

# 2020 Image & Ad Effectiveness & ROI Research

March 2021

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The 2020 advertising campaign was quite successful despite operating during a pandemic that wreaked havoc on leisure travel. Key insights from this research include:

- While the pandemic initially halted leisure travel, many consumers ultimately traveled in ways that made them feel comfortable. And the level of comfort has improved since the vaccine has been widely distributed and new cases are declining.
- Overall, the 2020 advertising reached 46% of target households, or 4.4 million.
- Ad awareness grew from 45% in 2019 to 47% in 2020, aided by the 2020 social advertising generating higher awareness than the 2019 print advertising.
- The percentage of consumers aware of ads in all three media increased in 2020, which bodes well for a campaign operating in a challenging travel environment – as exposure to ads at various levels of the travel funnel reliably boosts impact.
- Consumer reaction to the 2020 advertising is generally strong. The advertising excels at communicating that Williamsburg is *a good place for a family trip, a fun destination, a place with rich history, and a place that is open for tourism now*. The advertising also effectively generates interest in travel to the Williamsburg area from an evaluative ratings standpoint.
- Young families with kids and the “See-ers & Do-ers” persona have relatively high ad awareness and a relatively strong reaction to the creative. Reaching the most receptive audience was an indication that the ads would ultimately influence travel even in the challenging pandemic environment.
- The 2020 advertising ultimately influenced about 175,000 trips to the Williamsburg area, resulting in \$196 million in visitor spending and a return of \$27 in visitor spending for each \$1 invested in the media buy.
- Exposing consumers to ads in multiple media is what drove the influenced Williamsburg travel. Generating overlap continues to be critical and should be a strategic goal when developing the media plan.
- The advertising not only influenced the decision to visit the Williamsburg area, but it also gave visitors ideas of things to do – leading to longer, more active and better trips with higher spending.
- The advertising has also helped Williamsburg to improve its position in the competitive set.

# Background & Objectives

- The Williamsburg Tourism Council (WTC) is responsible for encouraging travel to the area including the use of paid promotional efforts.
- As part of these efforts, WTC ran the “Life.at your pace” advertising campaign from June 2020 through December 2020.
- In order to be accountable for the resources invested in these efforts, WTC has retained Strategic Marketing & Research Insights (SMARInsights) to measure the reach and impact of its marketing.
- Of course, this advertising ran during the COVID-19 pandemic, which has had a profoundly negative impact on leisure travel.
- The specific objectives of this research are to:
  - Assess the impact of COVID-19 on consumer perceptions and travel behaviors
  - Review the competitive environment
  - Gauge advertising awareness
  - Examine consumer reaction to the creative
  - Evaluate advertising impact

# Methodology

- Data were collected via an online survey so that consumers could review the actual advertising.
- A total of 1,903 online surveys were completed between February 11 and 23, 2021.
- The research was conducted among leisure travelers in the proven and expansion markets. Leisure travelers are those who normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home.
- The overall results are weighted to be representative of market population.
- It should also be noted here that year-over-year changes are reviewed using comparable Proven markets to allow for a direct comparison (Cleveland and Columbus were not target markets in 2019, so no comparison is available).

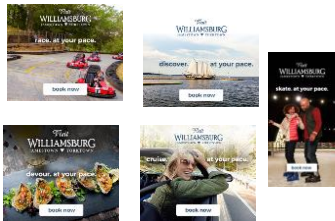
Proven Markets (Short Drive, Established Success, Heaviest Volume)	Surveys
DC	322
Charlottesville + Harrisonburg, VA	54
Roanoke-Lynchburg	102
Charlotte	209
Philadelphia	322
Baltimore	208
Raleigh-Durham	107
Salisbury, MD	65
Greenville-New Bern-Washington, NC	101
Expansion Markets (Flight Markets & Large Scale)	Surveys
Cleveland	258
Columbus, OH	155

# 2020 Campaign Overview

- The “Life.at your pace” campaign was selected through qualitative and quantitative testing.
- The 2020 “Life.at your pace” campaign included linear TV/CTV, digital banner, social, and influencer content advertising. The digital banner and social ads included summer, fall, and holiday executions.
- Samples of the ads are shown below. The entire collection of ads tested can be found in the questionnaire in the Appendix.
- WTC invested \$7.3 million in this 2020 advertising – a significantly larger investment than the \$4.7 million spent in 2019.

