MAY 8, 2019

RICHMOND REGION TOURISM

TOURISM
MASTER PLAN

VISIT SURVEY
REPORT

RICHMOND REGION TOURISM
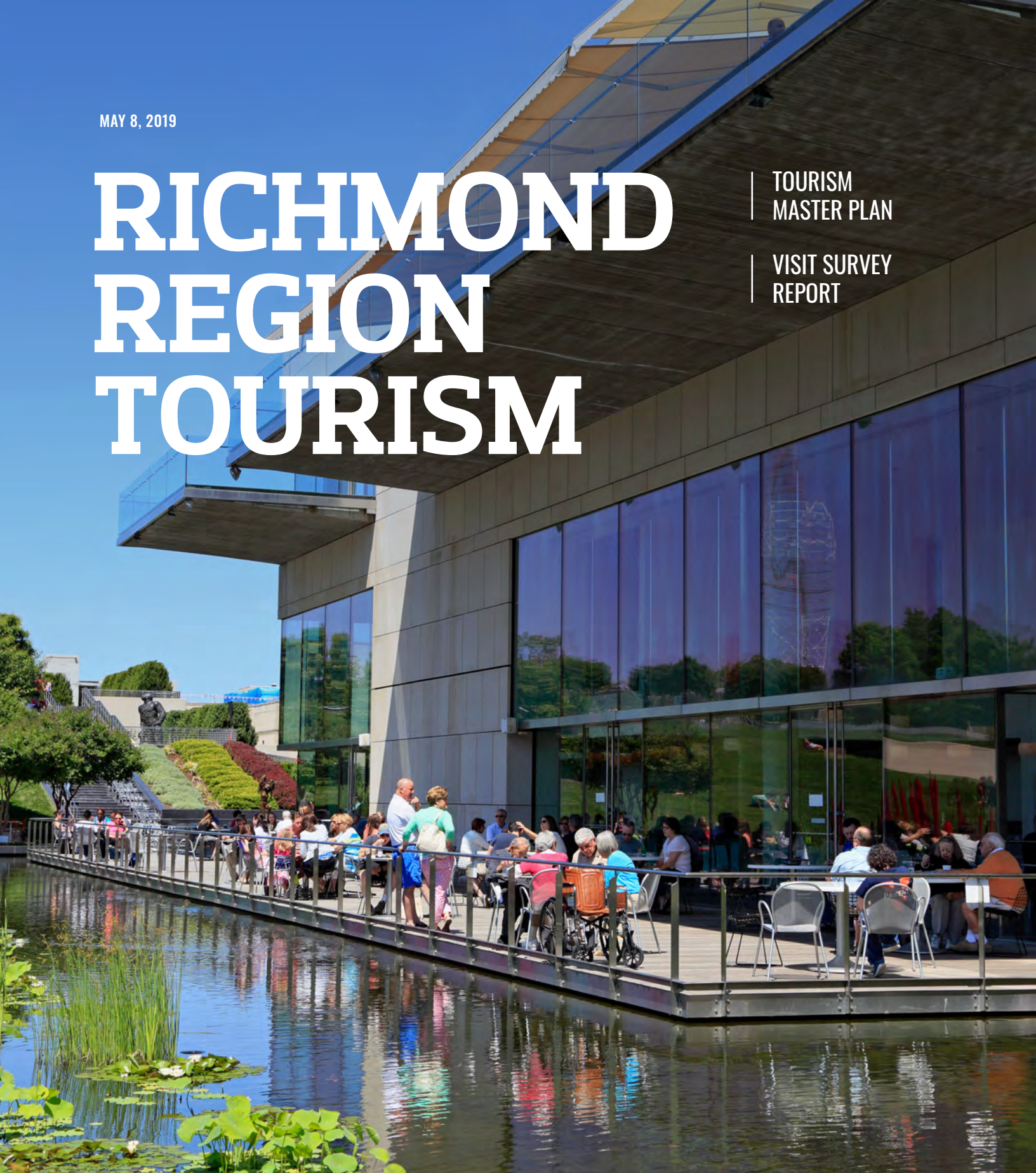
OVERVIEW

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Understanding what visitors really want is crucial to any successful destination. But imagine if we could go a stage further; if as an industry we could discover what genuinely shapes travel experiences, or measure what travelers value most and in turn how their expectations could and should be better met.

During this foundational step of the Tourism Master Planning process, the goal is to identify and define the types of travelers who are attracted to the Richmond region, what they value and how the region is delivering on their expectations. While desk research is valuable to paint a picture of a destination's broader market opportunities, primary research allows us to ask specific questions:

- Which aspects of the Richmond "experience" are important to you in deciding to visit the area?
- Which aspects of your visit were excellent or outstanding?
- Which aspects of your visit weren't so outstanding?
- How did your perception of the region change following your visit?

The answers to these questions help guide the planning, product development, programming, policy and promotion of the Richmond Region's tourism industry.

METHODOLOGY

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In consultation with Richmond Region Tourism staff, Resonance developed an online survey to identify and gauge previous visitors' travel habits, preferences, and perceptions of the Richmond region. The survey was extensively promoted via social media platforms and email to the databases of a variety of public and private organizations as introduced by Richmond Region Tourism staff. The survey questions were designed to:

- Assess the demographic and psychographic characteristics of previous visitors to the Richmond region
- Conduct a segmentation analysis of respondents to better understand the Richmond region visitor and how they differ from U.S. travelers in general
- Identify the motivating factors that drove previous visitors to select the Richmond region as their destination of choice
- Assess the quality and satisfaction with current services, accommodations and amenities throughout the Richmond region
- Assess previous visitor perceptions of the Richmond region both before and after their visit

More than 1,000 previous visitors to the Richmond region participated in the survey.

SUMMARY

Visitors to the Richmond region are coming to the region to experience its history and landmarks, but also its restaurants, museums, nature and parks and culture and diversity. Younger visitors appear to be more motivated by the destination's culinary, outdoor and nightlife experiences, while older visitors are more motivated by the region's history and role as the state capital. Visitors to the Richmond region have a more positive perception of the destination after visiting the region than they did prior to visiting, an important outcome as perceived quality of place becomes increasingly important for tourism and economic development.

