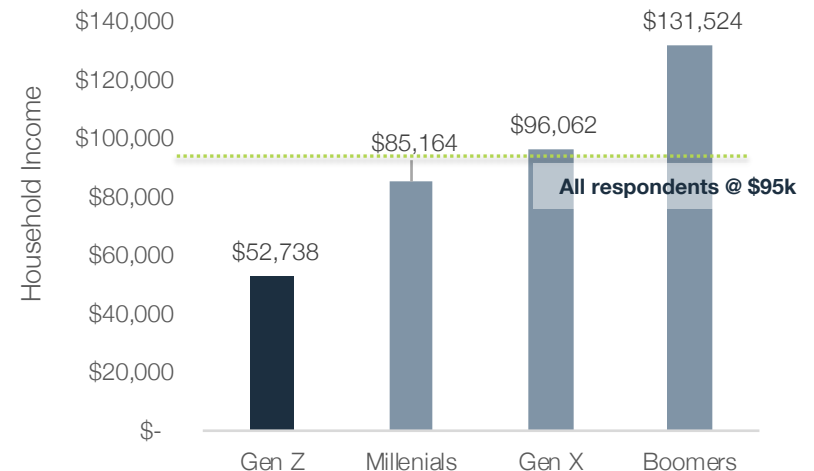


- ✓ Gen Z respondents are 24 years or younger and represent roughly 10% of survey respondents. They are one of the smallest cohorts in the sample, second only to the “silent generation”, those who are 75 years of age or older.
- ✓ The average household income of survey respondents in this generational cohort is approximately \$53,000, significantly lower than the average income of all visitors.
- ✓ Because of their age, this cohort is less likely than others to have earned advanced degrees and have the lowest percentage of respondents with Bachelor's degrees.

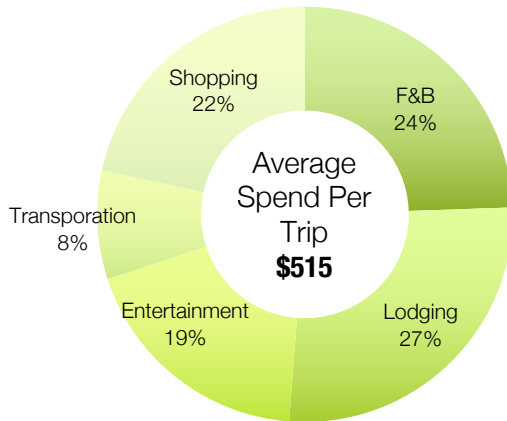
Highest Level of Educational Attainment By Generational Cohort



Mean Household Income Among Visitors By Generational Cohort



Overnight Annapolis Trip Spending by Category: Gen Z



Primary Accommodations

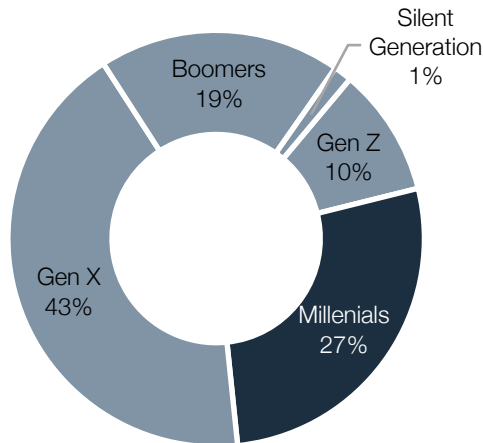


- ✓ On average, Gen Z survey respondents stayed in Annapolis for 3.1 days and the size of their travel party was 2.6; about 28% of Gen Zers were visiting Annapolis for the first time.
- ✓ Roughly 58% of these visitors came from outside Maryland, compared to 55% of all Annapolis visitors that came from out-of-state.
- ✓ More than 40% were visiting on a day trip, a significantly higher proportion than the 31% of all Annapolis visitors.
- ✓ Of those who stayed overnight, more than 65% stayed in paid accommodations and Gen Z visitors were much more likely than other visitors to stay in a short-term vacation rental.
- ✓ Gen Z overnight visitors spent an average of \$515 during their stay, the lowest average across all generational cohorts.
- ✓ Gen Z respondents spent a significantly larger share of their trip budget on entertainment than other cohorts and a slightly larger share than other cohorts on shopping.

	Gen Z	All Annapolis Visitors
Average Party Size	2.65	3.18
Average Length of Stay	3.14	3.22
Day Trip Share of Total	41%	31%
Out-of-State Share of Total	58%	55%
First-time Visit	28%	28%

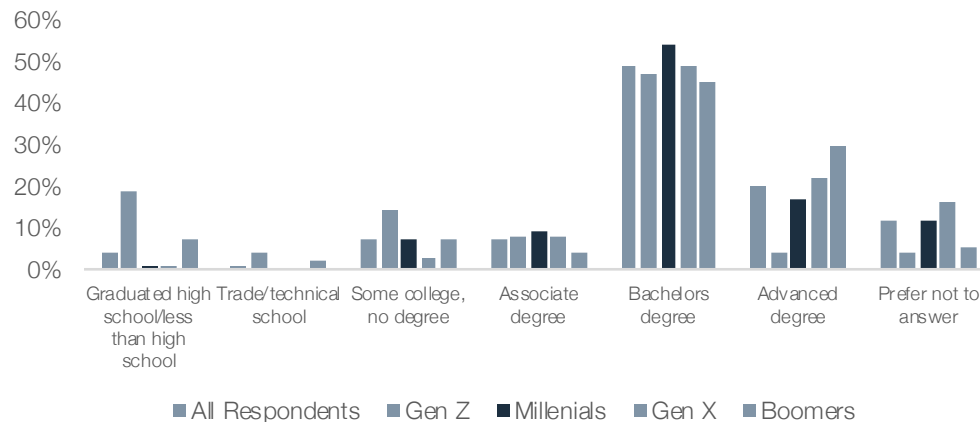
Annapolis Millennial Visitors: Demographics

Generational Cohorts: Share of Annapolis Visitor Respondents

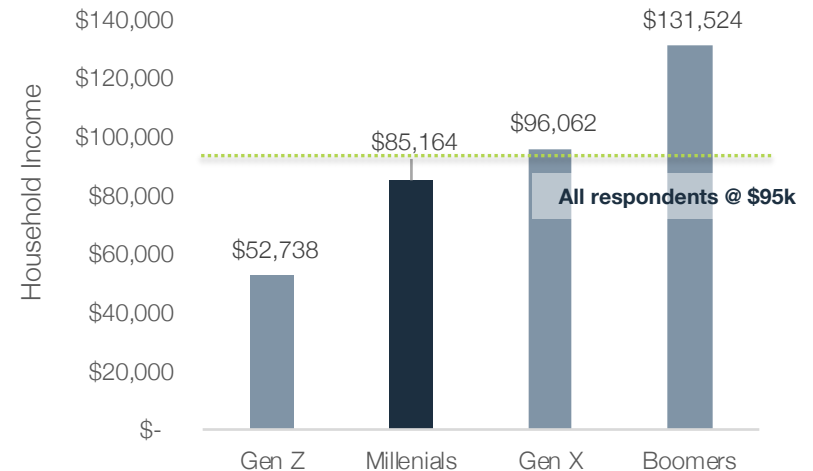


- ✓ Respondents from the Millennial cohort are between the ages of 25 to 39 and they represent 27% of respondents. They are the second largest cohort in the survey sample trailing only Gen X.
- ✓ The average household income of respondents in this cohort is approximately \$85,000, which is about \$10k less than the average income across all Annapolis visitors.
- ✓ Millennial visitors are relatively educated with 54% obtaining Bachelor's degrees and another 17% obtaining advanced degrees of some sort.