Medium	2019 Campaign	2020 Campaign
Linear TV/CTV	\$2,020,000	\$3,259,855
Digital Banner	\$2,375,960	\$3,361,370
Social	\$0 (none tested)	\$285,257
Influencer Content	\$0 (none tested)	\$354,851
Print	\$349,605	\$0
<b>Total</b>	<b>\$4,745,565</b>	<b>\$7,261,333</b>

Sample Banner Ads



Sample Social Ads



Culture Questors Video Ad



See-ers & Do-ers Video Ad



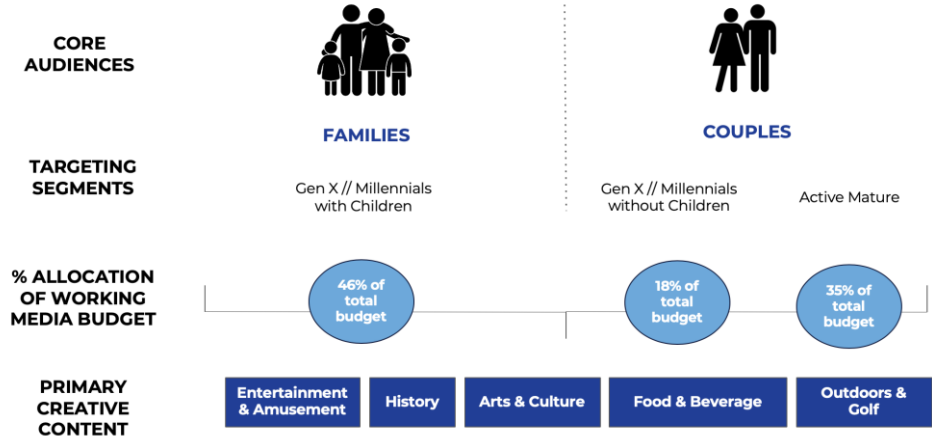
Simple Strivers Video Ad



# Demographic Targets

- WTC has defined demographic targets for the 2020 advertising.
- These targets are defined in the graphic.
- The research results are reviewed by demographic target where applicable.

## TARGET AUDIENCE SEGMENTATION & ALLOCATION



# Personas

- WTC has also defined target personas. Rooted in motivational attitudes and mindsets rather than demographic measures, personas allow for a customized narrative.
- WTC has identified and targeted Culture Questors, Simple Strivers, and See-ers & Do-ers personas. The color-coded table shows their attitudinal skews.
- The research results are reviewed by persona where applicable.

