

Executive Summary

Understanding Hispanic Leisure Travelers: Opportunities for Maryland Tourism

Introduction

The Maryland Office of Tourism and Development (OTD) initiated this research to gain a more complete and culturally attuned understanding of Hispanic leisure travelers. Although Hispanic visitors represented 9% of Maryland's domestic travel audience in 2022, OTD recognized the importance of moving beyond generalizations and national-level data to understand the specific motivations, behaviors, and perceptions of Hispanic travelers in key feeder markets. The goal: to build more inclusive, effective strategies that speak directly to the unique needs and interests of this growing segment.

Methodology

A mixed-methods approach was employed to capture both broad trends and in-depth perspectives:

- **Quantitative Survey (Nov 2024 – Jan 2025):**
 - Conducted with 1,753 Hispanic leisure travelers across Maryland's top feeder markets: New York, New Jersey, Pennsylvania, Washington D.C., and Virginia.
 - Respondents were ages 18-72, had household incomes of \$50,000+, had traveled for leisure in the past two years, and expressed intent to take a future trip with overnight accommodations.
 - The survey was offered in both English and Spanish, and results were weighted to reflect national Hispanic leisure traveler demographics as outlined in MMGY's *Vistas Latinas* report (2021).
- **Qualitative Focus Groups (Feb 2025):**
 - Three virtual focus groups (N=23) were conducted with Hispanic leisure travelers from New York, New Jersey, Pennsylvania, and Virginia.
 - Participants reflected a mix of countries of origin, language fluency, travel experience, and family composition.
 - Groups were conducted in both English and Spanish and moderated by an expert in Hispanic culture.

In addition to primary research, insights were supported by:

- *Vistas Latinas*, MMGY Global (2021)
- *Travel Performance MonitorSM*, DK Shifflet (2022)
- *Maryland Predictive Analytics Study*, Gray Research Solutions (2021)

Cultural Climate

This research was conducted during a time of heightened sensitivity around immigration, identity, and inclusion—factors that strongly influence travel decisions among Hispanic communities. For some families, especially mixed-status households, concerns about safety,

documentation requirements, and unwelcoming environments can create hesitancy around certain destinations.

Multigenerational dynamics and cultural preferences also shape travel behaviors. For example, even highly acculturated travelers who are fluent in English often prioritize destinations with Spanish-speaking staff when traveling with older relatives. These nuanced needs highlight the importance of inclusive experiences—not just in messaging, but on the ground at the destination level.

Key Findings

1. Traveler Profile

The typical out-of-state Hispanic visitor to Maryland is highly acculturated:

- Most are U.S.-born or have lived in the country for more than 10 years.
- They tend to be younger (Millennial), speak both English and Spanish fluently, and fall into middle-income households (\$50K–\$100K).

2. Trip Planning Behavior & Travel Preferences

Hispanic leisure travelers emphasize family time and affordability as their top priorities when planning trips.

- 65% took a family vacation in the past two years; 53% traveled to visit friends or relatives.
- Travel serves as a mental reset or escape from stress—for Millennials, that often means nature and outdoor recreation; for Gen Z, a walkable city with energy and culture.
- Safety is also top factor in destination choice, particularly among women and LGBTQ+ travelers.
- Feeling welcome as a Hispanic traveler often includes seeing other Hispanic people, having access to authentic Hispanic culture and food, and feeling part of a vibrant community.

3. Trip Planning & Media Consumption

Travelers primarily rely on digital platforms to plan and get inspiration.

- Most-used planning tools include trip review sites (59%), word-of-mouth (45%), social media posts (44%), and travel deal sites (43%).
- Most used social platforms include Instagram (71%), Facebook (62%), and YouTube (60%)—with video noted as a highly memorable and persuasive medium.
- Most travelers preferred English-language planning resources, citing poor translations (e.g., Google Translate) as a barrier. However, Spanish-speaking staff were appreciated when traveling with older relatives.

4. Perceptions of Maryland

Maryland's brand associations are generally positive but somewhat narrow.

- 90% agreed Maryland has attractions and activities they find appealing.
- 88% agreed Maryland is a safe state.
- 87% agreed the state is welcoming to the Hispanic community.
- Top unaided perceptions include Baltimore, crabs, the Chesapeake Bay, seafood, and beaches.
- Aided awareness aligns with those themes: 35% associate Maryland with seafood/crabs; about 25% with history, the Chesapeake Bay, and beaches.
- Maryland is perceived by this group as having a quiet, slow-paced, relaxed atmosphere—a strong contrast to the urban hustle of origin markets like New York or Philadelphia.
- Past travelers were most familiar with the Capital Region, Central Maryland, and the Lower Eastern Shore, with many unaware of Western Maryland or its outdoor appeal.
- Many travelers only hear about Baltimore and Ocean City, indicating a lack of awareness of the state's broader regional offerings.

5. Past Visitation to Maryland

Maryland has already seen strong engagement from Hispanic travelers.

- 54% had visited Maryland in the past 3 years, with Millennials making up the largest share (42%). 33% had visited previously but not since 2021; 13% had never visited.
- Most recent visits were for family vacations (28%) or to visit friends and family (29%).
- Popular activities included:
 - Shopping (41%)
 - Beaches (40%)
 - Eating local seafood (37%)
- Family vacationers were more likely to visit the beach (51%), while those visiting friends and family more often went shopping (51%).
- Trip parties typically included spouses (66%) and children (53%).
- 83% stayed overnight, averaging 3.2 nights; 62% stayed in hotels.
- The overall Net Promoter Score (NPS) was a strong 61.6, driven by recent visitors, Millennials, and travelers from NY and VA. In contrast, lapsed visitors and those from PA scored Maryland lower.

