



WILLIAMSBURG
TOURISM COUNCIL

2019 Advertising Effectiveness & ROI

December 2019

Insights

- The Williamsburg Tourism Council influenced more than 350,000 trips to the destination in 2019 with its paid promotions. This resulted in more than \$400 million in influenced visitor spending, or \$86 for every \$1 spent on marketing.
- This certainly represents a positive impact from these efforts. Additionally, some preliminary findings from this research are suggestive of other possible strategies to further impact visitation and spending.
- First, the movement into additional markets beyond the traditional ones essentially helped to double the impact seen in this research. This suggests the new markets may need to be a key ingredient to additional growth. Especially to the degree that the appeal of the destination with its strong history skew is a niche market.
- Unique destinations like Williamsburg have the capability to draw from a broad geography because of niche appeal. These results confirm that. Going forward, consideration of using behavioral targeting of cultural and history travelers and disregarding market targeting could be a growth strategy.
- Messaging seems essentially to be on target – and the creative that was tested was well liked. If new messaging is developed, it should be considered in light of the image and communication insights in this report.
- Additional targeting and strategic considerations will be developed following the completion of the visitor profile research.

350,306

Influenced
trips

\$405.9 million

Influenced
visitor
spending

\$86

Return on
investment

Background

- The Williamsburg Tourism Council (WTC) is responsible for encouraging travel to the area including the use of paid promotional efforts.
- In order to be accountable for the resources invested in these efforts, the WTC has retained Strategic Marketing & Research Insights (SMARInsights) to measure the reach and impact of its marketing.
- The specific objectives of this research are to:
 - Measure the reach of the advertising among a targeted audience;
 - Evaluate the effectiveness of the marketing through SMARInsights' destination marketing organization (DMO) cost-per-aware household benchmarking;
 - Understand the overlap and potential impact of multiple media;
 - Determine the ability of the creative to communicate desired messages, again using SMARInsights' benchmarking;
 - Assess the ability of the advertising to improve the image of the state, motivate interest in visiting, and increase visitation;
 - Calculate the number of influenced trips, visitor spending, and return on investment of the media campaigns; and
 - Forward insights into future refinement of the marketing.

Methodology

- SMARInsights' advertising effectiveness methodology requires respondents to view the actual advertising in order to gauge awareness, so we developed and programmed an online survey. National sample vendors provided a survey link to potential respondents.
- In order to qualify for the survey, respondents had to be travel decision makers who regularly take overnight leisure trips of at least 50 miles from home.
- In order to evaluate individual target markets, quotas were set to 300 surveys per traditional markets and 150 completed interviews in additional planned markets for a total sample of nearly 3,900. The actual number of complete surveys was subsequently modified in light of the size of some of the DMAs. The actual number of completed interviews are illustrated in the table at right.
- Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the results of the survey. The questionnaire and the ads tested appear in the Appendix to this report

TRADITIONAL MARKETS	
Harrisonburg, VA	114
Charlottesville, VA	144
Salisbury, MD	234
Greenville, New Bern, Washington, NC	300
Baltimore, MD	491
Roanoke, Lynchburg, VA	300
Washington, D.C. (Hagerstown, MD)	495
Raleigh Durham (Fayetteville), NC	301
	2,379
EXPANSION MARKETS	
Charleston, Huntington, WV	150
Johnstown, Altoona State College, PA	151
Greensboro, High Point, Winston Salem, NC	150
Knoxville, TN	150
Charlotte, NC	151
Pittsburgh, PA	151
Wilkes Barre, Scranton, PA	151
Harrisburg, Lancaster, Lebanon, York, PA	152
Philadelphia, PA	156
Florence, Myrtle Beach, SC	150
	1,512

Campaign Overview

- The campaign consisted of digital, video, print, and OTT. The media budget for the year was close to \$5 million.
- The campaign itself focused upon “*funexpected.*”
- A total of three videos, two print ads, and 9 digital assets were tested.

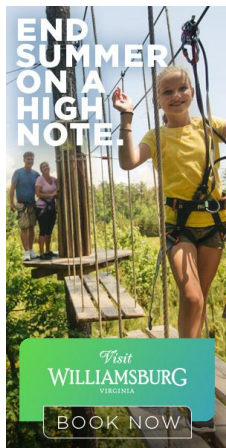
Digital	\$2,375,960
TV	\$1,095,000
OTT	\$925,000
Print	\$349,605
Total	\$4,745,565

Video



Print

Digital

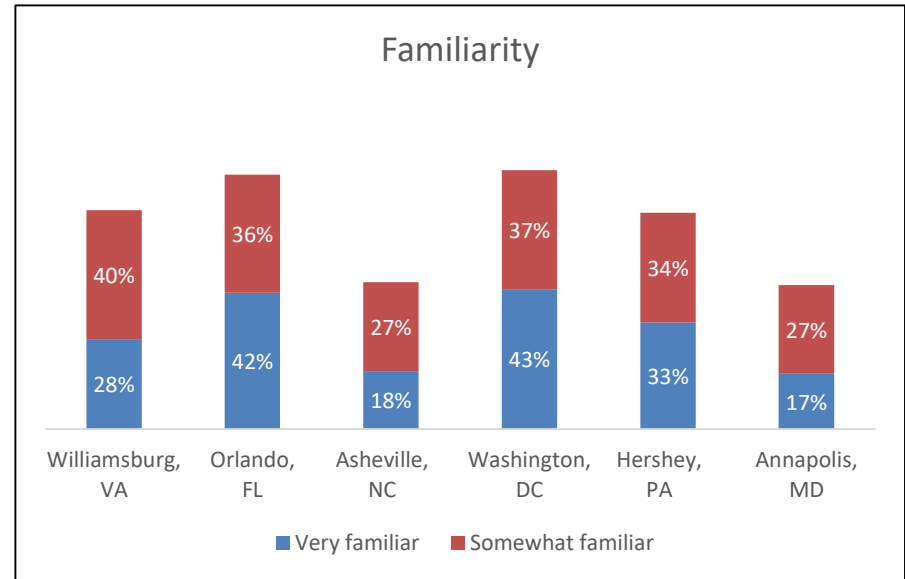




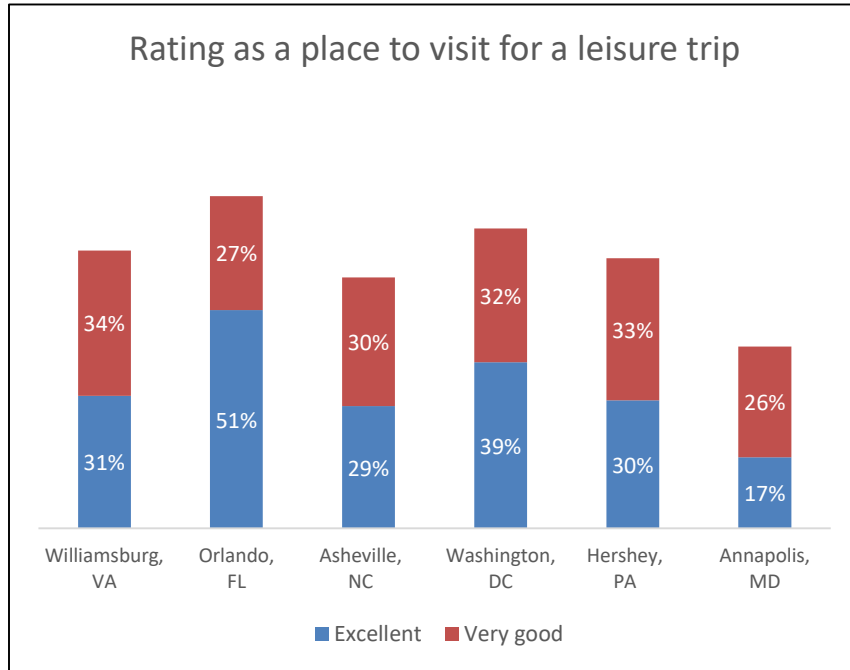
COMPETITIVE SITUATION

Familiarity

- Not surprisingly, Orlando (Disney) and Washington, DC, have the strongest familiarity overall.
- Williamsburg and Hershey, which both represent perhaps a narrower niche of attractions, represent a second tier of familiarity
- Asheville and Annapolis are significantly less familiar to travelers.