Above average agreement
Average agreement
Below average agreement

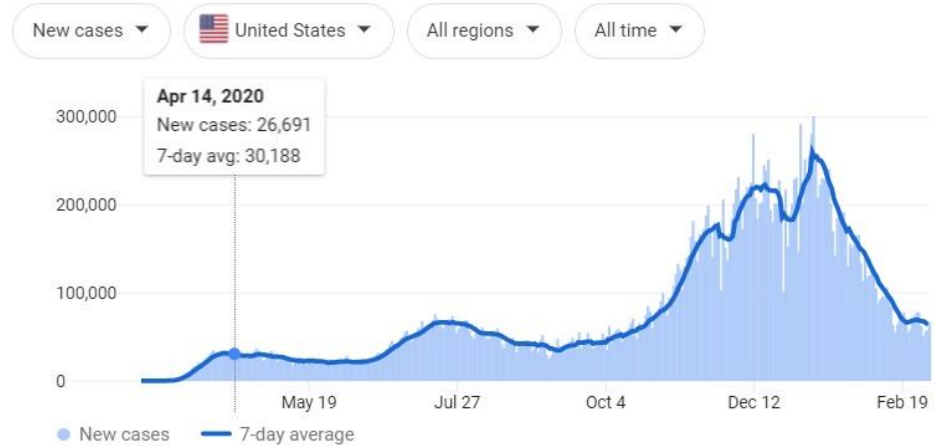
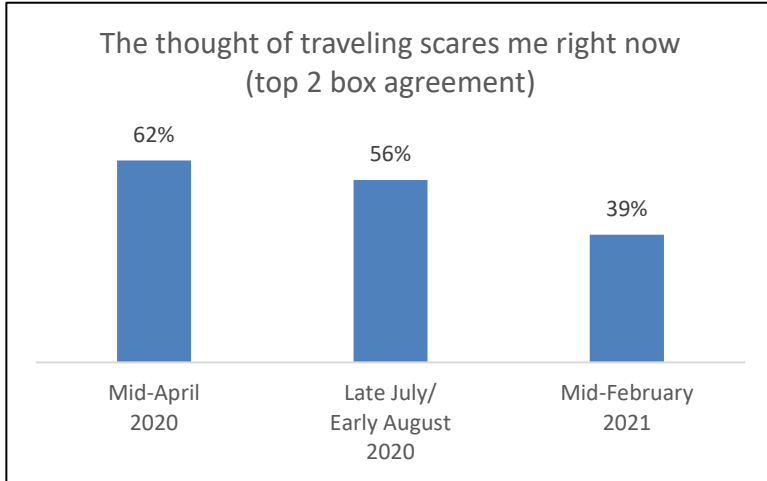
Persona Statements	Culture Questors	Simple Strivers	See-ers & Do-ers
On my vacations, I like to visit places I'm familiar with	Below average agreement	Above average agreement	Average agreement
My trips usually include visits to museums and historic sites	Above average agreement	Below average agreement	Average agreement
Vacations should maximize the amount of things you see and do	Average agreement	Below average agreement	Above average agreement
Leisure travel should be relaxing and easy to both plan and enjoy	Average agreement	Above average agreement	Below average agreement
I like to experience the arts and culture of the places I visit	Above average agreement	Below average agreement	Average agreement
We do so much on our trips that I need to rest when I return	Average agreement	Below average agreement	Above average agreement
I like to visit places that are easy to get to and to get around in	Below average agreement	Above average agreement	Average agreement
I think that travel is an opportunity to learn	Above average agreement	Below average agreement	Average agreement
I value experiences over getting the best price	Above average agreement	Below average agreement	Average agreement



# COVID-19 PERCEPTIONS

The first section of this report reviews the results from the COVID-19-related questions. The key insight is that consumers are growing more comfortable with the idea of leisure travel and are increasingly ready to travel as the vaccine is being widely distributed and proving effective.