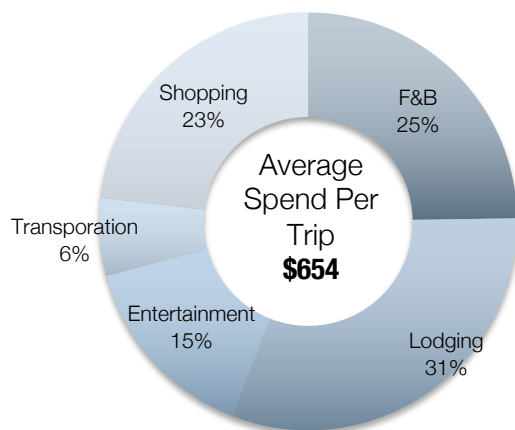
Highest Level of Educational Attainment By Generational Cohort



Mean Household Income Among Visitors By Generational Cohort

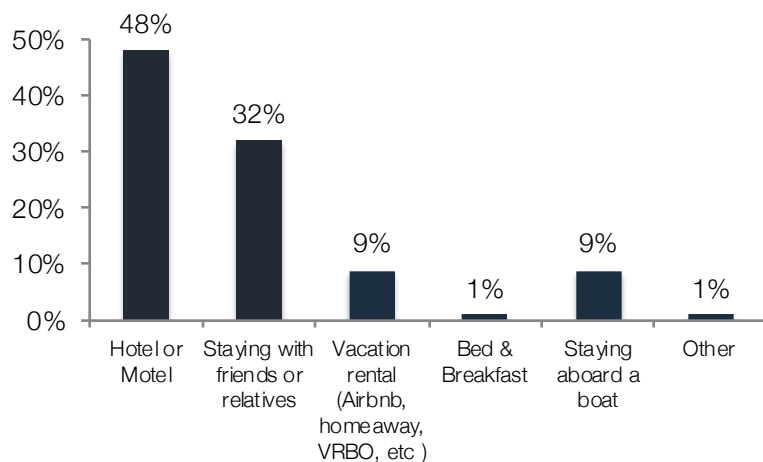


Overnight Trip Spending by Category: Millennial



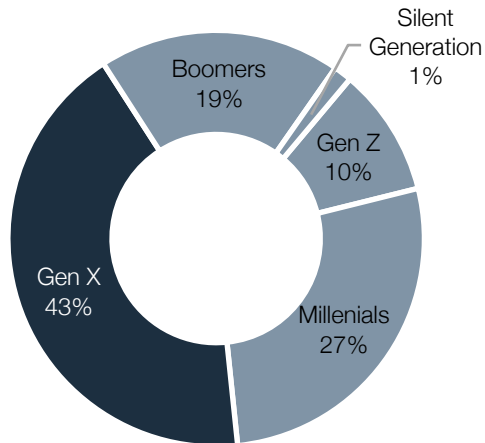
- ✓ On average, Millennial visitors stayed for 3.6 days, significantly longer than other visitors and the average size of their travel party was 3.1, slightly smaller than the average for all visitors.
- ✓ Despite their relatively young age, only 22% of Millennials were first time visitors to Annapolis.
- ✓ About 47% of Millennials came from outside of Maryland and nearly one-third (32%) were on day trips. Of those who spent the night, more than 58% stayed in paid accommodations.
- ✓ Millennials spent an average of \$654 during their overnight trip, higher than the \$638 average-per-trip spent by all overnight visitors.
- ✓ Like their Gen Z counterparts, Millennials are more likely to spend more of their trip budget on entertainment and shopping than older cohorts.

Primary Accommodations



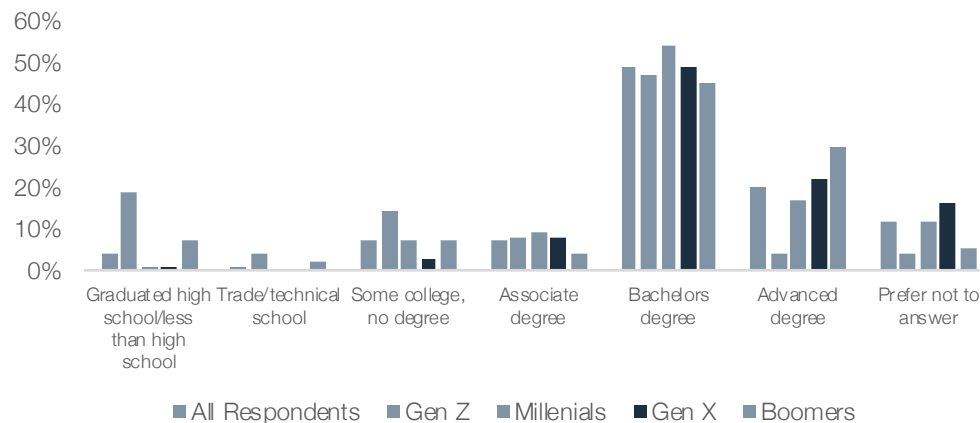
	Millennial	All Annapolis Visitors
Average Party Size	3.11	3.18
Average Length of Stay	3.66	3.22
Day Trip Share of Total	32%	31%
Out-of-State Share of Total	47%	55%
First-time Visit	22%	28%

Generational Cohorts: Share of Annapolis Visitor Respondents

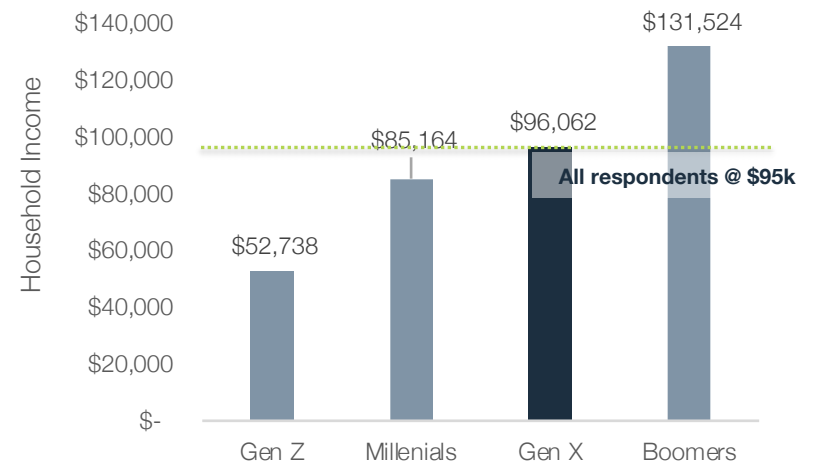


- ✓ The Gen X cohort is made up of individuals aged 40 to 54 and they comprise 43% of the respondents, by far the largest generational cohort represented in the sample.
- ✓ The average household income of respondents in this cohort is approximately \$96,000, right on par (or slightly above) the average of all Annapolis visitors.
- ✓ The highest level of educational attainment achieved by Gen Xers is a Bachelors degree for just under half (49%) of the cohort. Another 22% have acquired an advanced degree. 14% of Gen Xers did not report their highest level of educational attainment.