KEY FINDINGS

- Previous visitors to the Richmond region are more likely to be Family-Oriented Frugals and Active Adventurers
- 35% of previous visitors traveled as a married couple, while roughly 20% traveled alone or as a family
- The top five words used to describe the Richmond region were 'history', 'historic', 'food', 'fun' and 'culture'
- Roughly half of previous visitors said they had an "excellent" or "very good" perception of the Richmond region prior to their visit. This number grew to over 80% for previous visitors following their visit
- Nearly nine in ten previous visitors visited the city of Richmond and more than half visited Henrico County
- Historic sites and landmarks, restaurants and museums were the most important aspects of the Richmond experience in motivating previous visitors to select Richmond as a destination
- Younger travelers are more likely to find restaurants, the arts, outdoor activities, breweries/distilleries/wineries and nightlife important
- Older visitors were more likely to cite historic sites and landmarks and being the state capital as important
- The top five words used to describe the positive aspects of their previous visit were 'restaurant', 'museum', 'historic', 'food' and 'history'

- The top five words used to describe the negative aspects of their previous visit were 'none', 'traffic', 'nothing', 'park' and 'area'
- The majority of previous visitors view Richmond as a friendly destination and roughly half feel the destination is 'clean', 'safe and secure' and 'diverse and welcoming'. Only 23% of previous visitors rated Richmond positively for parking and that number fell to one in ten for transit services

DEMOGRAPHICS

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GEOGRAPHY

The majority of previous visitors are located in the Mid-Atlantic Region and other drive markets. However, we do find clusters of previous visitors in other areas of the country, particularly in areas with direct air access to the region.
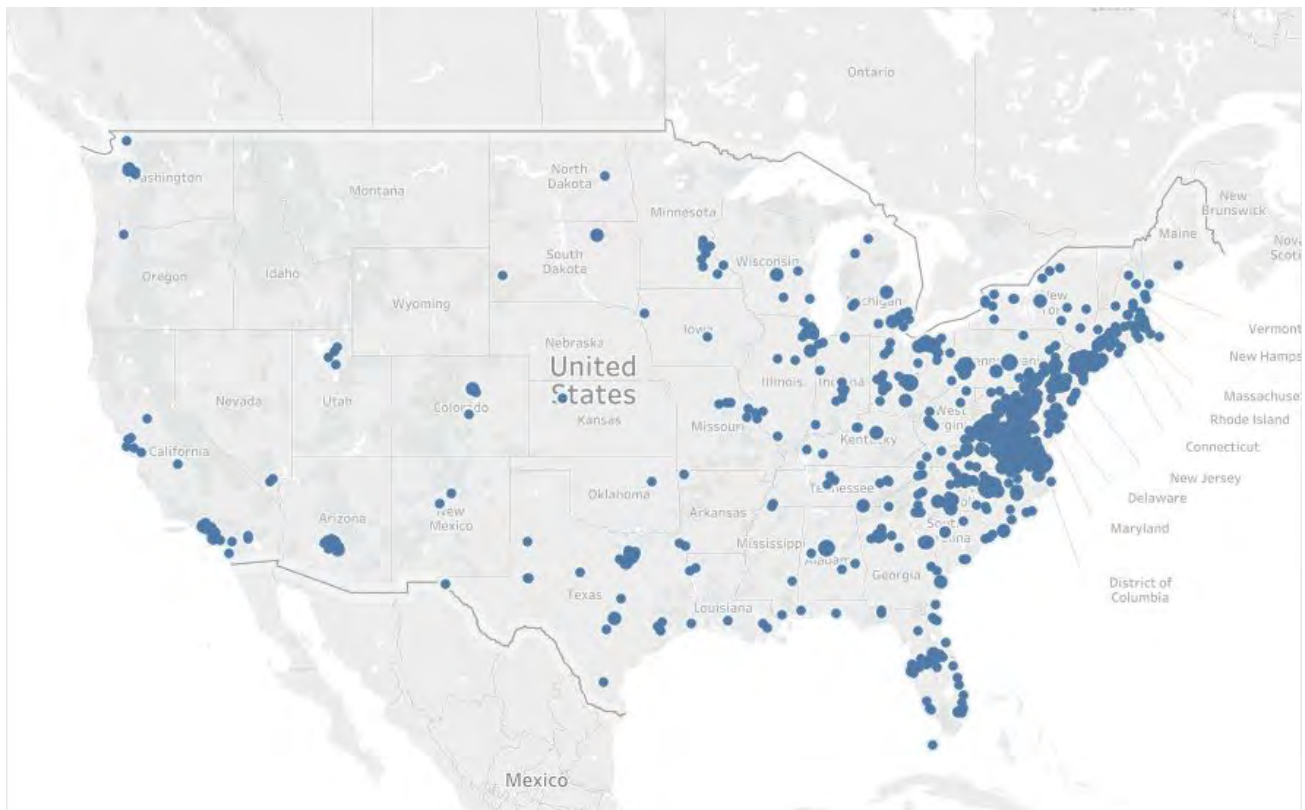
AGE

The age of respondents tended to skew older with six in ten respondents being 55 years or older, while nearly two in ten fell into the category of 45-54. Roughly one in ten visitors fell into the age categories of 25-34 or 35-44.
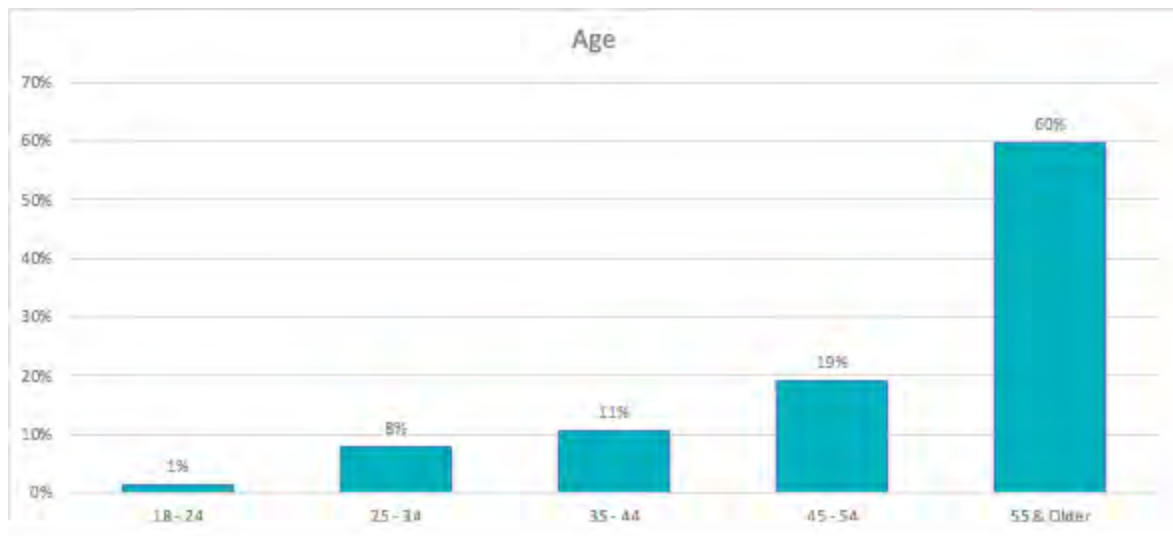
Q. What is your age?