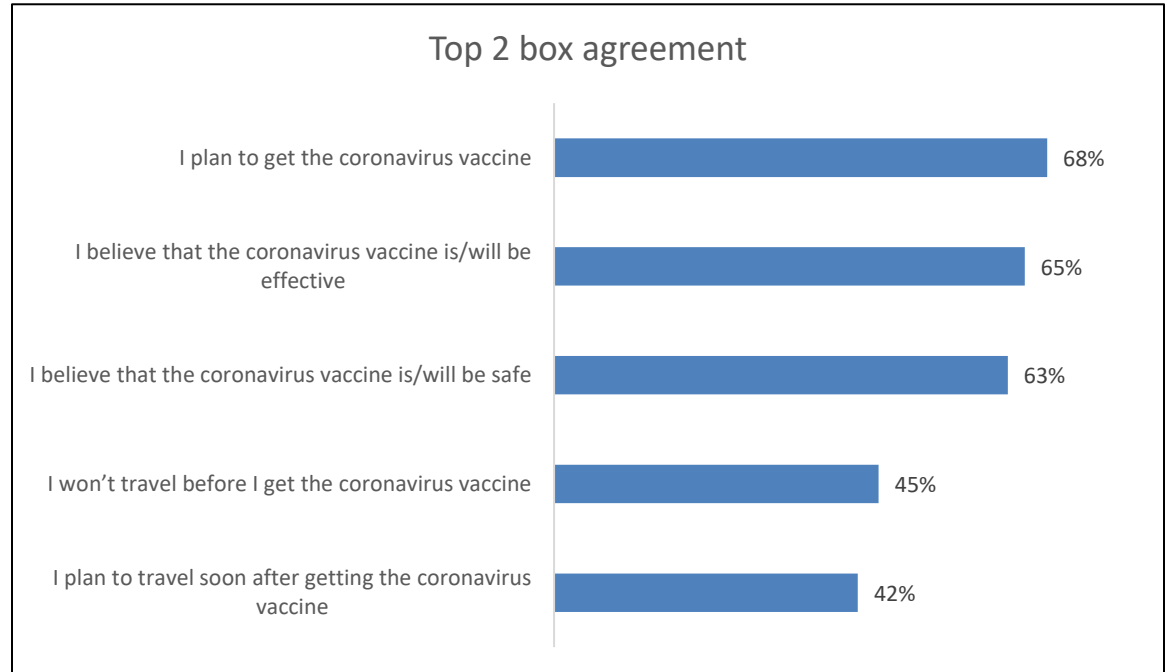
# Consumer Perceptions Change



- Consumers are growing more comfortable with travel as the COVID-19 vaccine is being widely distributed and proving effective – and new cases are declining.

# Vaccine Perceptions

- Around two-thirds of consumers plan to get the vaccine and feel it will be safe and effective.
- And travel plans are tied to the vaccine for more than 4 in 10 consumers.



# Leisure Travel Readiness

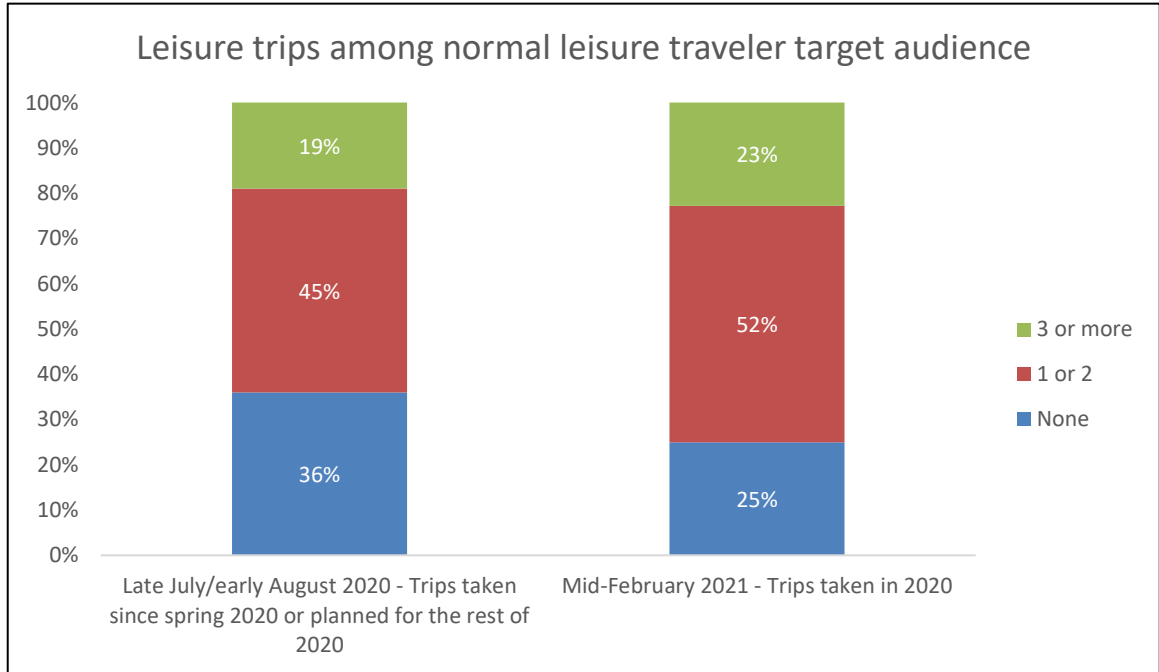
Considering the COVID-19 pandemic, which of the following best describes how you feel about traveling for leisure soon?