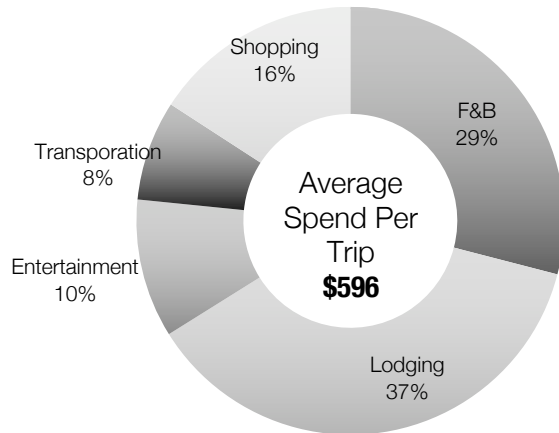
Highest Level of Educational Attainment By Generational Cohort



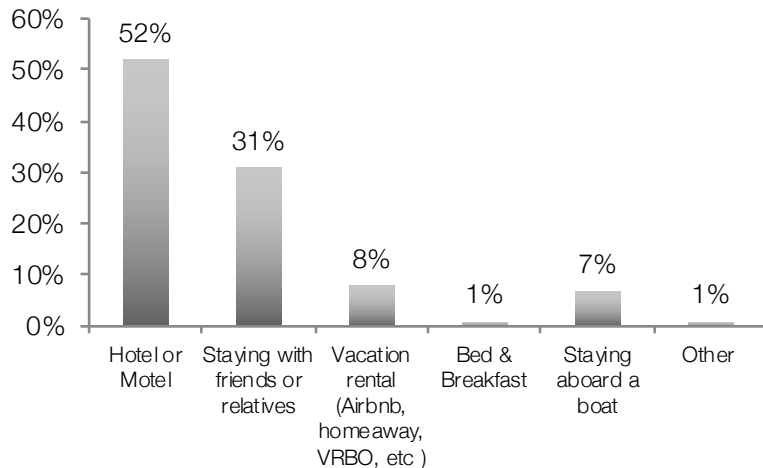
Mean Household Income Among Visitors By Generational Cohort



Overnight Spending by Category: Gen X



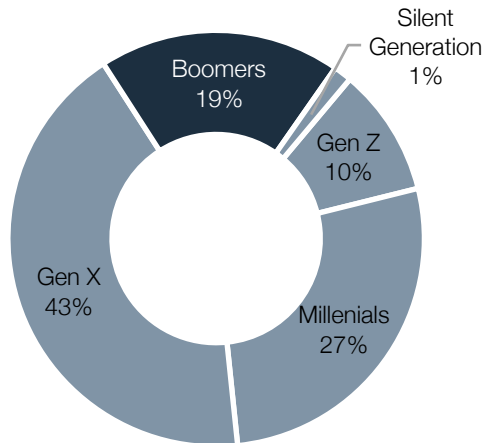
Primary Accommodations



- ✓ On average, Gen Xers stayed in Annapolis for 3.7 days and the average size of their travel parties was 3.4. This represents the longest average length of stay and the largest average travel party size among all generational cohorts.
- ✓ Gen Xers had a larger proportion of overnight trips than other cohorts (71%). About one third of Gen X respondents (31%) stayed with friends and relatives and just over half stayed in a hotel.
- ✓ Gen X survey respondents had an average trip spend of \$596, which is slightly lower than the average for all visitors. This is likely driven by a higher proportion of children in the travel party of Gen X visitors.
- ✓ Gen Xers are more likely than other cohorts to spend a larger proportion of their trip budgets on food and beverage.

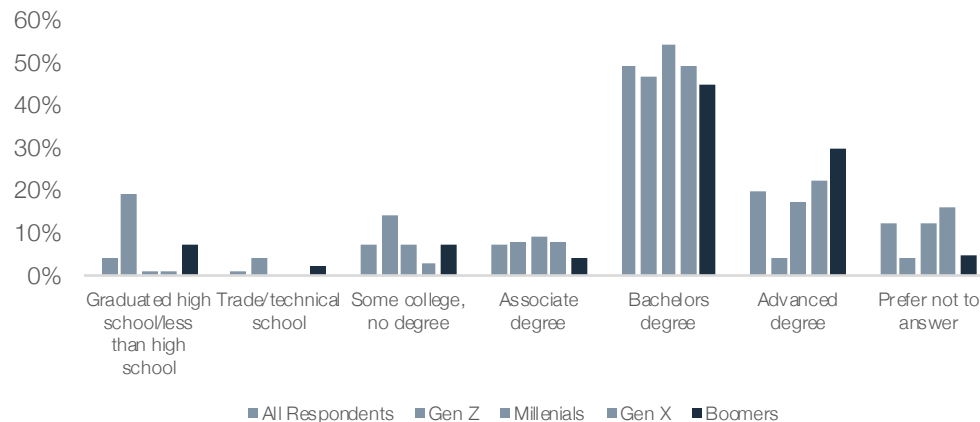
	Gen X	All Annapolis Visitors
Average Party Size	3.39	3.18
Average Length of Stay	3.68	3.22
Day Trip Share of Total	29%	31%
Out-of-State Share of Total	46%	55%
First-time Visit	28%	28%
Attended Major Event	61%	61%

Generational Cohorts: Share of Annapolis Visitor Respondents

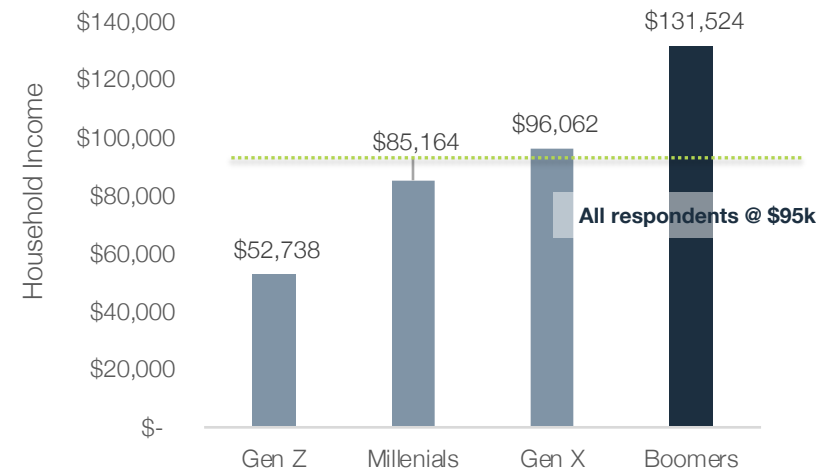


- ✓ The Boomer cohort includes individuals with ages 55 to 74 and they made up 19% of all visitor responses, the third largest cohort after Gen Xers and Millennials.
- ✓ The average household income of Boomer visitors is just over \$131k, the highest of all generational cohorts and over \$35k higher than the average income of all Annapolis visitors.
- ✓ The boomers are highly educated: the highest level of educational attainment was a bachelors degree for 45% and another 30% obtained an advanced degree of some sort.