ETHNICITY

The vast majority of respondents, more than 80%, were white or caucasion. African American respondents made up the second largest group of respondents at 7%.
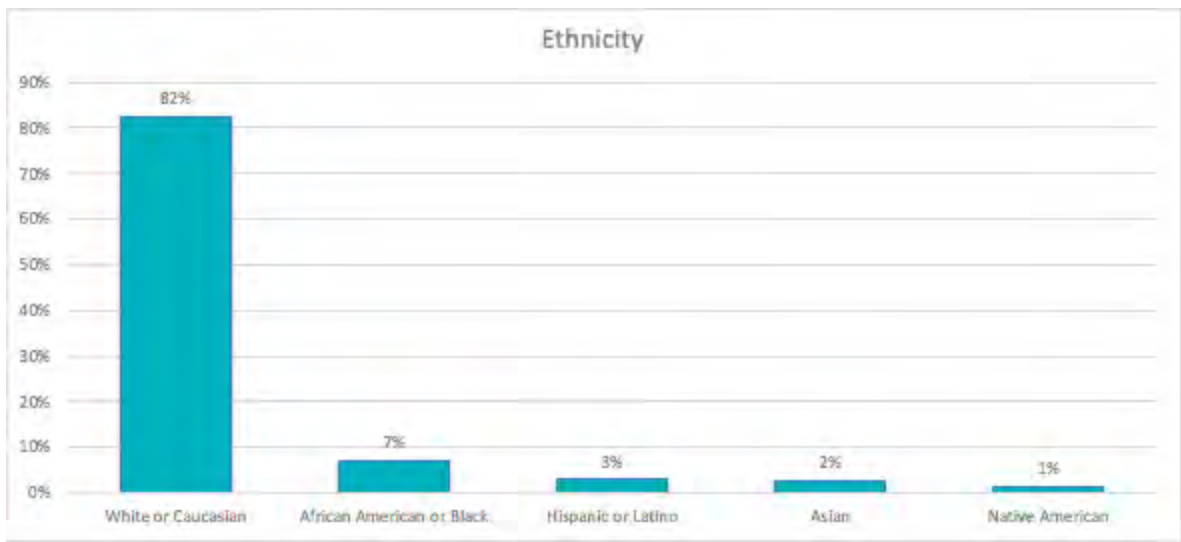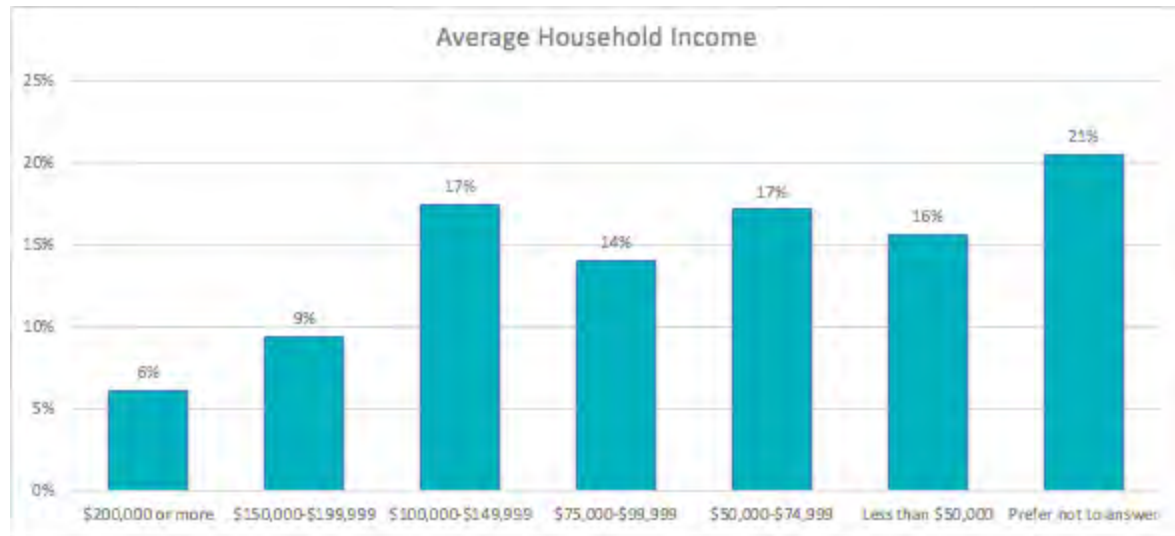

Q. To make sure we are representing the views of a broad mix of people, please indicate the ethnic group to which you belong. (Check all that apply)

ANNUAL HOUSEHOLD INCOME

Respondents from various income groups were well represented with average incomes between $100,000-$149,999 and $50,000-$74,999 being the largest groups of respondents.

Average Household Income

Q. Which of these ranges includes your total annual household income, before taxes for 2018?

MARKET SEGMENTATION

OVERVIEW

It's difficult to market to age groups on a generational basis because they're so big. More effective, then, is to identify psychographic segments, types of travelers who—regardless of age or gender—share similar travel, interests and spending patterns. By approaching marketing from a psychological profile, destinations can focus on developing products and types of marketing that appeal to these segments. Resonance surveys more than 4,000 active U.S. and Canadian travelers each year and has created a proprietary segmentation modeling tool that allows us to profile your database and conduct this segmentation analysis. The segmentation analysis used is both a behavioral and attitudinal segmentation. Three main inputs are used in our segmentation modeling:

1. Most important factors taken into account when deciding on a vacation destination;
2. Activities enjoyed while on vacation; and
3. General attitudes towards vacations

The resulting segmentation solution identifies five key segments of varying sizes with distinct behaviors and attitudes resulting in different demographic profiles and trip characteristics. Key segments of U.S. and Canadian travelers in our modeling are:

Infrequent Convenience Travelers: They take shorter, less frequent trips annually that are close to home. English spoken is important when choosing a vacation destination. These travelers are also less likely to participate in all vacation activities, except dining & fun attractions.

Active Adventurers: Active Adventurers are more likely than their counterparts to visit a beach resort, and they're more likely to travel greater distances to get to their destinations. But where this segment really stands out is in the activities they seek at their destinations. Slightly more male and slightly younger (46 years old, on average), with fewer families, they have a great interest in engaging with nature and participating in outdoor sports. This

group doesn't see a vacation as a time to slow down or be indulgent. They want to explore new things and keep moving; health and fitness are important. A whopping 91% participate in outdoor sports while at their destination versus 60% of average U.S. travelers.

Sophisticated Explorers: The driving force for Sophisticated Explorers is, well, exploring—specifically, exploring cultures and traditions at a destination. They prioritize sightseeing, visiting cultural attractions and learning new things more than other groups. This is, by a wide margin, their purpose for traveling, and statements that other travelers prioritize (for example, access to technology) are significantly less important to this segment. Compared to all groups, they conduct significantly more research prior to going on vacation. Slightly more female and slightly older, Sophisticated Explorers take fewer vacations per year, but do so to further-flung destinations—often traveling more than 1,000 miles—and often stay longer than eight days. Frequent travelers to Europe, the Caribbean, Mexico and to big cities, they're high spenders who are willing to pay for experiences.

Family-Oriented Frugals: Take fewer and shorter trips that are close to home. Greater interest in family vacations with kids and multi-generational vacations compared to other segments. Place greater importance on safety, cost, and favorable climate.

All-in Enthusiasts: Interested in taking most types of vacations. Everything is important to them when deciding on a vacation destination. They are more likely to participate in most types of activities and go on vacations for all the different reasons. From an age perspective, they skew younger than the other segments.