6. Segment Profiles of Recent Visitors

Among Hispanic leisure travelers who have recently visited Maryland, three distinct visitor segments emerged based on travel purpose and behavior:

Family Vacationers (61%)

This is the largest and most enthusiastic segment, with the strongest Net Promoter Score (**NPS = 80.3**).

- Primarily composed of Millennials (53%) and Gen X (25%).
- Tend to have higher household incomes (23% earn \$150K+).
- More likely to have visited Western MD (31%), Southern MD (27%), and the Upper Eastern Shore (19%).
- Average stay: 3.5 nights, with 70% staying in hotels and 14% in resorts.
- Averaged 4.7 activities per trip, including museums, hiking, biking, and live music.
- Expressed more positive sentiment toward Maryland than other segments.

Visiting Friends and Family (28%)

This group represents travelers who came to reconnect with loved ones. While generally satisfied, their Net Promoter Score is more moderate (NPS = 56.6).

- Includes Millennials (36%) and Gen X (22%).
- Tend to have lower household incomes, with 58% earning \$50–\$100K.
- Most often visited the Capital Region (34%) and Central MD (32%).
- Average stay: 2.7 nights, with 4.1 activities per trip.
- Activities often included enjoying seafood, exploring the culinary scene, and taking scenic drives.
- Expressed more neutral sentiment about Maryland.

Family Event Participants (11%)

This smaller segment traveled for occasions like reunions, weddings, or other family gatherings. They had the lowest satisfaction and Net Promoter Score (NPS = 34.2), though still positive.

- Skews both older and younger, with 34% Boomers and 25% Gen Z.
- Most fall into the \$50–\$100K income range (62%).
- Many took daytrips (27%), though the average overnight stay was 2.9 nights.
- Averaged 3.7 activities, often focused on experiencing local culture and sightseeing.

7. Non-Visitor Perspectives

For those who have not visited Maryland, barriers to visitation were mostly related to lack of awareness and competition from better-known destinations.

- Non-visitors reported lower familiarity with Maryland's leisure offerings and regional distinctions.
- The most appealing experiences to this group include enjoying uniquely Maryland culinary experiences and exploring the Chesapeake Bay.
- Key motivators for potential visitation include:
 - Abundant coastline and beaches
 - Diverse culinary scene
 - Walkable waterfront towns

8. Future Travel Potential

The outlook for future visitation is strong.

- 85% would consider a future trip to Maryland.
- Non-visitors or lapsed visitors were most interested in the Capital Region (47%).
- Travelers were most interested in beach trips, sightseeing, and shopping.
- 71% would choose a hotel for future accommodation.
- Preferred seasons to travel: Spring (58%) and Summer (55%).
- 42% of Millennials expressed interest in Western Maryland, especially for winter travel, suggesting an opportunity to promote outdoor activities like skiing, hiking, or scenic winter escapes.

9. Motivators for Maryland Consideration

There are specific assets that could encourage greater interest in Maryland:

- 43% of all respondents indicated that learning more about Maryland's abundant coastline and beaches would motivate them to plan a trip—especially Boomers (58%) and Gen X (48%).
- Other motivators vary by generation:
 - Boomers: cultural history & heritage (45%), walkable waterfront downtowns (45%), local seafood (43%)
 - Gen X: museums/historic sites (41%) and diverse culinary scene (40%)
 - Millennials: access to professional sports (24%)
 - Gen Z: theme parks and family-friendly activities (32%)

- Some nuances also appeared by geography:
 - NY: higher interest across categories, especially culinary (45%), history/heritage (43%), and museums (39%)
 - DC: access to professional sports (23%)
 - VA: fishing and hunting opportunities (29%)

10. Appeal of Uniquely Maryland Experiences

- Maryland's culinary experiences were considered the most appealing statewide asset, followed by exploring the Chesapeake Bay.
- More than 80% of respondents also found the state's Scenic Byways and Underground Railroad history appealing.
- Millennials showed stronger interest across all assets compared to other generations.
- Regional nuances emerged:
 - Travelers from Virginia showed elevated interest in Underground Railroad history
 - Travelers from Pennsylvania expressed more interest in exploring the Chesapeake Bay and unique hunting experiences

Strategic Implications

The findings reinforce that Hispanic travelers are an important and receptive audience for Maryland, particularly Millennials and Gen X travelers traveling with family. To maximize engagement:

- Broaden awareness beyond Ocean City—educate Hispanic travelers about Maryland's coastline, beach alternatives, and lesser-known destinations.
- Leverage Maryland's appeal to families and showcase cultural heritage, food, and outdoor adventure, especially in Western Maryland and Capital Region.
- Use video content across Instagram, YouTube, and Facebook to connect with this highly digital audience.
- Consider Spanish-speaking influencers and vloggers to bring Maryland to life authentically and memorably.
- Incorporate Spanish-language elements only when done well—authenticity matters more than simply offering translation.
- Highlight cultural festivals and events that celebrate Latino heritage, and ensure experiences are multigenerational-friendly and inclusive.