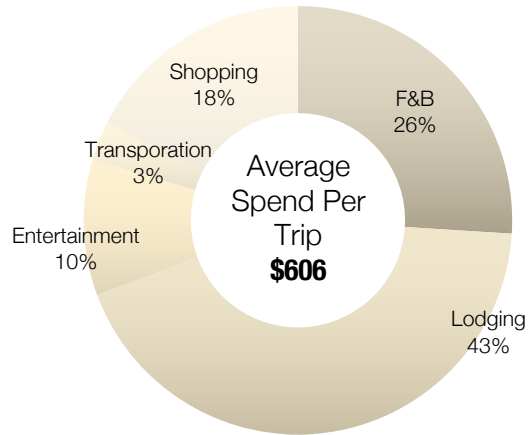
Highest Level of Educational Attainment By Generational Cohort



Mean Household Income Among Visitors By Generational Cohort

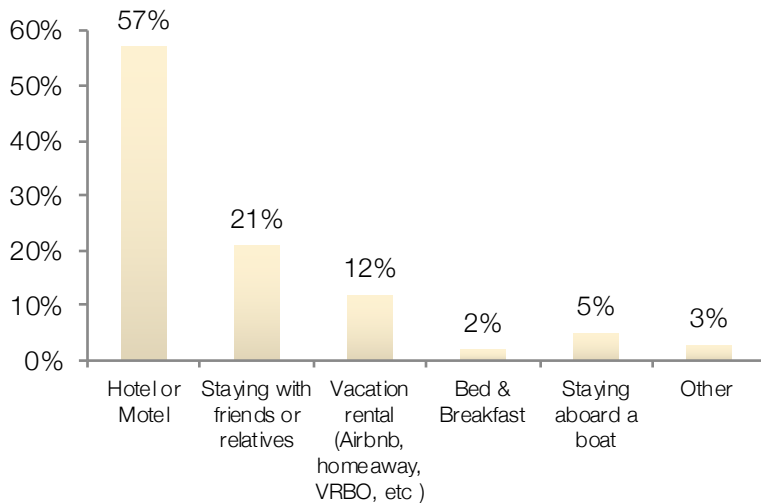


Boomers Spending by Category



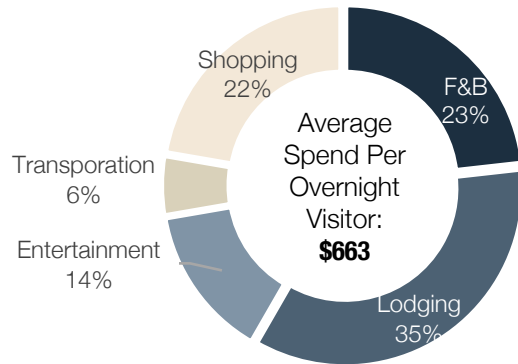
- ✓ Boomer visitors stayed in Annapolis for an average of 3.2 days and the average size of their travel party was 2.8.
- ✓ Compared to other cohorts, the Boomers had the largest percentage of first-time visitors to Annapolis (40%).
- ✓ Boomers had the largest share of visitors who stayed in paid accommodations (71%) with 57% staying in hotels, 12% in a STVR, 2% in a B&B.
- ✓ Boomer survey respondents had an average trip spend of \$606. Boomers spend a significantly larger share of their trip budgets on lodging and significantly smaller share on entertainment.

Primary Accommodations



	Boomers	All Annapolis Visitors
Average Party Size	2.85	3.18
Average Length of Stay	3.20	3.22
Day Trip Share of Total	33%	31%
Out-of-State Share of Total	29%	55%
First-time Visit	40%	28%
Attended Major Event	39%	61%

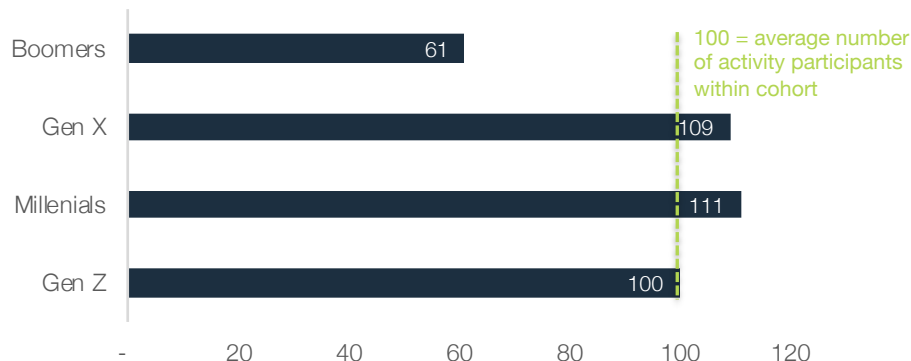
A total of 597 respondents (65% of completed surveys) participated in **Arts & Culture** activities, including- galleries, concerts, theater, and dance- during their stay in Annapolis



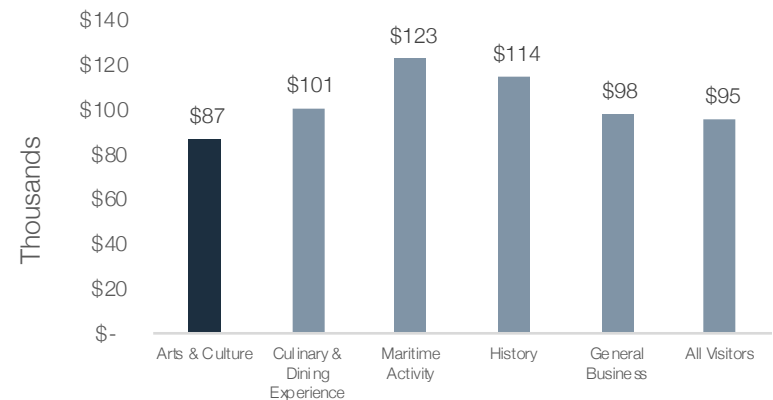
	Arts & Culture Visitors	All Annapolis Visitors
Average Party Size	3.20	3.18
Average Length of Stay	3.76	3.22
Day Trip Share of Total	28%	31%
Out-of-State Share of Total	50%	55%
First Time Visitors?	25%	28%

- ✓ Gen Xers were 9% more likely to participate in Arts and Culture activities than the average visitor and Millennials were 11% more likely to participate than the average visitor. Boomers were the least likely of all cohorts to participate in Arts & Culture activities.
- ✓ Arts and Culture visitors spent an average of \$663 per overnight visitor. Compared to other visitors, they spent slightly more on entertainment and recreation and shopping.
- ✓ Arts and Culture visitors have significantly longer lengths of stay despite a higher proportion of in-state visitors.

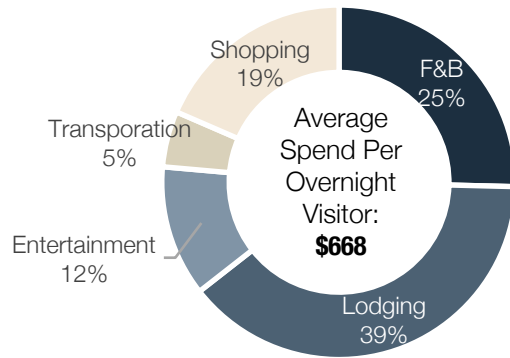
Arts & Culture Index Scores by Generational Cohort



Mean Annual Household Income By Visitor Participation in Various Activities



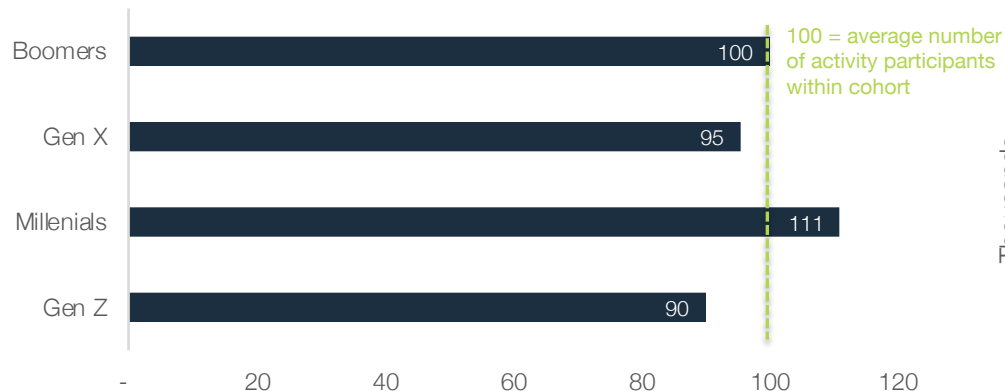
A total of 632 respondents (69% of completed surveys) participated in **Culinary & Dining Experience** activities, including- visits or tours to wineries, distilleries, and breweries - during their stay in Annapolis.