The following chart represents the approximate share each of these segments accounts for among all U.S. travelers.
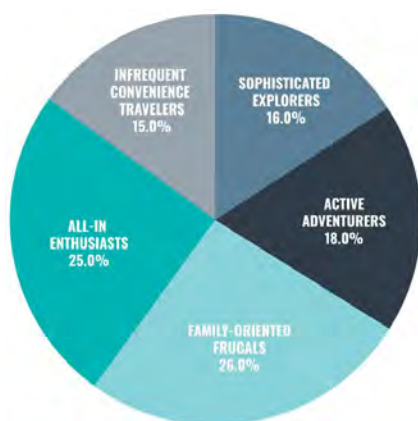
To better understand who the current the Richmond region customer is, how they compare to U.S. travelers in general and what types of travelers might be attracted to the destination in the future, we utilized the same methodology to analyze previous visitors to the Richmond region.
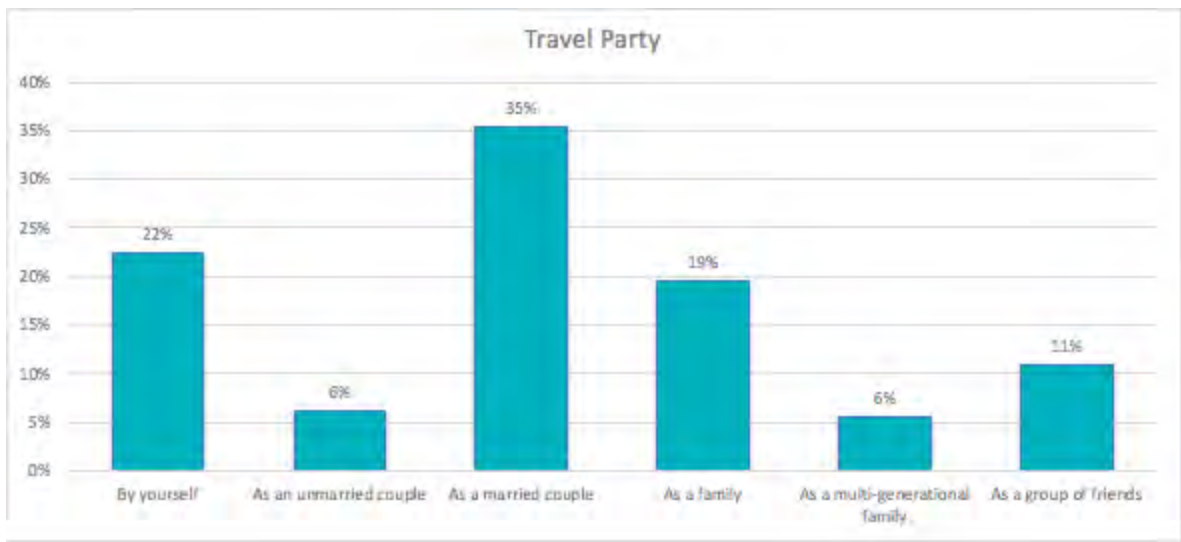
Roughly half of previous visitors to the Richmond region were Family-Oriented Frugals. Two in ten were Active Adventurers and one in six were All-In Enthusiasts. Roughly one in ten were Infrequent Convenience Travelers or Sophisticated Explorers.
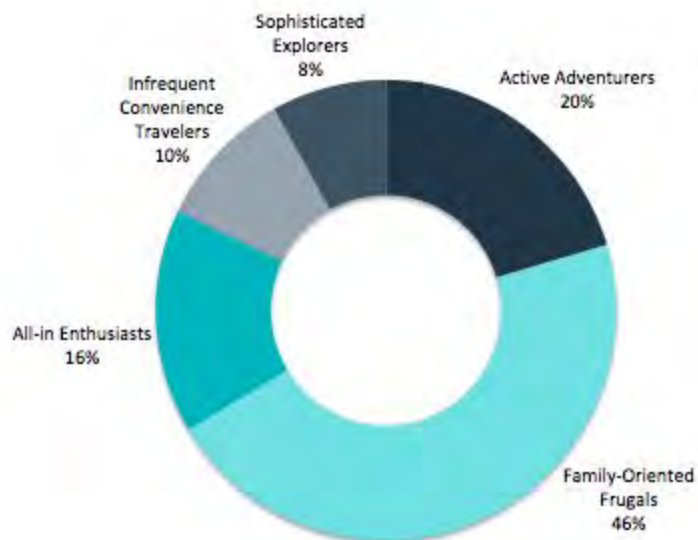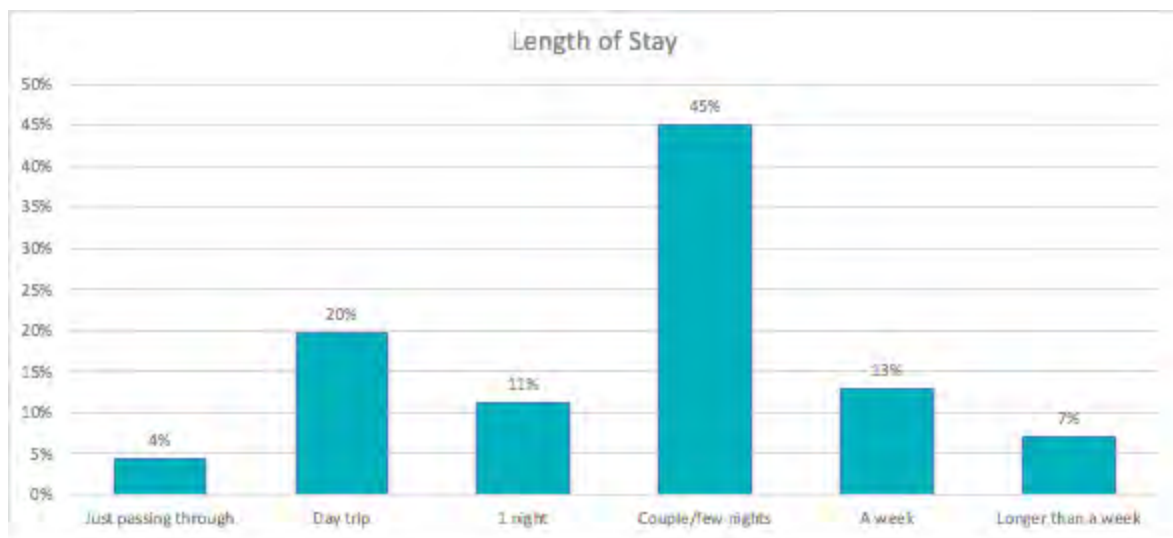
TRAVEL HABITS

TRAVEL PARTY

More than one-third of previous visitors traveled to the Richmond region as a married couple, while roughly two in ten traveled alone or as a family. Solo travel is on the rise, particularly amongst female travelers. Searches for "solo female travel" grew by 52% between 2016 and 2017, and 38% of those who have traveled solo will do so again according to research from Booking.com. Higher income visitors (over $200k) were more likely to travel as a married couple (50% vs 35%).

Q. Did you travel ...

LENGTH OF STAY

Roughly half of previous visitors indicated that they spent a couple/few nights in the Richmond region on their most recent visitors. Two in ten previous visitors indicated their most recent visit was a day trip, while a similar percentage indicated they spent a week or more in the destination. Respondents who indicated the purpose of their trip was visiting friends and family were more likely to spend a week or more in the destination.

Length of Stay

Category	Percentage
Just passing through	4%
Day trip	20%
1 night	11%
Couple/few nights	45%
A week	13%
Longer than a week	7%

Q. How long did you stay in the Richmond region on your last visit?

PURPOSE OF VISIT

Leisure/vacation (60%) and visiting family, relatives or friends (36%) were the most common reasons for visiting the Richmond region.