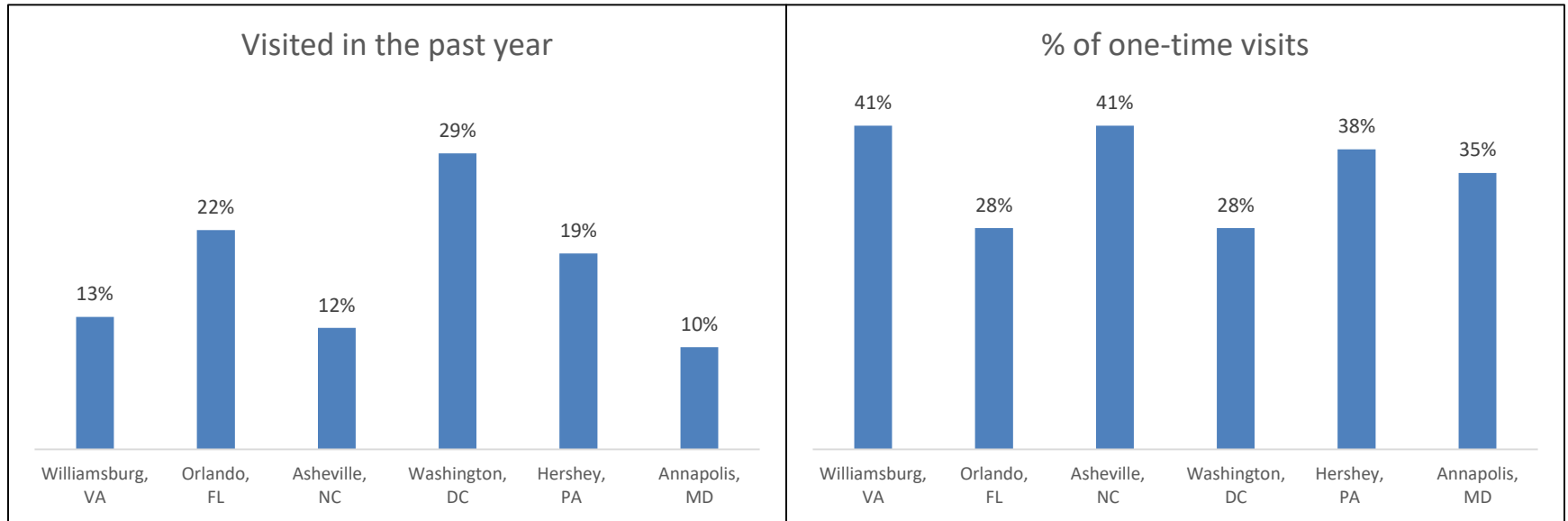
Overall Rating



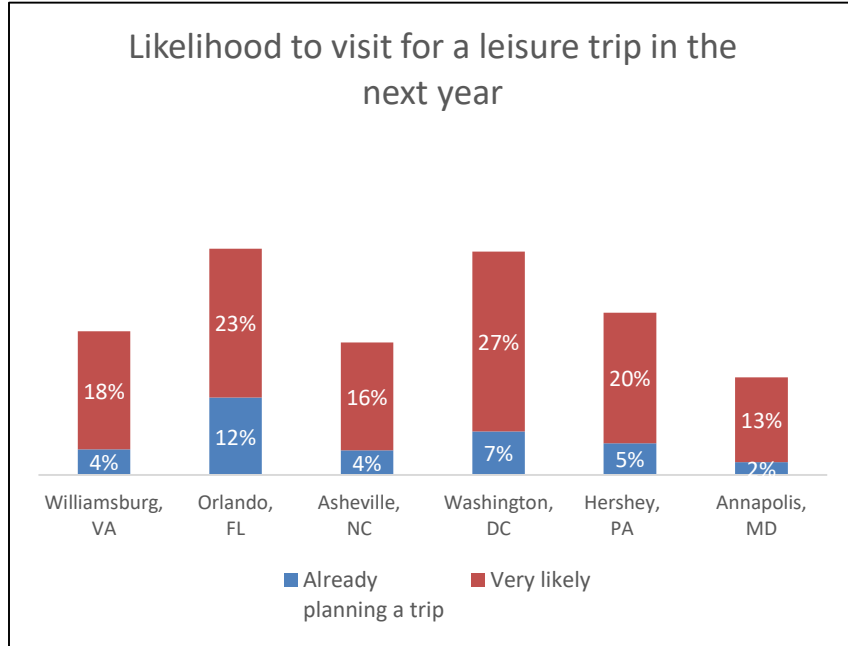
- Familiarity is often a measure of past experience, while an overall rating as a place to visit is more about strength of appeal.
- Orlando not surprisingly again is the strongest by far, reaching nearly 80% positive rating.
- Williamsburg does quite well in this context, falling just behind DC and realizing almost two-thirds positive mention.

Visitation

- All these destinations offer unique appeal which results in high levels of repeat.
- Williamsburg's visitation rate is 13% of the surveyed DMA – lower than all but the two city destinations.
- DC has the highest level of visitation in the last year and has the highest repeat level with Orlando.



Likelihood to Visit in the Next Year



- Finally, future likelihood is reflective of all the measures seen thus far, with Disney and DC remaining dominant and Williamsburg among the less likely to be visited.

Image Considerations

- Each of these destinations is iconic to some extent. Several of them are unquestionably best in class.
- As such, when reviewed from an image perspective, there are many ways in which they are simply not comparable.
- While this is not an image study per se, it still can provide some helpful context for strategies and communications going forward to consider some of the image strengths and weaknesses.
- However, being compared to iconic attractions almost makes each of them somewhat of a caricature.
- Specifically, respondents rated these destinations in terms of their attributes and appeals.
- The next two tables provide a summary of all those ratings and exhibits some of the clear differences.
- For Williamsburg, the destination is rated well on nearly everything and only pales in the context of DC and Orlando.

Destination Attributes

Above-average across destinations
Average across destinations
Below-average across destinations

Mean ratings on 5-point scale (1 = poor, 5 = excellent)	Williamsburg, VA	Orlando, FL	Asheville, NC	Washington, DC	Hershey, PA	Annapolis, MD
Historic sites and landmarks	4.26	3.25	3.86	4.49	3.55	3.75
Family friendly	4.20	4.51	3.94	3.92	4.34	3.67
The combination of history and entertainment	4.13	3.38	3.77	4.19	3.63	3.55
Quality of experience	3.97	4.17	3.90	4.01	3.96	3.60
Hospitality	3.95	4.11	3.95	3.54	3.99	3.62
Must-see attractions	3.88	4.29	3.76	4.28	3.91	3.43
Variety of recreational activities	3.81	4.22	3.71	3.77	3.87	3.36
Variety of local art and handicrafts	3.77	3.49	3.86	3.61	3.58	3.53
Shopping	3.73	3.97	3.70	3.65	3.72	3.51
Festivals and events	3.69	3.96	3.71	3.74	3.73	3.45
Value for the money	3.67	3.45	3.61	3.49	3.66	3.45
Evening activities	3.59	4.11	3.71	3.69	3.66	3.51
Live music and concerts	3.39	3.90	3.59	3.54	3.64	3.32

- The overall ratings for these destinations are generally reflective of the preference data already seen. Orlando is strong in everything but authenticity and value. And Williamsburg is nearly the anti-Orlando