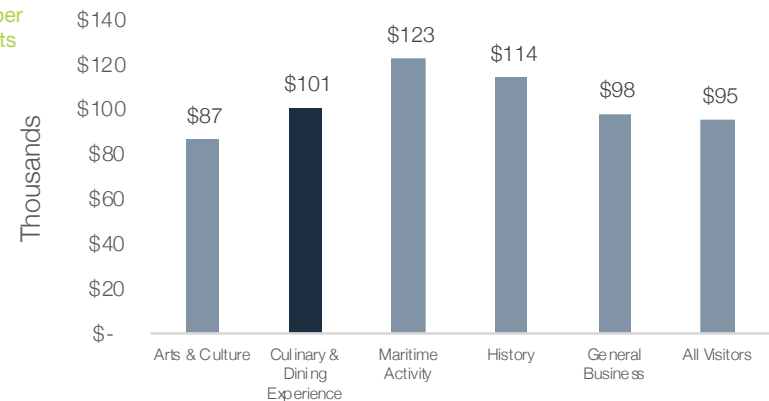
	Culinary & Dining Experience Visitors	All Annapolis Visitors
Average Party Size	3.25	3.18
Average Length of Stay	3.61	3.22
Day Trip Share of Total	28%	31%
Out-of-State Share of Total	59%	55%
First Time Visitors?	27%	28%

- ✓ Millennial visitors are 11% more likely to be visiting Annapolis for culinary & dining experience activities.
- ✓ 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.
- ✓ Culinary and Dining activities respondents spent on average \$668 per overnight visitor. Despite this group's interest in dining experience, they spent an average proportion of their trip budget on food & beverage.

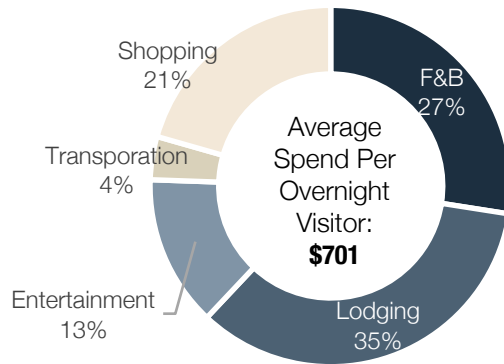
Culinary & Dining Index Scores by Generational Cohort



Mean Annual Household Income By Visitor Participation in Various Activities



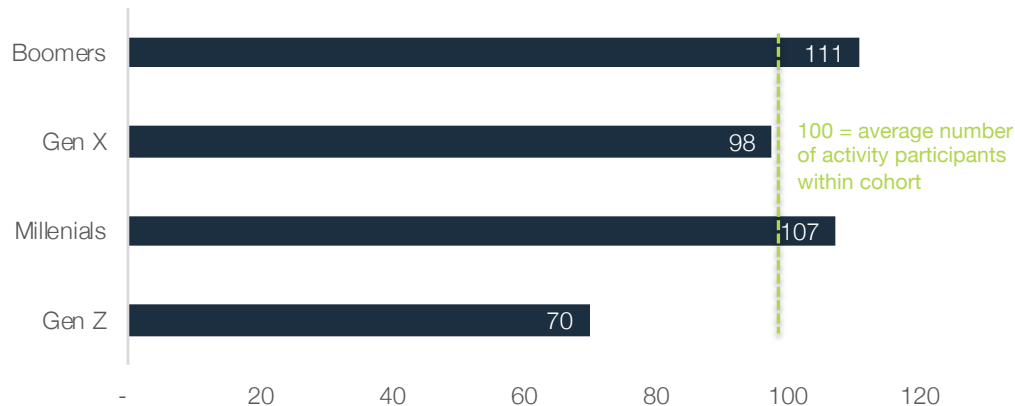
A total of 281 respondents (31% of completed surveys) participated in **Maritime** activities, including-boating, sailing, and water sports - during their stay in Annapolis.



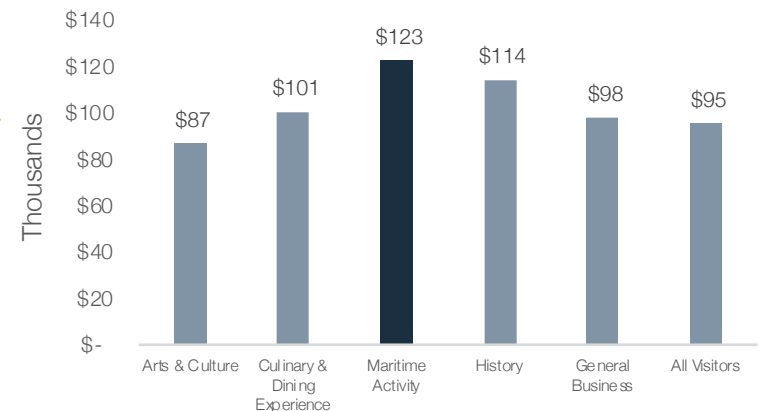
	Maritime Visitors	All Annapolis Visitors
Average Party Size	3.80	3.18
Average Length of Stay	4.12	3.22
Day Trip Share of Total	22%	31%
Out-of-State Share of Total	69%	55%
First Time Visitors?	31%	28%

- ✓ Boomers and Millennials were much more likely to participate in Maritime activities than other visitors.
- ✓ 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.
- ✓ The Maritime activities visitor is the highest spending visitor of all of the leisure activity segments, spending an average of \$701 per overnight trip. Maritime visitors are more likely to spend a higher proportion of their trip budgets on food & beverage and shopping.

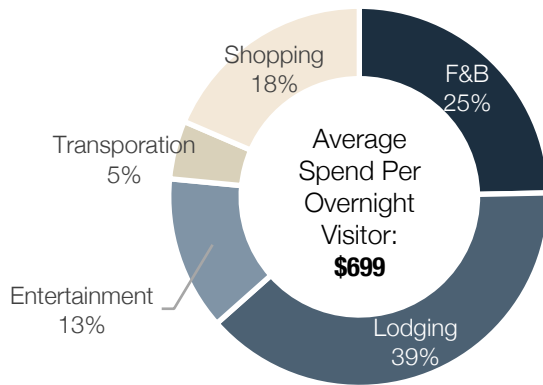
Maritime Activity Index Scores by Generational Cohort



Mean Annual Household Income By Visitor Participation in Various Activities



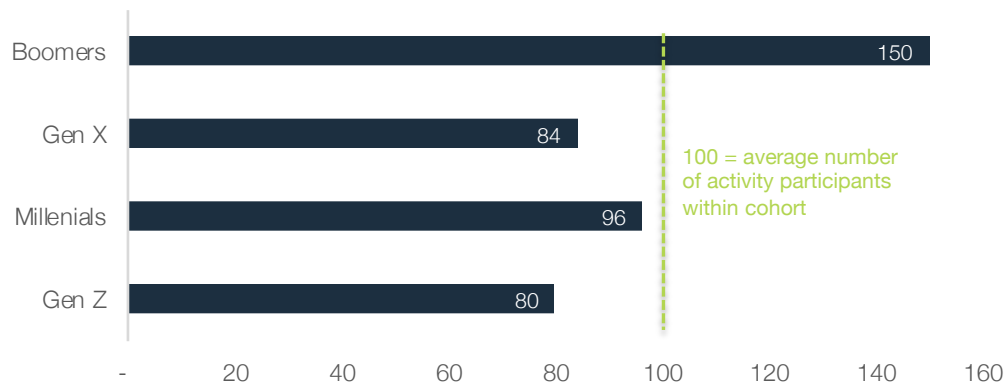
A total of 428 respondents (47% of completed surveys) participated in **History** activities, including-historic sites, parks, and museums - during their stay in Annapolis.