Q. What were the main reasons for your last visit to the Richmond region? (check all that apply)

MODE OF TRANSPORTATION

Nearly eight in ten previous visitors to the Richmond region arrived via automobile or motorcycle, one in seven arrived via commercial airline. Higher income visitors (over $200k) were more likely to travel via commercial airline (21% vs 14%).

Mode of Transportation
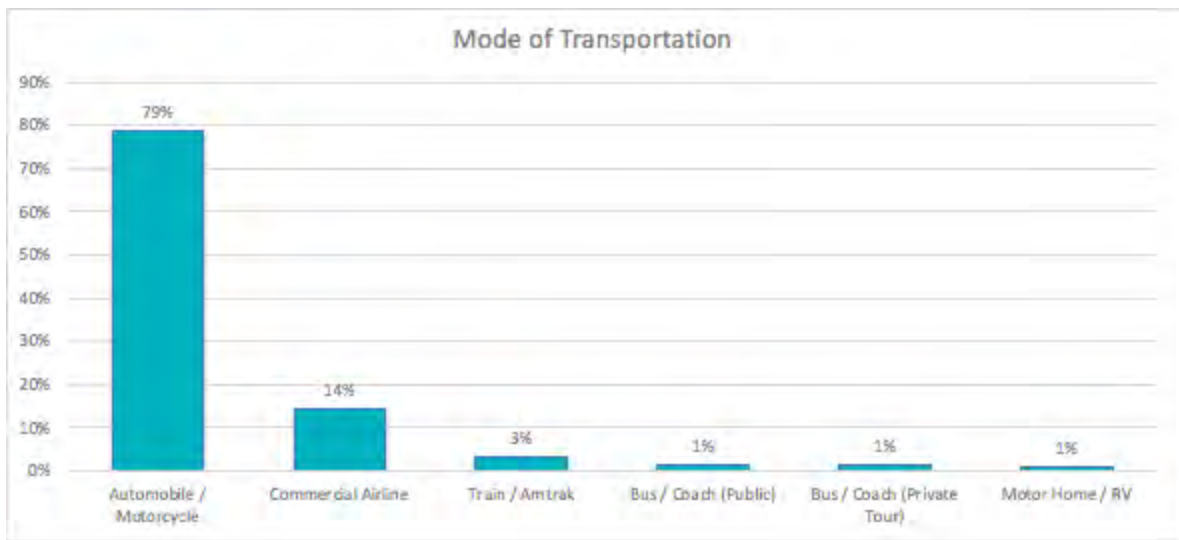
Q. How did you get to the area?

ACCOMMODATIONS

More than half of previous visitors stayed in a hotel/motel during their most recent visit to the Richmond region. Roughly one in five stayed with friends or family, while one in twenty stayed in an Airbnb, VRBO, Homeaway or similar.
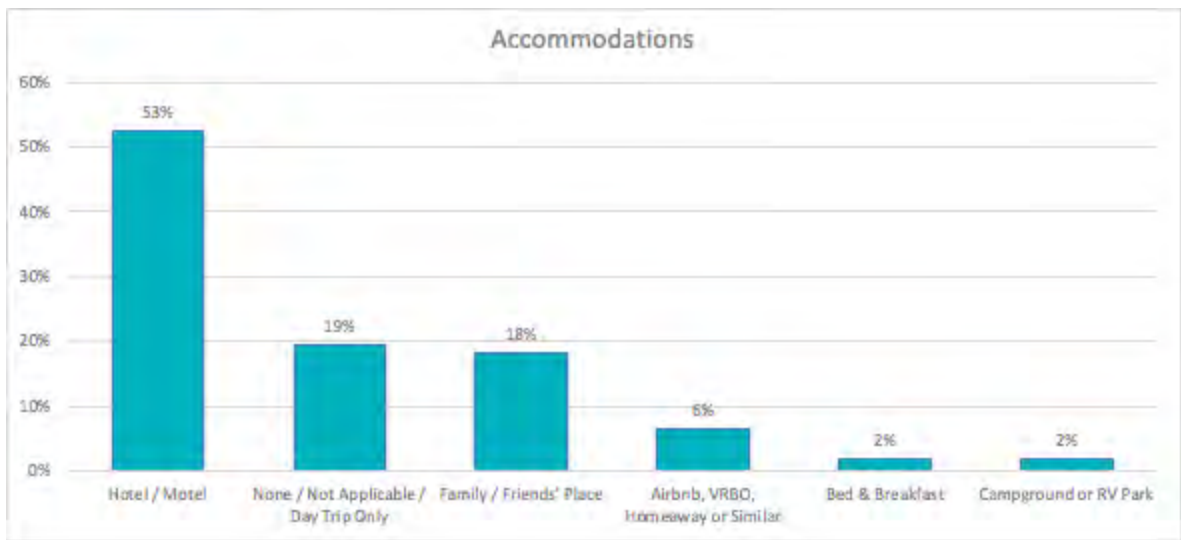
Q. What kind of accommodation did you use during your visit?

FREQUENCY OF VISIT

More than 40% of previous visitors indicated they are regular visitors to the Richmond region, while 25% indicated they visit the area occasionally (less than once a year). Approximately 20% of previous visitors said this was their first time in the Richmond region. Not surprisingly, respondents who indicated the purpose of their trip was visiting friends and family were more likely to indicate they were a regular visitor (62% vs 42%).
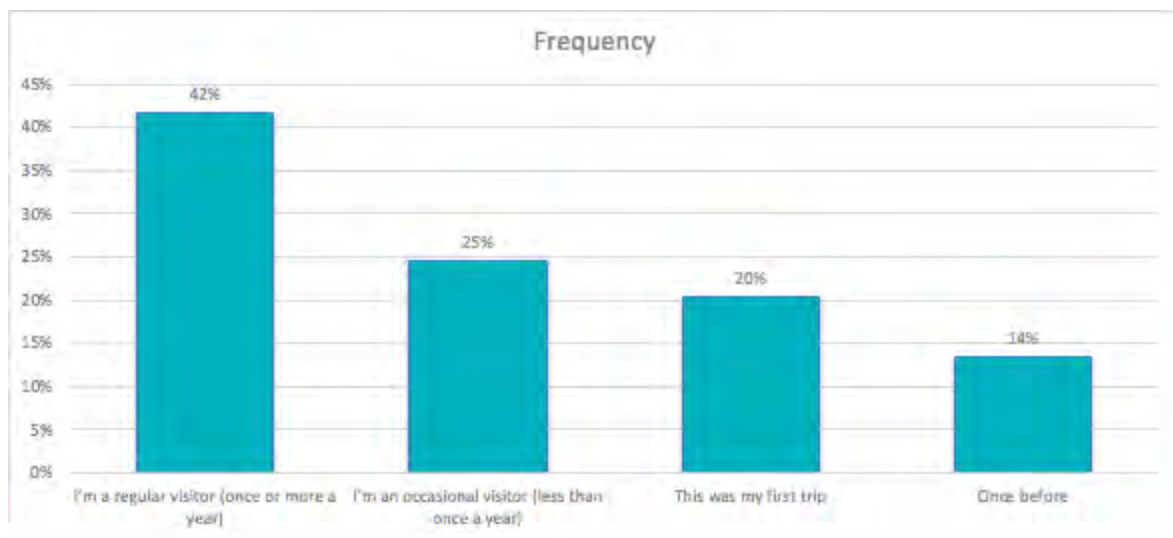
Q. How frequently do you come to the Richmond region?