Destination Appeals

Above-average across destinations
Average across destinations
Below-average across destinations

Mean ratings on 5-point scale (1 = poor, 5 = excellent)	Williamsburg, VA	Orlando, FL	Asheville, NC	Washington, DC	Hershey, PA	Annapolis, MD
Is a good place to experience history	4.29	3.15	3.76	4.43	3.46	3.70
Nationally known attractions	4.13	4.45	3.78	4.47	3.95	3.56
A place to learn and discover new things	4.12	3.84	3.78	4.31	3.70	3.55
Is a good place for adults	4.11	4.06	4.03	4.31	3.86	3.81
Provides a memorable experience with my family	4.06	4.40	3.81	4.13	4.07	3.52
Is a good place for kids	4.04	4.56	3.50	3.87	4.34	3.44
A fun place to visit	4.04	4.39	3.88	4.02	4.15	3.59
A place I would recommend to friends/family	4.02	4.23	3.81	4.08	4.05	3.60
Offers restaurants and dining options that meet my needs	3.96	4.15	3.86	3.94	3.90	3.75
Offers lodging options that meet my needs	3.95	4.11	3.76	3.71	3.89	3.54
Has amenities/attractions that I'm interested in	3.93	4.13	3.78	4.10	3.83	3.50
Interesting museums	3.91	3.18	3.61	4.42	3.41	3.44
An easy/convenient place to get to	3.90	3.58	3.72	3.60	3.90	3.65
An experience that is relevant to me	3.88	3.95	3.73	4.07	3.79	3.51
A place you can visit over and over again	3.83	4.18	3.76	4.08	3.85	3.41
Is expensive	3.43	4.38	3.51	3.88	3.63	3.51
Is crowded	3.41	4.48	3.19	4.06	3.70	3.37

Perceptual Mapping

- Perceptual mapping is another way to consider all these findings simultaneously and can visually illustrate strengths and differences.
- This exercise displays each destination's unique appeal:
 - Orlando is simply a must-see attraction. Every parent's obligation.
 - Hershey is a warm fuzzy family experience.
 - DC is museums.
 - Williamsburg is history.
 - Asheville is local crafts.
 - Annapolis is the least well defined.

Washington DC

Interesting museums

Must-see attractions
Is crowded

Orlando
Nationally known

Historic sites

A place you can visit over and over again
A place to learn

good for adults

recreational activities

Quality of experience

memorable

Evening activities

relevant
recommend

Festivals and events

Live music

Is expensive

history and entertainment

dining

experience history

Shopping

good for kids

amenities/attractions

Value

fun

Williamsburg

lodging

Family friendly

An easy/convenient place to get to

local art and handicrafts

Annapolis

Hershey

Hospitality

Asheville

Image Drivers

- Correlation of Williamsburg's ratings with its overall destination rating shows what drives appeal.
- Interestingly, it is the experience and attractions, not the historic sites alone.
- And – positively – it is viewed by those who like it as *fun*.

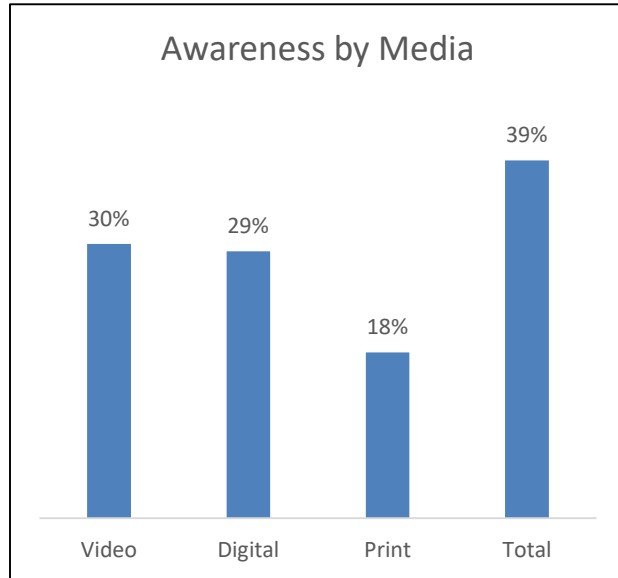
	Correlation with overall rating of the Williamsburg, VA, area
Quality of experience	0.42
Must-see attractions	0.38
The combination of history and entertainment	0.33
Hospitality	0.33
Value for the money	0.33
Variety of recreational activities	0.31
Festivals and events	0.31
Variety of local art and handicrafts	0.31
Family friendly	0.31
Evening activities	0.29
Shopping	0.28
Live music and concerts	0.27
Historic sites and landmarks	0.26

	Correlation with overall rating of the Williamsburg, VA, area
Has amenities/attractions that I'm interested in	0.42
A fun place to visit	0.40
An experience that is relevant to me	0.38
A place I would recommend to friends/family	0.38
Provides a memorable experience with my family	0.38
A place you can visit over and over again	0.37
Is a good place for adults	0.35
Offers restaurants and dining options that meet my needs	0.34
A place to learn and discover new things	0.33
Offers lodging options that meet my needs	0.30
Nationally known attractions	0.30
Is a good place for kids	0.30
Interesting museums	0.29
An easy/convenient place to get to	0.26
Is a good place to experience history	0.24
Is crowded	0.12
Is expensive	0.08



MARKETING AWARENESS

Overall Awareness



- Overall, the campaign generated 39% awareness among traveling households in the marketed DMAs.
- This resulted in more than 4.3 million aware households.
- The strongest performing medium was video, with TV typically being an excellent reach medium.
- Digital performs equally strongly despite a larger media investment. This is potentially indicative of much of the digital being used in retargeting and as such not building additional awareness.
- Print, as is typically the case, yielded less reach.

Cost Per Aware Household

- In terms of the media efficiency, we typically see a very low cost per aware household with digital buys. This is not the case here, suggesting significant retargeting investment and reaching some people over and over.
- At the same time, the efficiency of print is surprisingly good.
- Overall, this campaign performance in terms of cost per aware household is below SMARInsights' average. This is probably the result of some targeting strategies.

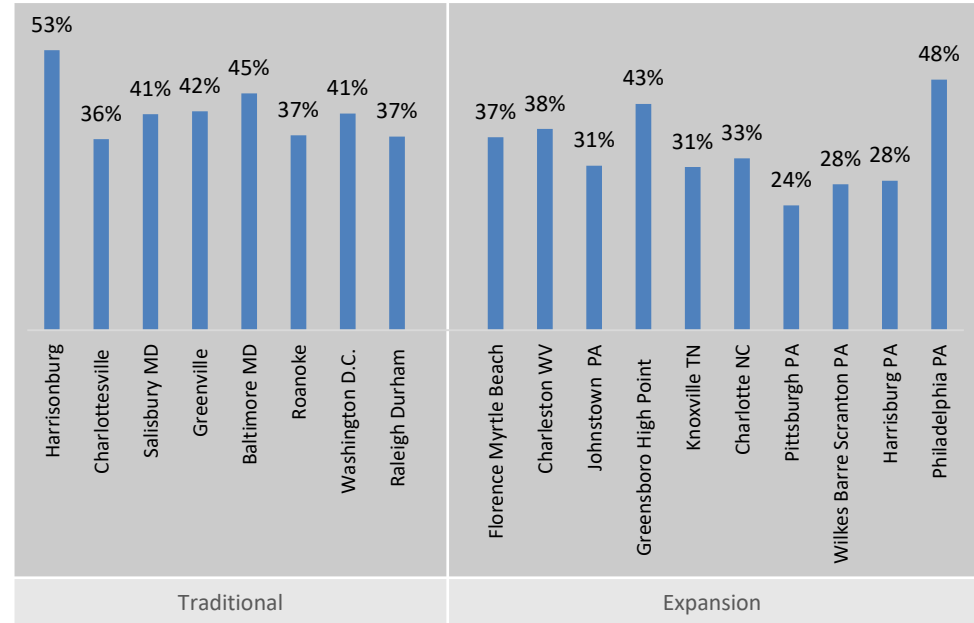
	Aware	Aware Household	Media Spend	Cost per Aware Household
Video	30%	3,357,130	\$2,020,000	\$0.60
Digital	29%	3,266,702	\$2,375,960	\$0.73
Print	18%	2,030,857	\$349,605	\$0.17
Total	39%	4,378,210	\$4,745,565	\$1.08