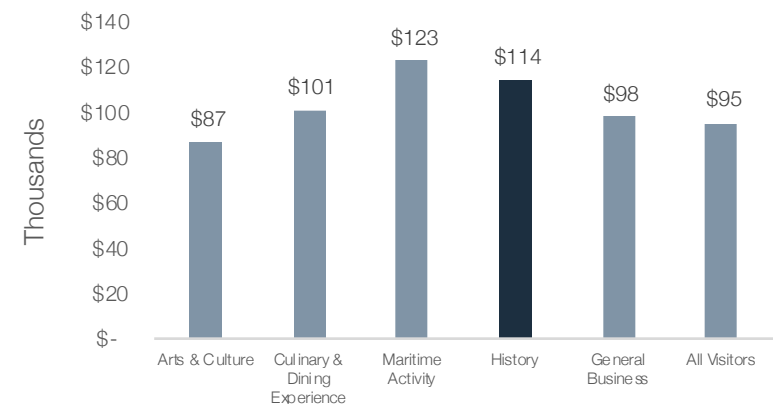
	History Visitors	All Annapolis Visitors
Average Party Size	3.25	3.18
Average Length of Stay	3.78	3.22
Day Trip Share of Total	29%	31%
Out-of-State Share of Total	63%	55%
First Time Visitors?	36%	28%

- ✓ Boomers were 50% more likely to participate in History activities than the average Annapolis visitor.
- ✓ History visitors were more likely to have traveled to Annapolis from out of state and over one-third (36%) were first time visitors.
- ✓ Respondents who participated in History activities spent an average of \$699 per overnight visitor, the second highest spending average of all leisure activity groups. The categorical distribution of History visitors' trip budgets are in line with that of the average Annapolis visitor.

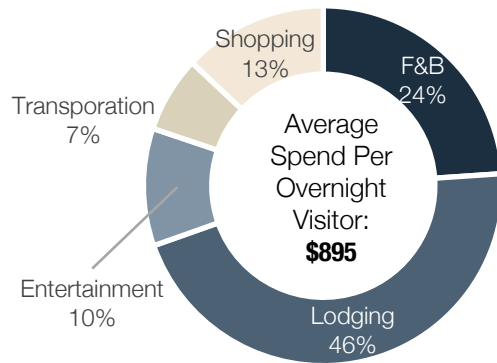
History Activity Index Scores by Generational Cohort



Mean Annual Household Income By Visitor Participation in Various Activities



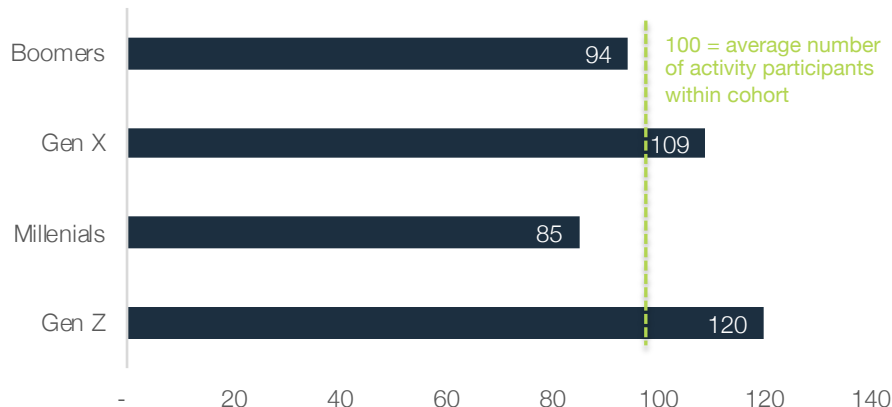
A total of 123 respondents (13% of completed surveys) participated in **General Business** activities, including- meeting, convention, and conference- during their stay in Annapolis.



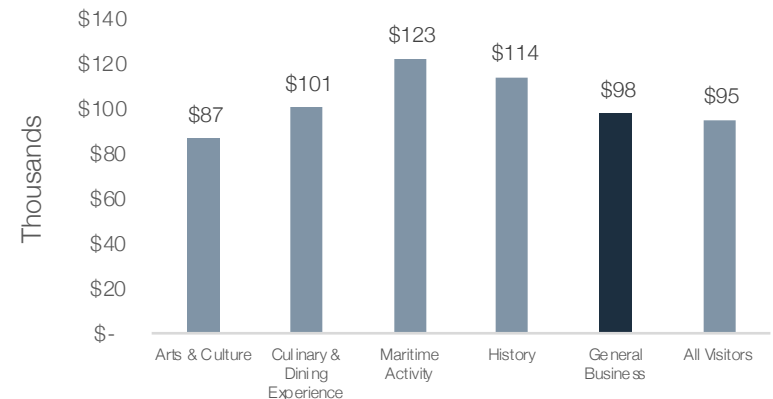
	General Business Visitors	All Annapolis Visitors
Average Party Size	2.70	3.18
Average Length of Stay	3.90	3.22
Day Trip Share of Total	30%	31%
Out-of-State Share of Total	58%	55%
First Time Visitors?	18%	28%

- ✓ Not surprisingly, business visitors had smaller average party sizes than the average visitor and were significantly less likely to be first time visitors to Annapolis.
- ✓ Gen Z visitors were 20% more likely to be traveling for business travel than other cohorts and Gen X visitors were 9% more likely to have been traveling for business purposes than other cohorts.
- ✓ 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.

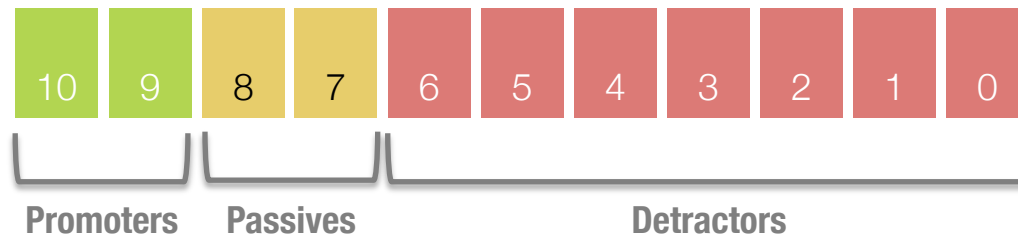
Business Activity by Generational Cohort



Mean Annual Household Income By Visitor Participation in Various Activities



Understanding Visitor Loyalty & the Net Promoter Score (NPS)



Net Promoter Score (NPS) is frequently used as a headline measure of customer loyalty. Years of research have pointed to NPS as being the single-most correlated satisfaction metric with profitability¹. The Net Promoter system divides respondents into three categories: Promoters, Passives or Detractors. The percentage of Detractors is subtracted from the percentage of Promoters to obtain the score.

As it applies to travel destinations, NPS is very important in determining who is likely to visit again, who is likely to promote your destination to others. While it is certainly not the only visitor loyalty or satisfaction measure for a destination to consider, it is an important measure to track and to work on improving over time if a destination is looking to improve offerings to visitors, increase visitor activity and economic impact.