- Travel readiness and pent-up demand is evidenced by the fact that only 1 in 5 consumers think it's too early to be thinking about leisure travel.
- About half are still dreaming/ready to plan, but 1 in 5 are currently planning.



# COVID-19 Impact on Leisure Travel

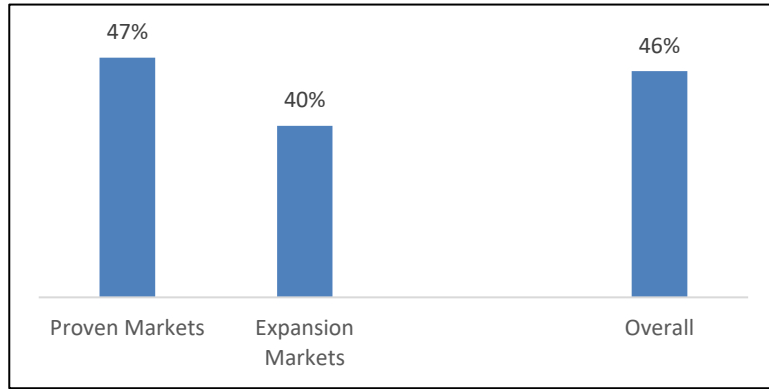
- In late July/early August, 36% of consumers indicated that they had not taken a trip nor had plans to travel for the rest of the year.
- As of mid-February, only 25% indicated taking no trips in 2020.
- So, more ultimately took trips in 2020 than had taken/planned in the middle of the year.



# ADVERTISING AWARENESS

This section reviews awareness of the 2020 advertising overall, by medium, by market, by ad, and by target groups.

# 2020 Campaign Awareness

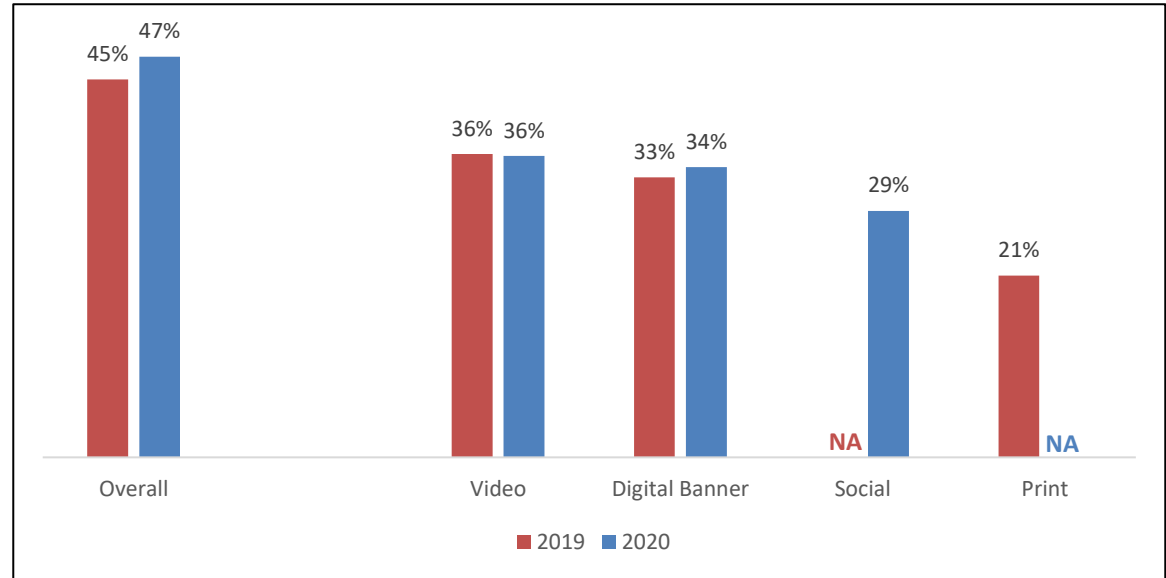


	Proven Markets	Expansion Markets	Overall
Target HHs	7,761,679	1,887,366	9,649,045
Awareness	47%	40%	46%
Aware HHs	3,668,474	745,587	4,414,060

- Overall, the 2020 advertising reached 46% of target households, or 4.4 million.
- Awareness is higher in the more populous proven markets. These markets account for 80% of target households and 83% of ad-aware households.