Awareness by Market

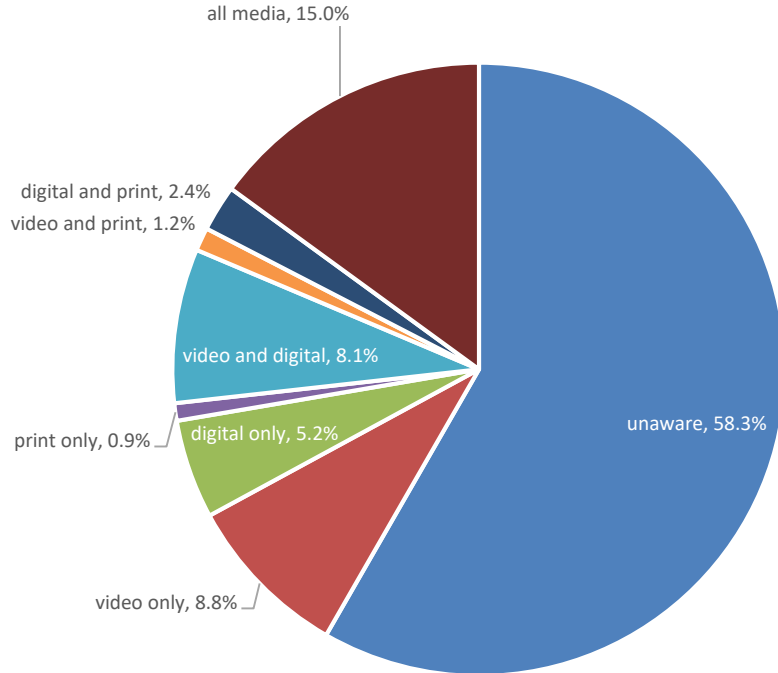
- There was some variance in awareness by individual DMA. Not surprisingly, the traditional, more proximate markets on average had slightly higher awareness than the expansion markets.
- In fact, overall the traditional markets were nearly 4 points higher at 40.5% aware compared to the newer markets at 36.9%.

Awareness by Market



	Harrisonburg	Charlottesville	Salisbury MD	Greenville	Baltimore MD	Roanoke	Washington D.C.	Raleigh Durham	Florence Myrtle Beach	Charleston WV	Johnstown PA	Greensboro High Point	Knoxville TN	Charlotte NC	Pittsburgh PA	Wilkes Barre Scranton PA	Harrisburg PA	Philadelphia PA
TRAVELING HHS	70,887	59,242	128,020	238,572	884,389	347,300	1,956,577	911,328	230,427	340,609	218,996	545,140	406,542	940,061	916,574	438,181	564,937	2,324,812
AWARENESS	53%	36%	41%	42%	45%	37%	41%	37%	37%	38%	31%	43%	31%	33%	24%	28%	28%	48%
AWARE HHS	37,720	21,503	52,555	99,246	398,069	128,630	805,359	335,514	84,490	130,233	68,436	234,410	126,028	307,148	217,800	121,476	160,619	1,107,053

Media Mix



- SMARInsights consistently has found that destinations have more impact when there is exposure to multiple elements of the campaign.
- While this campaign was not particularly efficient, part of this can be attributed to an excellent level of media overlap, which should in turn result in greater impact.
- In fact, 15% of the population recalled seeing elements from all three portions of the media mix.
- While digital and video have some level of singular exposure, print was almost always seen in concert with other media.

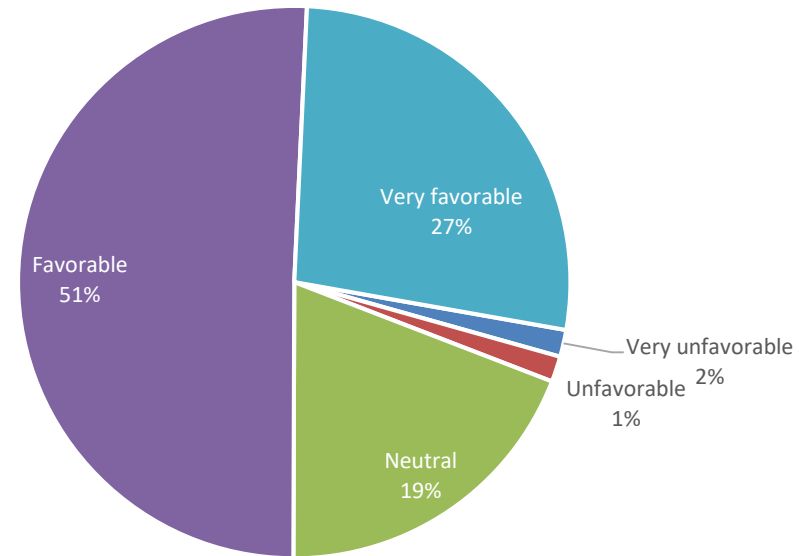


CREATIVE RATINGS

Overall Reaction

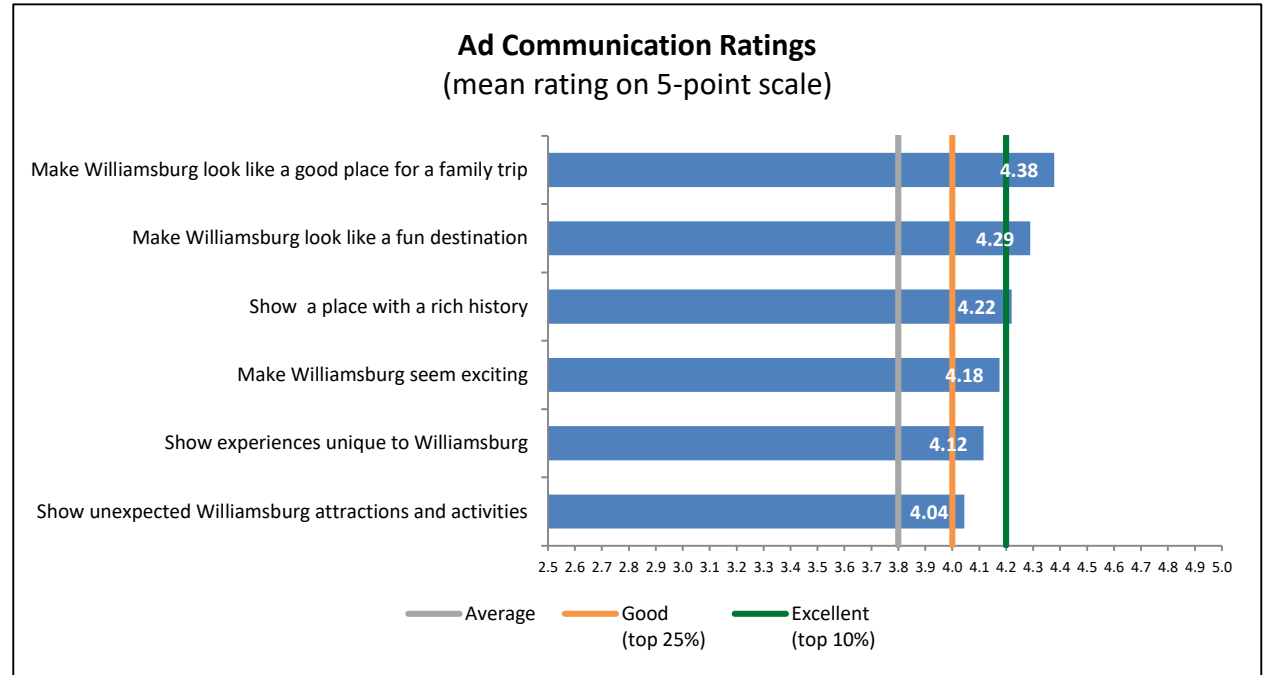
- While the campaign is evaluated on image and communication attributes for which we have normative data, it is helpful to consider the overall reaction of respondents to the ads.
- And the result seen here is overwhelmingly favorable. The campaign is well liked, with nearly 80% providing a favorable rating. In fact, only 3% are unfavorable.
- But being liked isn't ultimately what matters. Communicating and motivating matter.