PERCEPTIONS OF RICHMOND

RICHMOND REGION KEY WORDS

When asked for the top three words that come to mind when thinking of the Richmond region, the most common responses from previous visitors were 'history', 'historic', 'food', 'fun', 'culture', 'beauty', 'friendly', 'war', 'restaurant' and 'civil.' The word cloud below highlights the words given by previous visitors, with the larger words being suggested more frequently.


Q. What are the first three words or phrases that come to mind when you think of Richmond?

PERCEPTION OF RICHMOND REGION

Half of previous visitors indicated they had either an 'excellent' or 'very good' perception of the Richmond region prior to their visit. This number grew to an impressive 82% following their time in the region. A deeper dive reveals that nearly 20% of previous visitors had a 'neutral' perception of the Richmond region prior to their visit and this number falls below 4% following their visit. On the other hand, roughly 16% of previous visitors had an 'excellent' perception of the region prior to their visit and this number climbs to 36% following their visit.

This insight reveals the potential for tourism to impact perception of a community. This is incredibly important, as increasingly reputation, identity and the perceived quality of place determine where talent, capital and tourism flow.
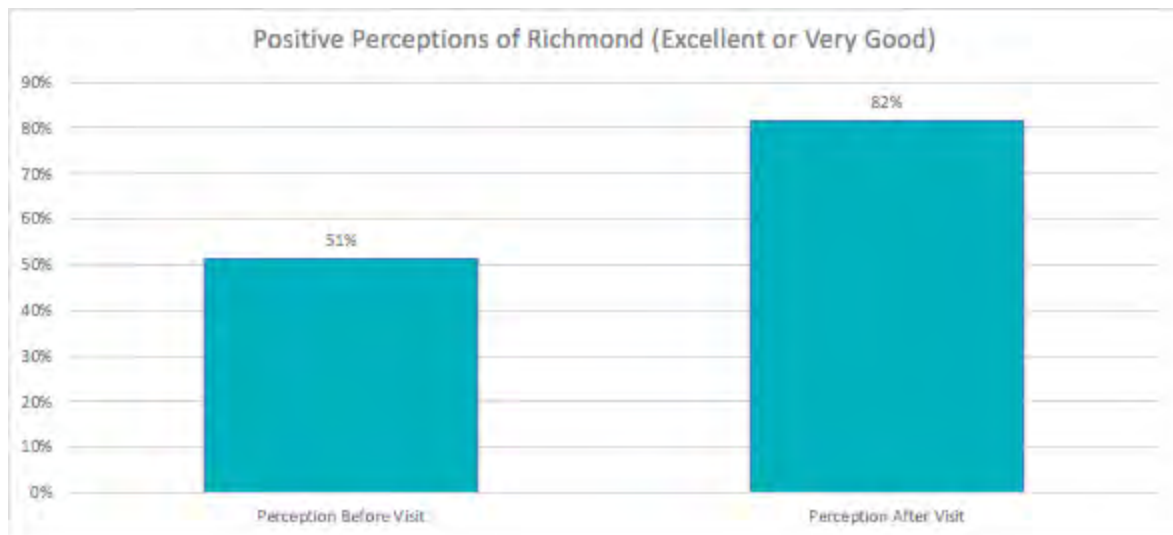
Q. On the whole, what was your perception of the Richmond region?

POSITIVE ASPECTS OF RICHMOND EXPERIENCE

When asked what aspects of their most recent visit they found excellent, outstanding or liked the most, the most common responses from previous visitors were 'restaurant', 'museum', 'historic', 'food', 'history', 'people', 'friendly', 'art', 'walk', 'shops', 'civil', 'war', 'downtown' and 'river.' The word cloud below highlights the words given by previous visitors, with the larger words being suggested more frequently. For younger visitors (under 35, the top words used were 'restaurant', 'food', 'people', 'art' and 'downtown.' For older visitors (55 and above) the top words used 'museum', 'historic', 'restaurant', 'history' and 'food.'

Q. What aspects of your last visit did you find excellent, outstanding or like the most?

NEGATIVE ASPECTS OF RICHMOND EXPERIENCE

When asked what aspects of their most recent visit they found negative, disappointing or liked the least, the most common responses from previous visitors were 'none', 'traffic', 'nothing', 'park', 'area', 'city', 'downtown', 'around', 'street', 'hotel', 'road', 'lack' and 'find.' The words 'area' and 'lack' were most commonly used when discussing parts of the region where they experience was lacking in terms of tourism product and safety. The words ''around' and 'find' were mostly commonly used to express frustration in navigating the region. The word cloud below highlights the words given by previous visitors, with the larger words being suggested more frequently.
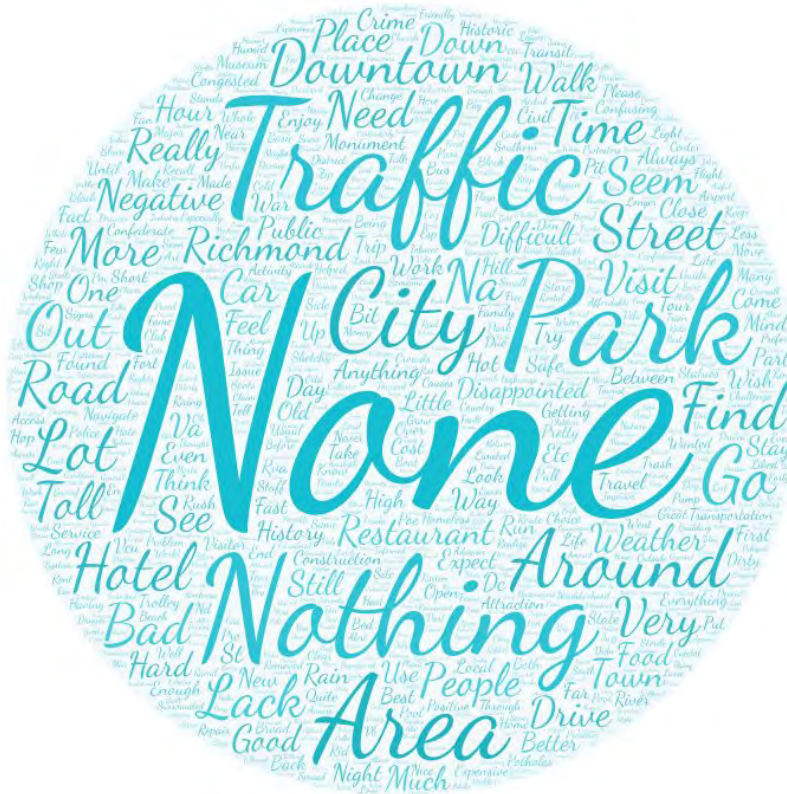
Q. What aspects of your last visit did you find negative, disappointing or like the least?