# Awareness Change

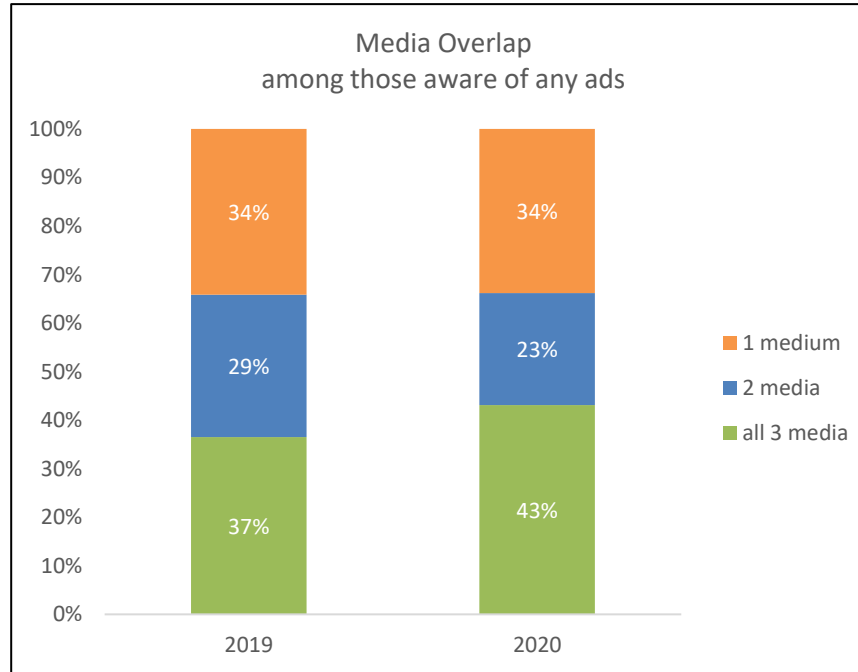
- The change in awareness results are reviewed among only the comparable markets to allow a direct comparison.
- Overall awareness grew from 45% last year to 47% this year, aided by the 2020 social advertising generating higher awareness than the 2019 print advertising.