Overall Reaction to the Ads



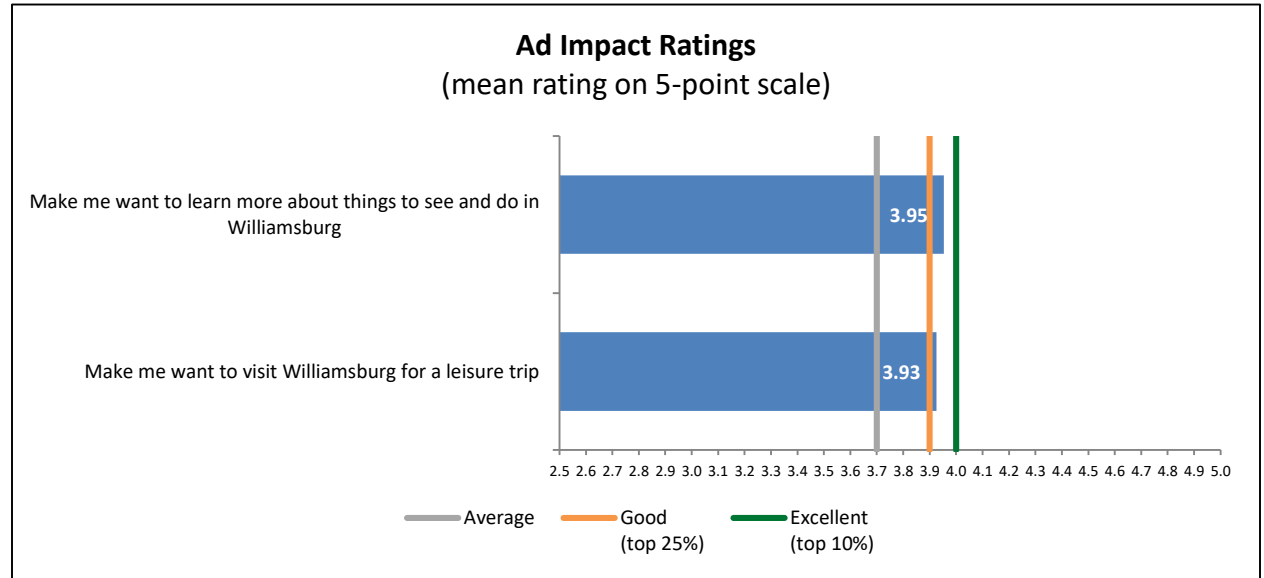
Communication Ratings

- The ad communication ratings are compared to those of hundreds of other destination campaigns we have tested.
- The worst rated attribute is still in the top 25% – and that is “showing the unexpected.”
- These ads make Williamsburg look appealing and fun.



Impact Ratings

- While the communication attribute performance was essentially best in class, the impact ratings are somewhat less effective.
- However, these scores are still in the top fourth of all campaigns we have tested.
- This is an excellent performance and suggests this campaign, while somewhat less efficient than average, should prove impactful.



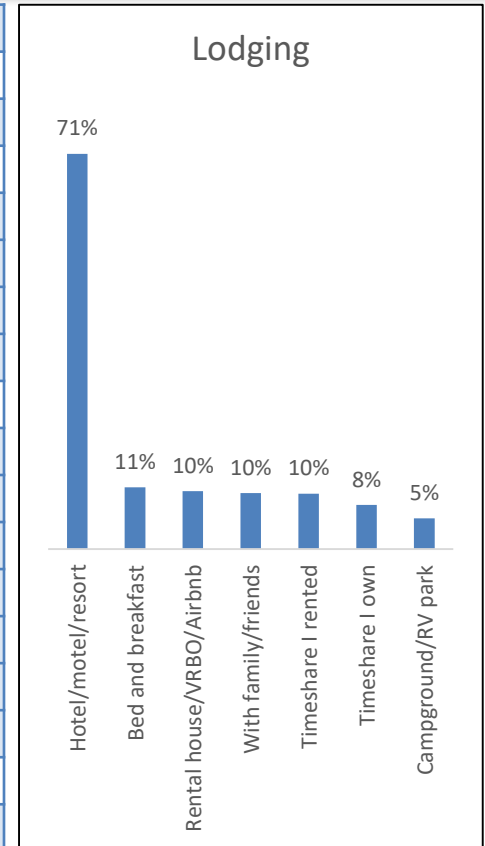


TRIP SPECIFICS

Trip Specifics

- A full visitor profile will be developed with additional interviews to obtain a richer sample of visitors and a deeper understanding of their planning and motivation. Nonetheless, this research does provide initial trip profiling data.
- This shows a younger, better educated and slightly higher income visitor coming with kids and staying in hotels.

Length of trip	3.3 Days
Party size	3.5
Number of children on trip	1.1
EDUCATION	
High school or less	14.0%
Some college or 2-year college degree	31.2%
4-year college degree	34.7%
Graduate studies or graduate degree	20.1%
INCOME	
Less than \$50,000	29.2%
\$50,000 - \$59,999	11.2%
\$60,000 - \$74,999	11.6%
\$75,000 - \$99,999	18.3%
\$100,000 - \$124,999	11.4%
\$125,000 - \$149,999	7.7%
\$150,000 or more	10.5%
AGE	
18-34	34.3%
35-54	38.5%
55+	27.2%



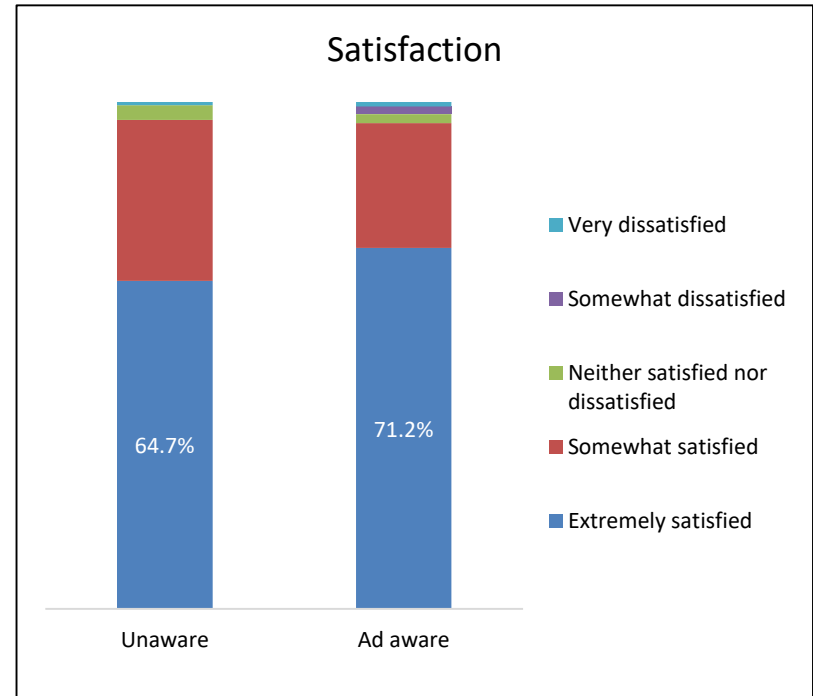
Activities

- A look at the activities in which visitors participated illustrates a fairly active stay.
- While Busch Gardens received the most mentions, there are a substantial number of visits to many of the historic sites.
- When the richer visitor profile is developed, we will look at these activity considerations in light of their motivational role as well.