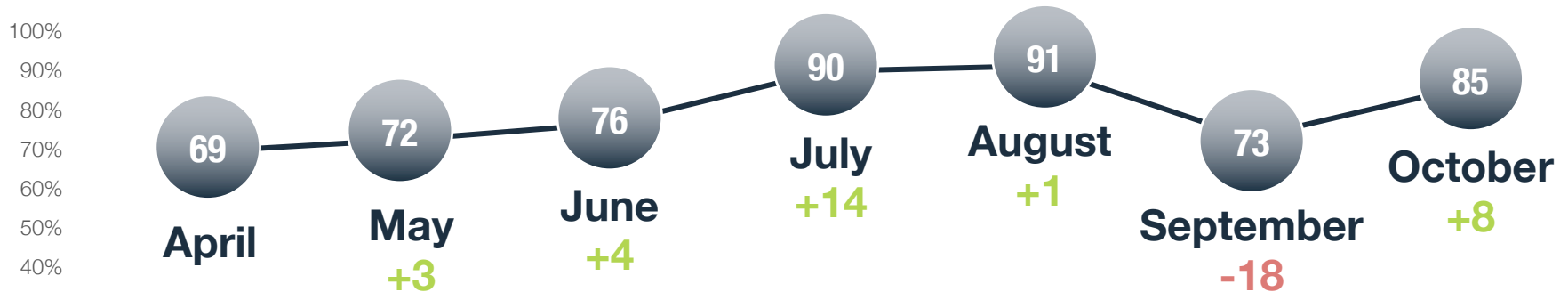
The following pages highlight the NPS scores of various different segments of Annapolis visitors. Here is a summary of some of the key findings:

- **Overall Annapolis visitor NPS is extremely high @ 83**
- **NPS spiked heading into the summer, peaking at 91 in August**
- **When assessing visitor loyalty among generational cohorts, NPS is highest (88) among Gen Xers**
- **NPS is slightly higher for in-state visitors (85) than out-of-state visitors (82)**
- **NPS is slightly higher for overnight visitors (84) than day visitors (79)**
- **There are not significant differences in NPS across income segments, with all rating at 80 or above**

¹Fred Reichheld, The Ultimate Question: Driving Good Profits and True Growth (Harvard Business Press, 2006)

2019 Trends in NPS & Destination Comparisons

Annapolis 2019 Net Promotor Score (NPS) By Month



Annapolis' average NPS over the entire survey field was 83. As highlighted in the timeline above, NPS improved considerably through the spring and summer and **peaked at 91 in August.** NPS declined slightly (-18) in September but rose again (+8) in October as the Fall Boat Shows came to town.

The average NPS score of 83 for **Annapolis is extremely strong.** As a point of reference, we have included a number of reported NPS scores from other travel destinations, which range from a high of 89 in Steamboat Springs, CO to a low of 49% in Nashville, TN.

Destination	NPS Score
Steamboat Springs, CO	89%
Town of Vail, CO	84%
Myrtle Beach area, SC	83%
Breckenridge, CO	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%