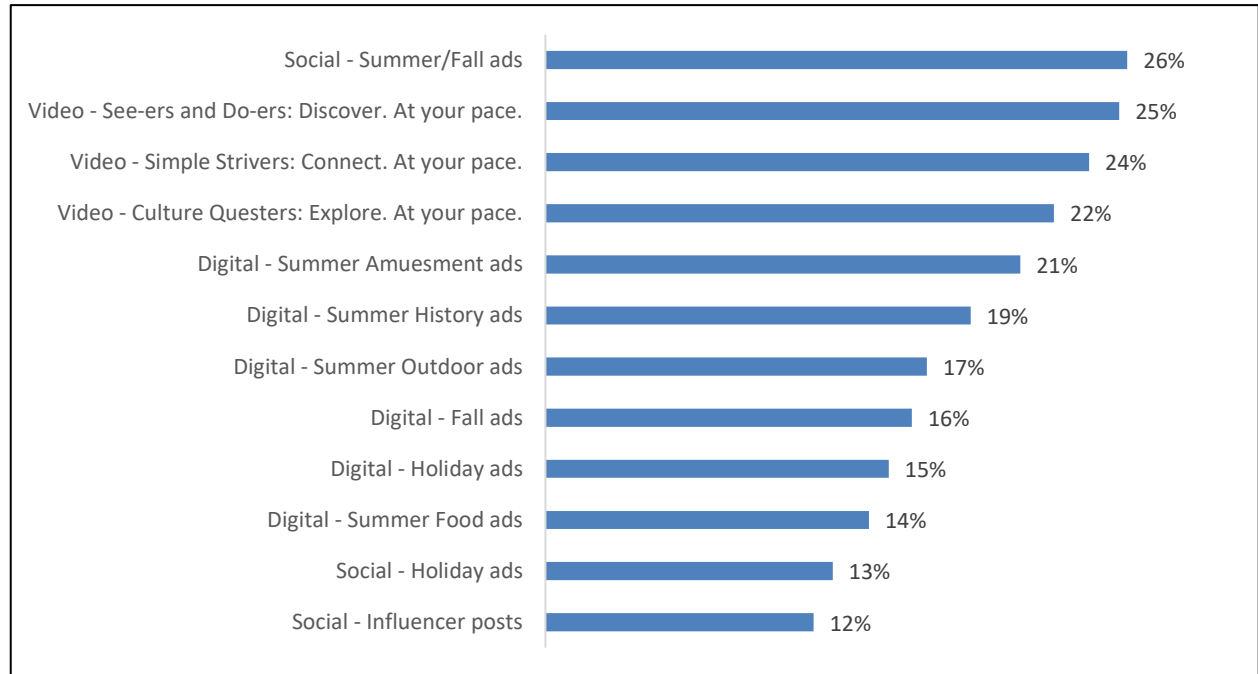
# Media Overlap Change

- Generating media overlap (awareness of ads in multiple media) has typically proven to boost impact. Each medium plays a different role in the various phases of the decision funnel. The impact of media overlap is reviewed later in this report. Here we look at the level of overlap achieved compared to the prior year (again, in the comparable proven markets).
- The percentage of consumers aware of ads in all three media increased in 2020, which bodes well for a campaign operating in a challenging travel environment.



# 2020 Individual Ad Awareness

- A review of individual ad recall reveals that the video ads have relatively high awareness.
- It is also interesting to note that the summer/fall social ads have the highest awareness (shown below) given relatively low awareness of the other social ads. This result should be examined considering media weighting, but it is likely driven to some degree by similarity of imagery used in other ads/media.