Busch Gardens Williamsburg	42%
Colonial Williamsburg's public areas not requiring a pass	40%
Dining at unique local restaurants	39%
Outlet shopping	36%
Shopping at locally owned stores	34%
Historic Jamestowne	32%
Colonial Williamsburg's ticketed areas	30%
Jamestown Settlement	30%
Museums	25%
Yorktown Battlefield	25%
Williamsburg Pottery	21%
Outdoor recreation (parks, trails, waterways)	20%
Yorktown Riverwalk	19%
Historic Triangle	17%
Yorktown Victory Center	17%
Williamsburg Botanical Gardens	16%
James River Plantations	16%
Ripley's Believe It or Not!	15%
College of William & Mary	15%
Water Country USA	14%
Local breweries	11%
Williamsburg Winery	11%
Go Karts Plus	11%
Great Wolf Lodge	11%
Mini-golf	10%
Art galleries	9%
Go Ape Zip Line and Treetop Adventure	8%
Golf	4%
Eco Discovery Park	4%

Trip Satisfaction

- While the goal of advertising is to generate visitation to the area, it can have an impact beyond this in terms of building expectations and influencing the experience.
- Generally speaking, visitors to Williamsburg expressed high levels of satisfaction with their experience.
- But interestingly, those exposed to the advertising had a significantly higher level of extreme satisfaction with their visit.
- This is another ancillary result of the campaign.



Spending

Lodging	\$ 325
Meals/food/drink/groceries	\$ 213
Attractions	\$ 162
Recreational expenses	\$ 79
Novelties and souvenirs	\$ 94
Entertainment	\$ 84
Transportation in the area	\$ 72
Tours	\$ 79
Other	\$ 52
Total	\$ 1,160

- Ultimately, the goal of the advertising is to generate visitation and spending that results in taxes to the WTC.
- We capture spending by asking respondents for their trip expenditures on a number of specific categories. We have found this to yield a more accurate overall measure than simply asking total spend.
- In total, ad aware visitors spent \$1,160 on their trip to the Williamsburg area.



IMPACT OF THE ADVERTISING

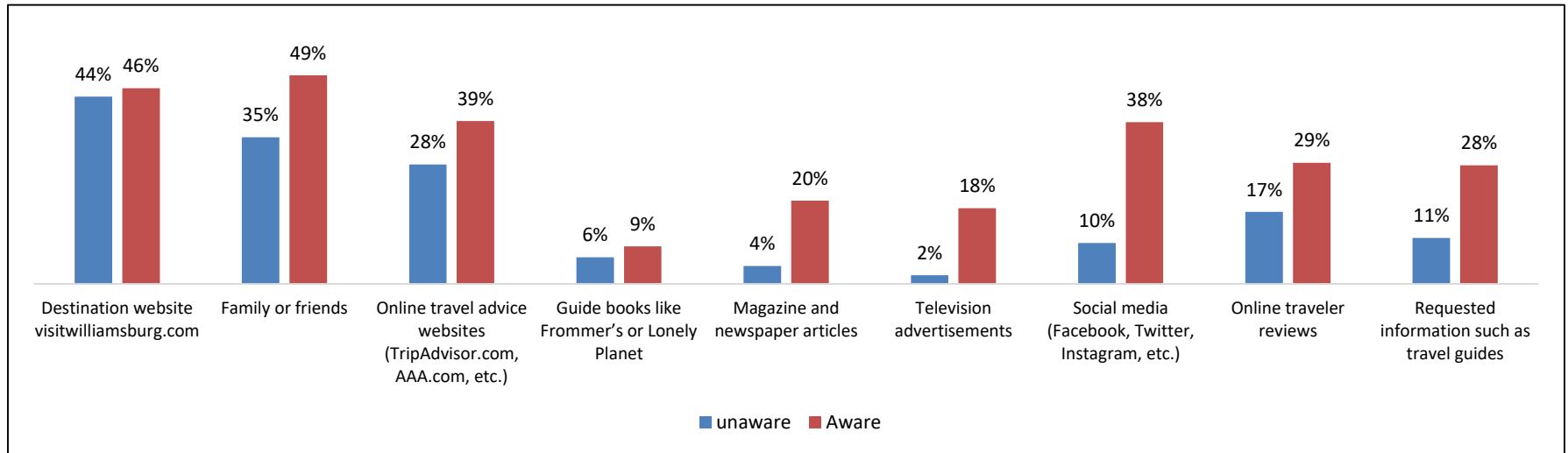
Impact on Image

- While the goal of destination marketing is to generate additional visitation, there are other ways in which the advertising can have influence. This includes improving the image of the place.
- For Williamsburg, those aware of the advertising were significantly more positive about the destination than those who were unaware. Nearly all attributes have significantly higher ratings by those exposed to the marketing.
- The overall direction of this movement is the expectation that there are fun things to do beyond history.

	Aware	Unaware	Difference
Live music	3.62	3.22	0.40
Evening activities	3.82	3.42	0.40
Festivals and events	3.89	3.54	0.35
Shopping	3.93	3.59	0.34
A place you can visit over and over again	4.02	3.69	0.33
Value	3.86	3.53	0.33
Recommend	4.21	3.89	0.32
Recreational activities	3.98	3.68	0.30
An easy/convenient place to get to	4.07	3.78	0.29
Relevant	4.03	3.77	0.27
Local art and handicrafts	3.93	3.66	0.27
Hospitality	4.10	3.84	0.26
Fun	4.19	3.93	0.26
Amenities/attractions	4.08	3.82	0.26
Must-see attractions	4.03	3.77	0.25
Dining	4.09	3.86	0.23
Lodging	4.08	3.85	0.23
Quality of experience	4.10	3.87	0.23
Memorable	4.19	3.97	0.21
Good for kids	4.17	3.95	0.21
Good for adults	4.22	4.03	0.19
Family friendly	4.29	4.14	0.15
Interesting museums	3.99	3.85	0.14
A place to learn	4.19	4.06	0.13
Is crowded	3.49	3.36	0.13
History and entertainment	4.20	4.08	0.12
Nationally known	4.19	4.08	0.11
Experience history	4.32	4.27	0.05
Is expensive	3.44	3.42	0.02
Historic sites	4.26	4.27	-0.01

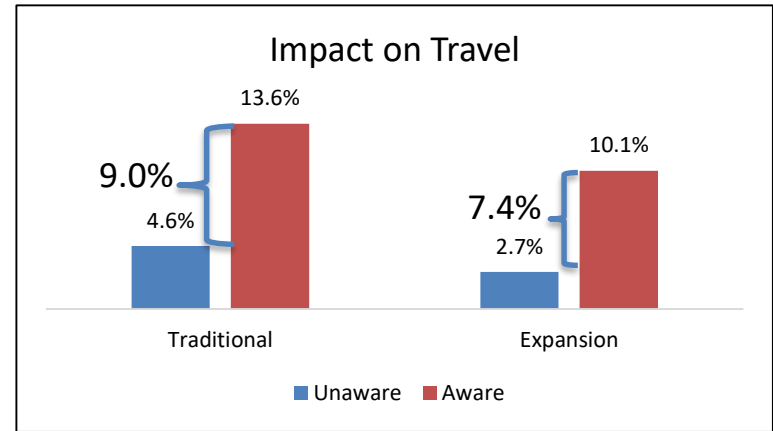
Impact on Information Gathering

- In addition to building the image of Williamsburg, destination marketing can spur consumers to gather information. Given DMOs are shifting more resources into retargeting, this can be a bit deceiving. The extreme differences in information gathering could be a result of a digital ad being delivered after visiting the state's website or Facebook page. Either way, those aware were more engaged with Williamsburg's digital and print collateral.