REGIONAL VISITATION

Nearly nine in ten previous visitors visited the City of Richmond and more than half visited Henrico County. The least visited areas of the region were Powhatan County and New Kent County. African American visitors were less likely to visit the City of Richmond (77% vs 89%) and more likely to visit Chesterfield County (42% vs 25%).

Q. On all your visits to the Richmond region, which of these specific areas did you visit? (check all that apply)

REGIONAL EXPERIENCE

More than eight in ten visitors indicated their experience was either 'excellent' or 'very good' in the City of Richmond, New Kent County and Henrico County. Roughly seven in ten visitors indicated they had an 'excellent' or 'very good' experience in Chesterfield County, Hanover County, Powhatan County and the Town of Ashland.

Regional Experience (Excellent or Very Good)
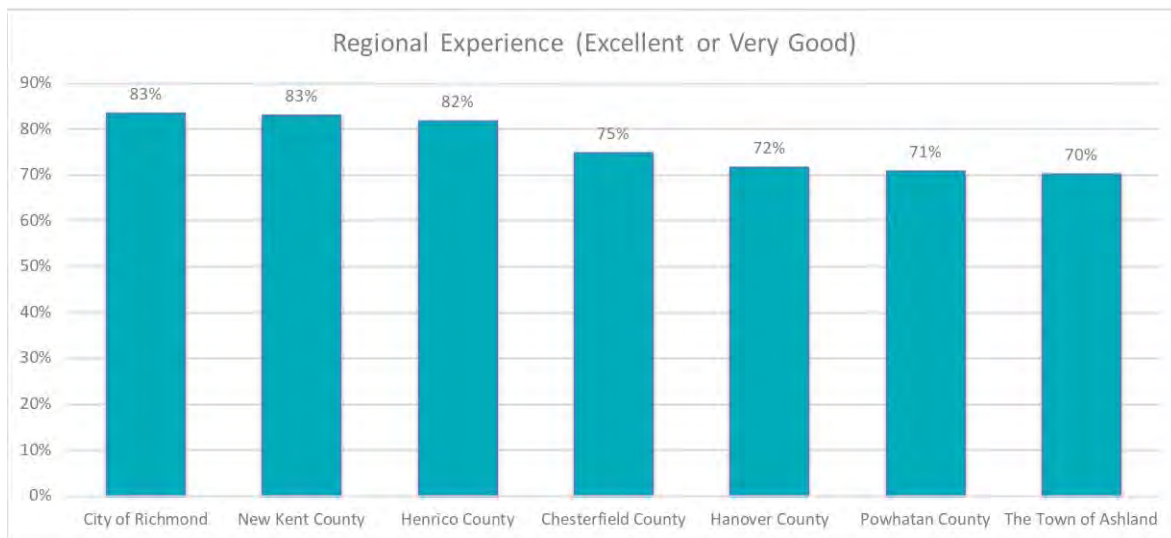
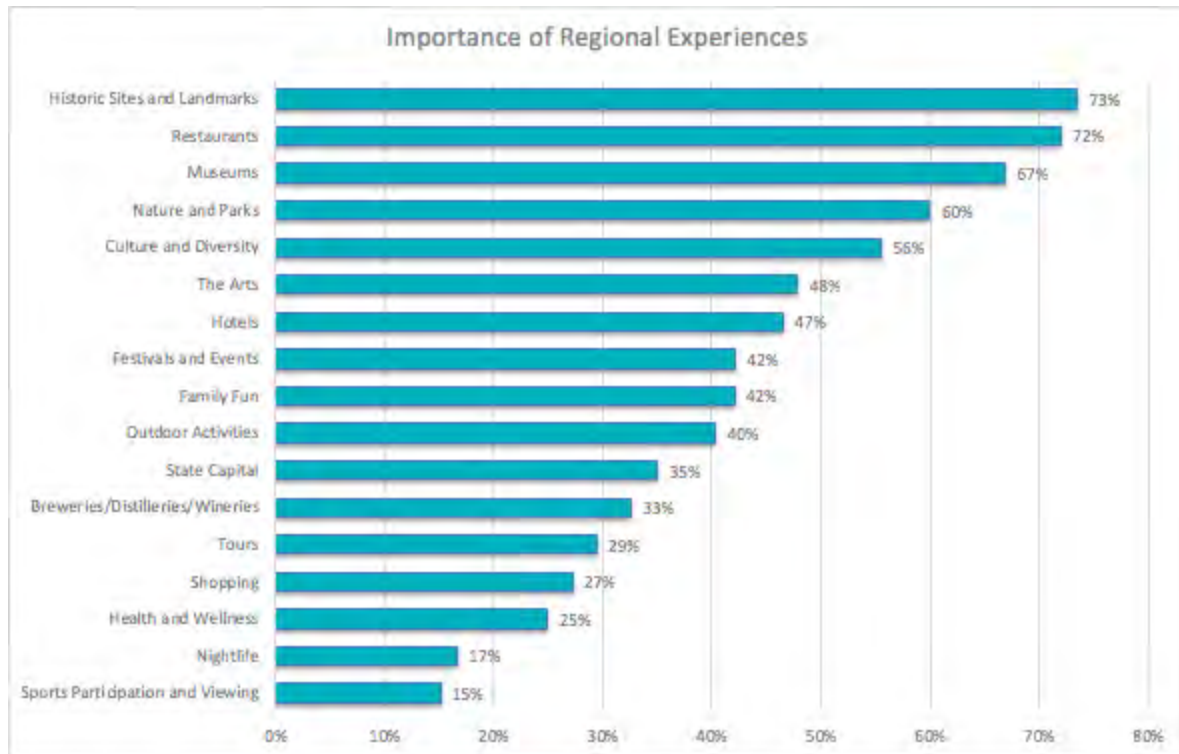Q. On the whole, what was your perception of the areas you visited?

IMPORTANCE OF RICHMOND EXPERIENCES

More than seven in ten previous visitors indicated that 'historic sites and landmarks' and 'restaurants' were important aspects of the Richmond region experience when deciding to visit the destination. Two-thirds indicated that 'museums' were important, while roughly six in ten indicated 'nature and parks' and 'culture and diversity' were important. The least important aspects were 'shopping', 'health and wellness', 'nightlife' and 'sports participation and viewing.'

Younger visitors (under 35) were more likely to cite 'restaurants' (85% vs 72%), 'the arts' (57% vs 48%), 'outdoor activities' (54% vs 40%), 'breweries/distilleries/wineries' (54% vs 33%) and 'nightlife' (33% vs 17%) as important. These younger visitors were less likely to cite 'historic sites and landmarks' (55% vs 73%) and 'museums' (54% vs 67%) as important. Older visitors (55 and above) were more likely to cite 'historic sites and landmarks' (79% vs 73%) and the 'state capital' (40% vs 35%) as important.

Higher income visitors (over $200k) were more likely to cite 'historic sites and landmarks' (79% vs 73%), 'restaurants' (78% vs 72%), 'nature and park's (69% vs 60%), 'culture and diversity' (64% vs 56%) and 'breweries/distilleries/wineries' (50% vs 33%) as important.