NPS by Key Visitor Segments

Annapolis Net Promoter Score (NPS) by **Age**



Annapolis Net Promoter Score (NPS) by **Income**



NPS by Key Visitor Segments

Annapolis Net Promoter Score (NPS) by **In-State Vs. Out of State Visitors**

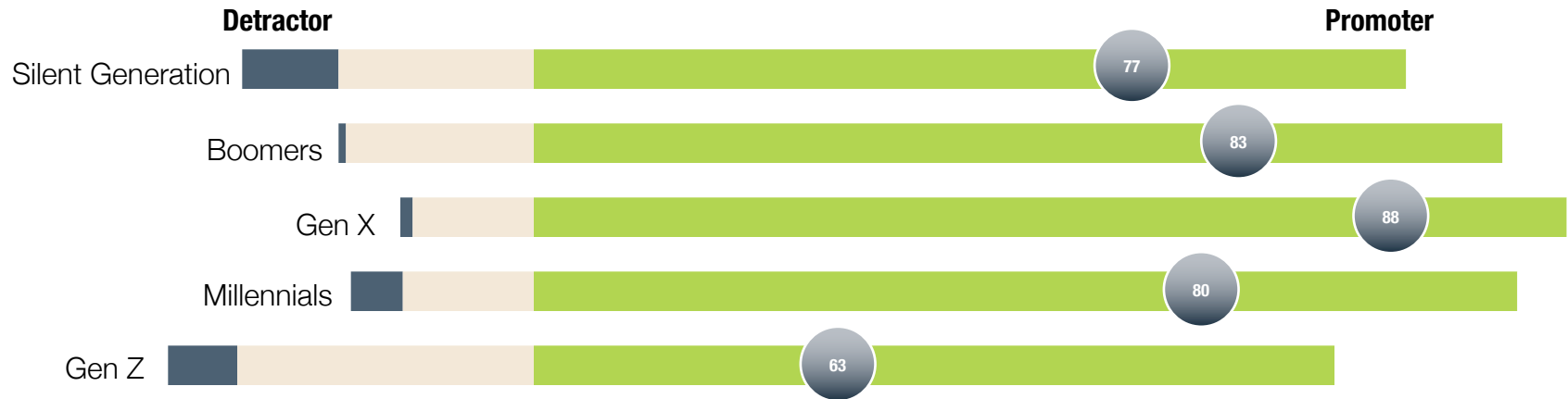


Annapolis Net Promoter Score (NPS) by **Day Vs. Overnight Visitors**



NPS by Key Visitor Segments

Annapolis Net Promoter Score (NPS) by **Generation**

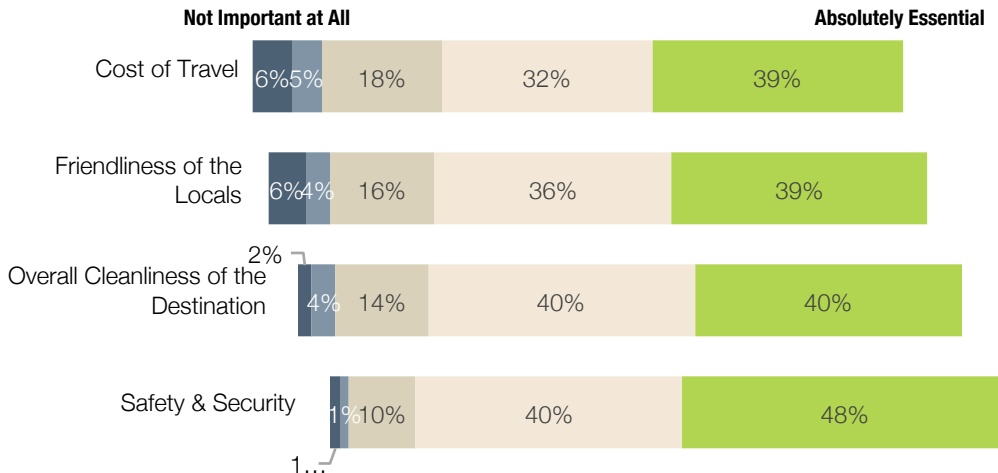


Annapolis Net Promoter Score (NPS) by **Activities**



Destination Attributes: Importance vs. Satisfaction

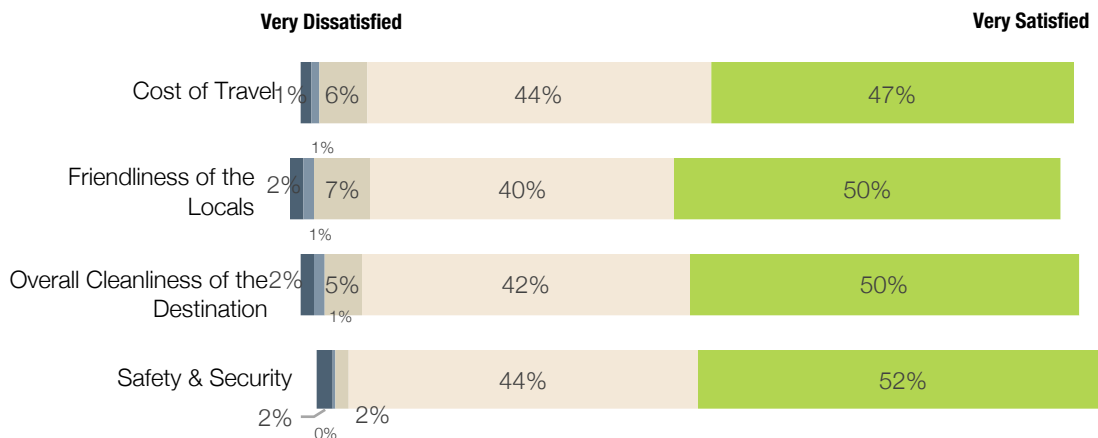
Importance of Various Different Destination Attributes to Visitors



Gap analysis can be used to identify specific areas of weakness within a destination in regards to visitor satisfaction. If a larger proportion of respondents identify an attribute as **important** than the proportion of respondents who are **satisfied** with that attribute, this could signal an area of concern for destination planners.

The table below highlights the top-two box importance of various different destination attributes to visitors alongside the visitor satisfaction of those attributes. Across all metrics, satisfaction ratings out-ranked importance ratings, signaling healthy visitor satisfaction across all measured metrics.

Visitor Satisfaction with Various Aspects of Annapolis as a Destination



	Importance (Top two box response)	Satisfaction (Top two box response)	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%

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Appendix I: Survey Sample Sizes

Gender	Number of Responses
Male	329
Female	373
Answering as a couple	119
Prefer not to answer	118
Total	939

Highest Level of Education	Number of Responses
Graduated High School/less than HS	34
Some College or Trade/ Tech School	64
Associate's degree	59
Bachelor's degree	410
Advanced degree (Masters, PhD , MD)	172
Prefer not to answer	195
Total	934

Primary Accommodations	Number of Responses
Hotel or Motel	311
Friends or Relatives	171
Vacation Rental (Airbnb, HomeAway, VRBO)	61
Bed & Breakfast	14
Aboard a Boat	41
Other	9
Total	607

Age	Number of Responses
24 or less	84
25 – 39	229
40 - 44	198
45-54	155
55 - 64	107
65 +	61
Prefer not to answer	109
Total	943

Household Income	Number of Responses
\$50K or Less	131
\$50K - \$74.9K	146
\$75K - \$99.9K	84
\$100K - \$124.9K	62
\$125K - \$149.9K	46
\$150K - \$199.9K	40
\$200K+	42
Prefer not to answer	374
Total	925

Event Attended	Number of Responses
Annapolis Boat Shows	255
Navy Commissioning Week	59
Wedding or Family Event	77
Navy Football Game	82
Total	473

Attending Major Event?	Number of Responses
Yes	583
No	375
Total	958

Primary Trip Purpose	Number of Responses
Leisure Only (including visiting friends or relatives)	548
Business Only	94
Both business and leisure	367
I live in Anne Arundel County	180
Total	1,189

Reason for your business trip?	Number of Responses
Group Meeting, Event or Conference	61
Other Business	397
Total	458

Number of Times Visited Annapolis	Number of Responses
First Time	283
2 to 3	357
4 to 9	245
10 to 19	63
20+	53
Total	607

Appendix II: NPS Scores Among Various Segments

Question	Response	Detractors	Passives	Promoters	NPS
Survey Location	Visitor Center	2%	23%	75%	73%
	City Dock	2%	12%	86%	84%
	Other location in town	3%	9%	88%	85%
Primary Accommodations	Hotel or Motel	2%	13%	85%	83%
	Staying with friends or relatives	2%	9%	88%	86%
	Vacation rental (Airbnb, homeaway, VRBO, etc)	3%	11%	85%	82%
	Bed & Breakfast	8%	15%	77%	69%
	Staying aboard a boat	0	0	100%	100%
	Other (please specify)	11%	33%	56%	45%
Gender	Male	2%	16%	82%	80%
	Female	2%	11%	87%	85%
	Prefer not to answer	1%	6%	93%	92%
	Answering as a couple	3%	15%	83%	80%
Weekday vs Weekend	Weekday	2%	13%	85%	83%
	Weekend	2%	12%	86%	84%
Day vs Overnight	Day	3%	15%	82%	79%
	Overnight	2%	11%	86%	84%
In-State vs Out of State	In-State	3%	10%	88%	85%
	Out-of -State	3%	14%	84%	82%
Major Events Attended	Annapolis Boat Shows	1%	4%	95%	94%
	Naval Academy Commissioning Week	2%	10%	88%	86%
	Wedding or family gathering	3%	11%	87%	84%
	Navy Football game	1%	12%	86%	85%
	Other (please specify)	3%	14%	82%	79%
Visitor Spending Quartiles	Very Low	7%	28%	64%	57%
	Low	5%	18%	77%	72%
	Moderate	5%	18%	77%	72%
	High	2%	23%	75%	73%

Appendix II: NPS Scores Among Various Segments

Question	Response	Detractors	Passives	Promoters	NPS
Age	17 or younger	17%	17%	67%	50%
	18 to 24	4%	27%	69%	65%
	25 to 39	4%	11%	85%	81%
	40 to 44	1%	9%	90%	89%
	45 to 54	1%	12%	87%	86%
	55 to 64	0	15%	85%	85%
	65 to 74	2%	19%	79%	77%
	75 or older	8%	17%	75%	67%
	Prefer not to answer	0	8%	92%	92%
Generation	Gen Z	6%	25%	69%	63%
	Millennials	4%	11%	85%	80%
	Gen X	1%	10%	89%	88%
	Boomers	1%	16%	83%	83%
	Silent Generation	8%	17%	75%	67%
Household Income	Less than \$50,000	4%	11%	86%	82%
	\$50,000 to \$74,999	3%	12%	86%	83%
	\$75,000 to \$99,999	1%	12%	87%	86%
	\$100,000 to \$124,999	2%	20%	79%	77%
	\$125,000 to \$149,999	2%	18%	80%	78%
	\$150,000 to \$199,999	0	17%	83%	83%
	\$200,000+	2%	12%	86%	84%
	Prefer not to answer	2%	11%	86%	84%

Silent Generation: Silent Generation members were born between 1925 and 1943. They are currently between 76 and 94 years old (23 million people in the US)

Baby Boomers: Baby boomers were born between 1944 and 1964. They're currently between 55-75 years old (76 million people in U.S.)

Gen X: Gen X was born between 1965 - 1979 and are currently between 40-54 years old (82 million people in U.S.)

Millennials (Gen Y): Millennials were born between 1980 and 1994. They are currently between 25-39 years old.

Gen Y.1 = 25-29 years old (31 million people in U.S.)

Gen Y.2 = 29-39 (42 million people in U.S.)

Gen Z: Gen Z is the newest generation to be named and were born between 1995 and 2015. They are currently between 4-24 years old (nearly 74 million people in U.S.)



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