Impact of the Advertising on Travel

- The methodology used to determine the level of influence is quite conservative in that not all travel, or even all travel from exposed households, is considered influenced. A destination would receive a base rate of travel even without any advertising. Therefore, the rate of travel among unaware households is considered the base. Any travel beyond that base is what is influenced by the marketing. And because of the high levels of repeat visitation to Williamsburg, we are only considering impact on first-time visits.
- The 2019 marketing efforts by WTC helped generated more than 350,000 trips to the area. The rate of travel and larger increment resulted from the traditional markets. Although with a smaller population base in these markets, the expansion markets actually resulted in more total trips.



	Traditional	Expansion	Total
TRAVELING HHS	4,596,315	6,695,850	11,292,165
AWARENESS	40.5%	36.9%	38.4%
AWARE HOUSEHOLDS	1,861,029	2,473,204	4,334,233
INCREMENT	9.0%	7.4%	8%
INCREMENTAL TRIPS	166,904	183,402	350,306

Economic Impact And ROI

- Of the 350,000 influenced trips, there was \$406 million in influenced visitor spending to the destination. SMARInsights' methodology only takes into account trips and spending that would not have occurred without the marketing. Given the marketing investment of \$4.7 million, this results in an \$86 return in influenced visitor spending for every \$1 spent on paid media.
- The traditional markets had a higher rate of visitation and increment as well as a larger trip spend. As a result while these markets accounted for fewer trips, they represent more than half of the incremental spend.
- Economic impact in terms of a tax return to the community can be calculated once a tax rate on this spend is available.

	Traditional	Expansion	TOTAL
INCREMENTAL TRIPS	166,904	183,402	350,306
SPENDING	\$1,242	\$1,083	\$1,160
INCREMENTAL SPEND	\$207,294,244	\$198,624,893	\$405,919,137



APPENDIX

Questionnaire

Greater Williamsburg Chamber & Tourism Alliance
 2019 Advertising Effectiveness Survey Draft
 November 2019
 CW/IL101

Screening questions to identify adult leisure traveler decision-makers in the target markets

Q1. What is your ZIP code? _____

S1. Who in your household is primarily responsible for making decisions concerning travel destinations?
 Me
 My spouse → TERMINATE AFTER SCREENING QUESTIONS
 Jointly with my spouse
 Someone else → TERMINATE AFTER SCREENING QUESTIONS

S2. Please indicate if each of the following applies to you...

[ROTATE]	Yes	No
I regularly use social media like Facebook, Twitter or Instagram		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home TERMINATE AFTER SCREENING QUESTIONS IF NO		
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy		
I use video streaming services like Hulu or Netflix		

S3. What is your age? ____ TERMINATE AFTER SCREENING QUESTIONS IF < 18

S4. Approximately how many leisure trips have you taken in the last year? _____

S5. Overall, including all of your leisure trips, approximately how many nights did you spend away from home on leisure trips this year? _____

Questions to assess the competitive situation

Q1. Please indicate how familiar you are with each of the following destinations in terms of what they have to offer as a place to visit on a leisure or non-business trip.

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
Williamsburg, VA, area – including Colonial Williamsburg, Busch Gardens, Williamsburg shopping centers/ outlets, Jamestown, Yorktown				
Orlando, FL, area – including Disney, Universal Studios, and other theme parks, as well as Kissimmee				
Asheville, NC, area – including the Biltmore Estate and Grove Park Inn				
Washington, DC, area – including the Smithsonian museums, National Zoo, Capitol Hill, Georgetown University				
Hershey, PA – including The Boardwalk at Hersheypark				
Annapolis, MD				

Q2. How would you rate each of these destinations as a place to visit for a leisure trip?

[ROTATE]	Poor	Fair	Good	Very good	Excellent	Don't know
Williamsburg, VA, area – including Colonial Williamsburg, Busch Gardens, Williamsburg shopping centers/ outlets, Jamestown, Yorktown						
Orlando, FL, area – including Disney, Universal Studios, and other theme parks, as well as Kissimmee						
Asheville, NC, area – including the Biltmore Estate and Grove Park Inn						
Washington, DC, area – including the Smithsonian museums, National Zoo, Capitol Hill, Georgetown University						
Hershey, PA – including The Boardwalk at Hersheypark						
Annapolis, MD						

Q2a. Have you recently gathered any information about leisure travel to each of these places?

[ROTATE]	No	Yes
Williamsburg, VA, area – including Colonial Williamsburg, Busch Gardens, Williamsburg shopping centers/ outlets, Jamestown, Yorktown		
Orlando, FL, area – including Disney, Universal Studios, and other theme parks, as well as Kissimmee		
Asheville, NC, area – including the Biltmore Estate and Grove Park Inn		
Washington, DC, area – including the Smithsonian museums, National Zoo, Capitol Hill, Georgetown University		
Hershey, PA – including The Boardwalk at Hersheypark		
Annapolis, MD		

Q3series. Please tell us about your past leisure travel to the following places.

[ROTATE]	Q3a. Which of the following places have you ever visited for a leisure trip?	Q3b. How many trips have you taken to this place [ALLOW ONLY IF EVER VISITED]	Q3c. Which of these have you visited in the past year? [ALLOW ONLY IF EVER VISITED]
Williamsburg, VA, area – including Colonial Williamsburg, Busch Gardens, Williamsburg shopping centers/ outlets, Jamestown, Yorktown			
Orlando, FL, area – including Disney, Universal Studios, and other theme parks, as well as Kissimmee			
Asheville, NC, area – including the Biltmore Estate and Grove Park Inn			
Washington, DC, area – including the Smithsonian museums, National Zoo, Capitol Hill, Georgetown University			
Hershey, PA – including The Boardwalk at Hersheypark			
Annapolis, MD			

Q4. How likely are you to visit the following places for a leisure trip in the next year?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
Williamsburg, VA, area – including Colonial Williamsburg, Busch Gardens, Williamsburg shopping centers/ outlets, Jamestown, Yorktown					
Orlando, FL, area – including Disney, Universal Studios, and other theme parks, as well as Kissimmee					
Asheville, NC, area – including the Biltmore Estate and Grove Park Inn					
Washington, DC, area – including the Smithsonian museums, National Zoo, Capitol Hill, Georgetown University					
Hershey, PA – including The Boardwalk at Hersheypark					
Annapolis, MD					

Questionnaire

ASK Q5 AND Q6 FOR WILLIAMSBURG IF AT LEAST NOT VERY FAMILIAR FROM Q1. ALSO ASK OF ONE COMPETITOR OF MOST SIMILAR FAMILIARITY.

Q5. Please rate DESTINATION in each of the following areas:

ROTATE	1 Poor	2	3	4	5 Excellent
Hospitality					
Value for the money					
Festivals and events					
Historic sites and landmarks					
Shopping					
The combination of history and entertainment					
Variety of recreational activities					
Quality of experience					
Evening activities					
Variety of local art and handicrafts					
Live music and concerts					
Family friendly					
Must-see attractions					

Q6. Please tell us how much you agree with each of the following statements about DESTINATION:

ROTATE	1 Disagree completely	2	3	4	5 Agree completely
Is a good place for adults					
An experience that is relevant to me					
Is a good place for kids					
Provides a memorable experience with my family					
A fun place to visit					
An easy/convenient place to get to					
Interesting museums					
Offers restaurants and dining options that meet my needs					
A place to learn and discover new things					
Has amenities/attractions that I'm interested in					
Is a good place to experience history					
Is expensive					
Is crowded					
Offers lodging options that meet my needs					
A place I would recommend to friends/family					
A place you can visit over and over again					
Nationally known attractions					

Questions about Williamsburg trips

IF VISITED WILLIAMSBURG IN THE PAST YEAR FROM Q3B ASK Q8-Q21 ABOUT THEIR TRIP. OTHERWISE SKIP TO AD AWARENESS.