African American visitors were more likely to cite 'restaurants' (82% vs 72%), 'festivals and events' (69% vs 42%), 'culture and diversity' (69% vs 56%) and 'shopping' (58% vs 27%) as important. They were less likely to cite 'historic sites and landmarks' (62% vs 73%), 'museums' (60% vs 67%) and 'state capital' (29% vs 35%) as important.

Importance of Regional Experiences

Experience	Percentage
Historic Sites and Landmarks	73%
Restaurants	72%
Museums	67%
Nature and Parks	60%
Culture and Diversity	56%
The Arts	48%
Hotels	47%
Festivals and Events	42%
Family Fun	42%
Outdoor Activities	40%
State Capital	35%
Breweries/Distilleries/Wineries	33%
Tours	29%
Shopping	27%
Health and Wellness	25%
Nightlife	17%
Sports Participation and Viewing	15%

Q. Which aspects of the Richmond "experience" were (are) important to you in deciding to visit the area?

QUALITY OF RICHMOND EXPERIENCES

More than eight in ten previous visitors indicated that 'historic sites and landmarks' and 'restaurants' were important high quality experiences in the Richmond region. Roughly two-thirds indicated that 'museums' and 'nature and parks' were high quality. The lowest quality aspects were 'tours', 'health and wellness', 'nightlife' and 'sports participation and viewing.'

Q. How would you rate the overall quality of the following Richmond region visitor experiences?
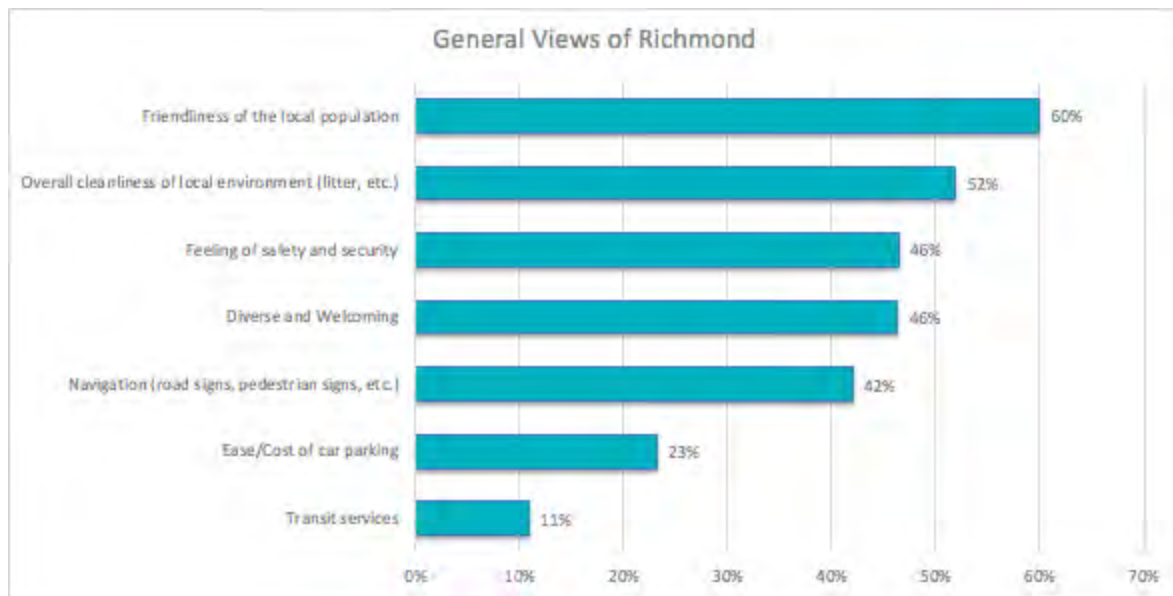
RICHMOND EXPERIENCE COMBINED

The chart below shows the intersection of Richmond region experiences in terms of importance and quality as rated by previous visitors. Experiences in the upper-right quadrant were rated as important in the decision to visit the Richmond region and as quality experiences. Experiences in the lower-left quadrant were rated as less important to the decision to visit the Richmond region and of lesser quality.
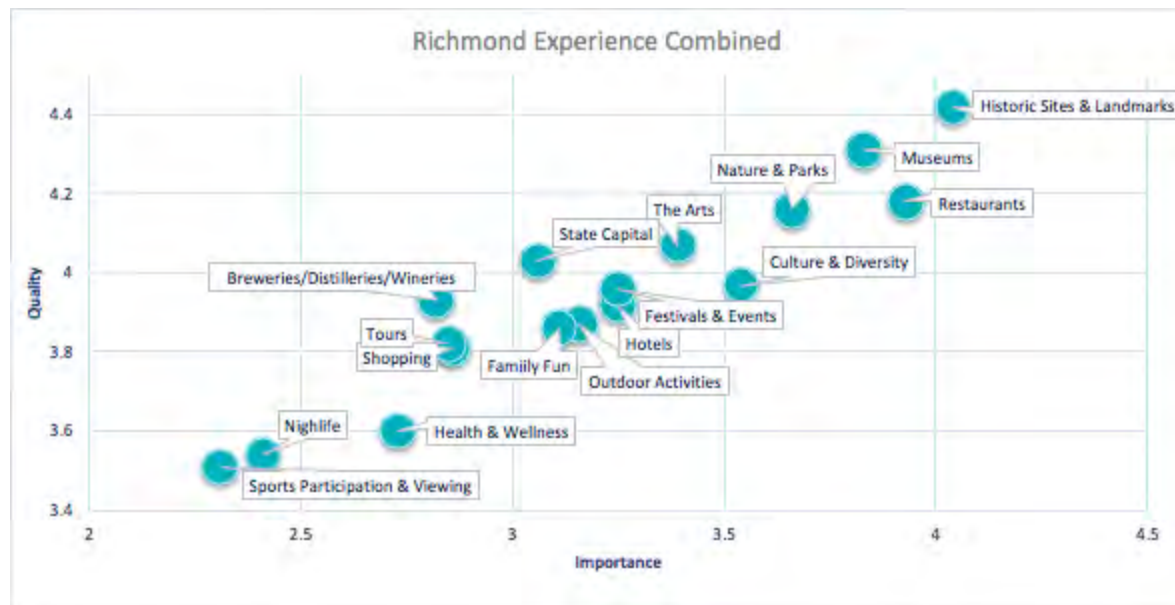
PERCEPTIONS OF RICHMOND

The majority of previous visitors view Richmond as a friendly destination and roughly half feel the destination is clean and diverse and welcoming. Only 20% of previous visitors rated Richmond positively for parking and that number fell to one in ten for transit services.

General Views of Richmond

- Friendliness of the local population — 60%
- Overall cleanliness of local environment (litter, etc.) — 52%
- Feeling of safety and security — 46%
- Diverse and Welcoming — 46%
- Navigation (road signs, pedestrian signs, etc.) — 42%
- Ease/Cost of car parking — 23%
- Transit services — 11%

Q. Rate your views of Richmond on:

RESONANCE

VANCOUVER
801-602 Hastings St W
Vancouver, BC V6B 1P2
info@resonanceco.com
+1.604.681.0804

NEW YORK
110 East 25th
New York, NY 10010
info@resonanceco.com
+1.646.233.1383