Now, please give us some information about the leisure trip(s) you took in the past year to Williamsburg, VA, area – including Colonial Williamsburg, Busch Gardens, Williamsburg shopping centers/ outlets, Jamestown, Yorktown.

Q8. What month(s) did you visit the Williamsburg, VA, area? Select all that apply.

- December 2018
- January 2019
- February 2019
- March 2019
- April 2019
- May 2019
- June 2019
- July 2019
- August 2019
- September 2019
- October 2019
- November 2019
- December 2019

Q9. In the course of planning your trip(s) to the Williamsburg, VA, area, did you gather information from any of the following? Select all that apply.

ROTATE	
Destination website visitwilliamsburg.com	
Family or friends	
Online travel advice websites (TripAdvisor.com, AAA.com, etc.)	
Guide books like Frommer's or Lonely Planet	
Magazine and newspaper articles	
Television advertisements	
Social media (Facebook, Twitter, Instagram, etc.)	
Online traveler reviews	
Requested information such as travel guides	
Other, please specify	
Did not gather information	

This next group of questions will be about your **most recent** trip to the Williamsburg, VA, area.

Q10. How satisfied were you overall with your experience in the Williamsburg, VA, area?

- Extremely satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied

Q11. How far in advance did you **begin to plan** this trip?

- Less than a week
- One to two weeks
- Three to four weeks
- More than one month to three months
- More than three months to six months
- More than six months
- Don't know

Q12. Including yourself, how many people were on this trip? _____

IF Q12 > 1, ASK Q13

Q13. How many children under the age of 18 years old were in your travel party? _____

Q14. How many days did you spend in the Williamsburg, VA, area? _____

Q15. What type of lodging did you use?

- Rental house/VRBO/Airbnb
- Hotel/motel/resort
- Bed and breakfast
- Timeshare I own
- Timeshare I rented
- With family/friends
- Campground/RV park
- Other, please specify _____
- Not sure/don't remember
- Did not stay overnight in the Williamsburg area

Q16. Which of the following attractions and activities did you visit or do as part of your most recent trip? Select all that apply. [ROTATE]

- Historic Triangle
- Colonial Williamsburg's public areas not requiring a pass, such as Merchant Square, Duke of Gloucester Street, etc.
- Colonial Williamsburg's ticketed areas such as the entrance to the Governor's Palace, the Capitol building and craft shops
- Jamestown Settlement (Museum and recreation areas: fort, three ships, and Indian village)
- Yorktown Battlefield (part of Colonial National Historical Park)
- Yorktown Victory Center (Museum and recreation areas: Continental Army encampment and 1780's farm)
- Busch Gardens Williamsburg
- College of William & Mary
- Water Country USA
- Historic Jamestowne (original National Park and Preservation Virginia site on island with archaeological dig, glassblowing, visitor center, and Archaearium)
- Great Wolf Lodge
- Williamsburg Winery
- Local breweries
- Yorktown Riverwalk (including Schooner Alliance, Patriot Segway Tours, Waterman's Museum)
- Williamsburg Postery
- Eco Discovery Park
- Go Ape Zip Line and Treetop Adventure
- Williamsburg Botanical Gardens
- Go Karts Plus
- James River Plantations
- Ripley's Believe It or Not!
- Art galleries
- Dining at unique local restaurants
- Outlet shopping
- Shopping at locally owned stores
- Museums
- Golf
- Mini-golf
- Outdoor recreation (parks, trails, waterways)

Questionnaire

ONLY SHOW THE ACTIVITIES THEY CHOSE IN Q24 AND ASK:

Q18. Of these activities/attractions, please indicate if there were any that were a major influence when you selected the destination for this trip. You may choose up to 3.

Q21. To better understand the economic impact of tourism, we are interested in finding out the approximate amount of money you and other members of your travel party spent on your trip to the Williamsburg, VA, area. Please estimate how much your travel party spent in total on...

- Lodging _____
- Meals/food/drink/groceries _____
- Attractions _____
- Recreational expenses such as boat rental, golf fees, etc. _____
- Novelties and souvenirs _____
- Entertainment such as admission fees to events or shows _____
- Transportation in the area _____
- Tours _____
- Other _____

Ad Awareness Section

SHOW ON SEPARATE PAGE:

Now we are going to show you some various forms of advertising. We would like you to take a few moments to review the ads and answer the corresponding questions.

ROTATE THREE VIDEOS

FUN_YoungFamilies_15_1920x1080.mp4



-374977051

9891_WTC_FUN_SBT0_All_Around_Fun_Too_1920x1080.mp4



- 374977448

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9891_WTC_FUN_SST0_Outdoor_Adventure_1920x1080.mp4



- 374977692

Q21a. Have you seen this ad before?

- Yes
- No

SHOW ALL ADS ON ONE SCREEN AND ASK INDIVIDUAL AWARENESS



#1



#2



#3



#4



#5



#6



#7



#8



#9

Q22. Have you seen this ad before?

- Yes
- No

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SHOW ALL ADS ON ONE SCREEN AND ASK INDIVIDUAL AWARENESS



Q23. Have you seen this ad before?

- Yes
- No

Ad Ratings Section

Q26. Now please think about **ALL** of the advertising that you just saw. What is your overall reaction to these ads?

Very unfavorable	Unfavorable	Neutral	Favorable	Very favorable
1	2	3	4	5

Q27. Again, please think about **ALL** of the advertising that you just saw. Please indicate how much you agree that these ads...

ROTATE	1 Disagree Strongly	2	3	4	5 Agree Strongly
Make Williamsburg look like a good place for a family trip					
Show experiences unique to Williamsburg					
Make Williamsburg look like a fun destination					
Show unexpected Williamsburg attractions and activities					
Show a place with a rich history					
Make Williamsburg seem exciting					

Q28. Please indicate how much you agree that these ads...

	1 Disagree strongly	2	3	4	5 Agree strongly
Make me want to learn more about things to see and do in Williamsburg					
Make me want to visit Williamsburg for a leisure trip					

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Questionnaire

Demographics Section

The following questions are for classification purposes only so that your responses may be grouped with those of others.

DO NOT FORCE DEMOS

Marital. Are you currently...?

- Married/With partner
- Single (never married)
- Divorced
- Widowed

Household. Including yourself, how many people are currently living in your household? ____

ASK KIDS IF HOUSEHOLD > 1

Kids. How many children under the age of 18 live in your household? ____

Education. Which of the following categories represents the last grade of school you completed?

- Some high school
- High school graduate
- Some college or 2-year college degree
- 4-year college degree
- Graduate studies or graduate degree

Income. Which of the following categories best represents the total annual income for your household before taxes?

- Less than \$30,000
- \$30,000-\$39,999
- \$40,000-\$49,999
- \$50,000 - \$59,999
- \$60,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 - \$124,999
- \$125,000 - \$149,999
- \$150,000 or more

Gender. Do you identify as...?

- Male
- Female

Ethnicity. What is your race/ethnicity?

- White
- Black/African American
- Asian
- Native Hawaiian/Pacific Islander
- American Indian/Native Alaskan
- Two or more

Employment. Which of the following best describes your employment status?

- Employed, full time
- Employed, part time
- Self-employed
- Student
- Retired
- Not employed
- Prefer not to answer