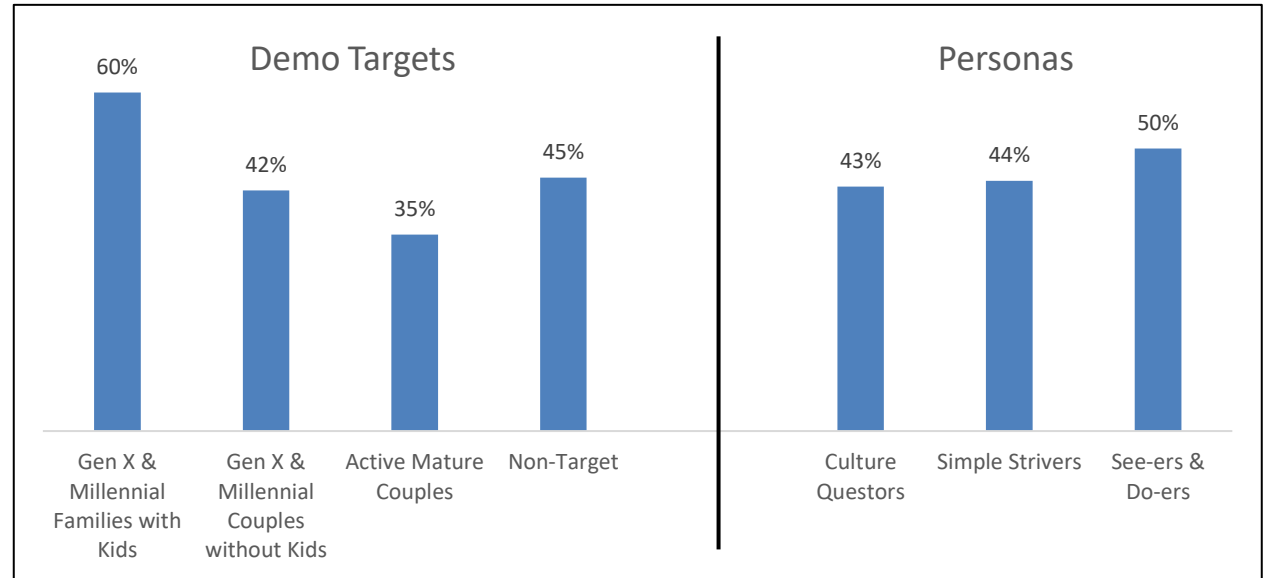


### Summer/Fall Social Ads



# Summer 2020 Campaign Awareness by Groups

- Of the four demographic targets, the young families have markedly higher awareness.
- The difference is less drastic across the personas, although the See-ers & Do-ers do stand out for their elevated levels of recall.

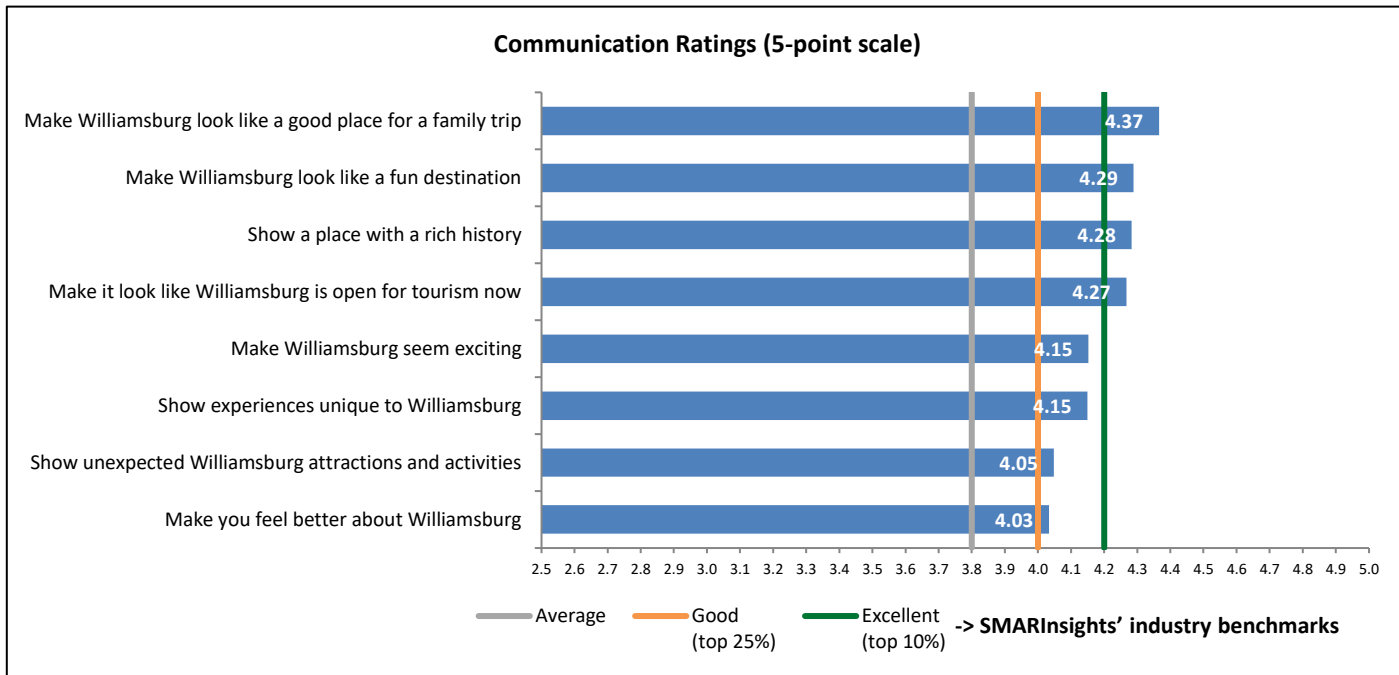


# CREATIVE EVALUATION

This section reviews consumer reaction to the advertising campaign with comparisons to SMARInsights' industry benchmarks and to past Williamsburg ad ratings. The results are also split by market and target groups to highlight messaging strategy opportunities.

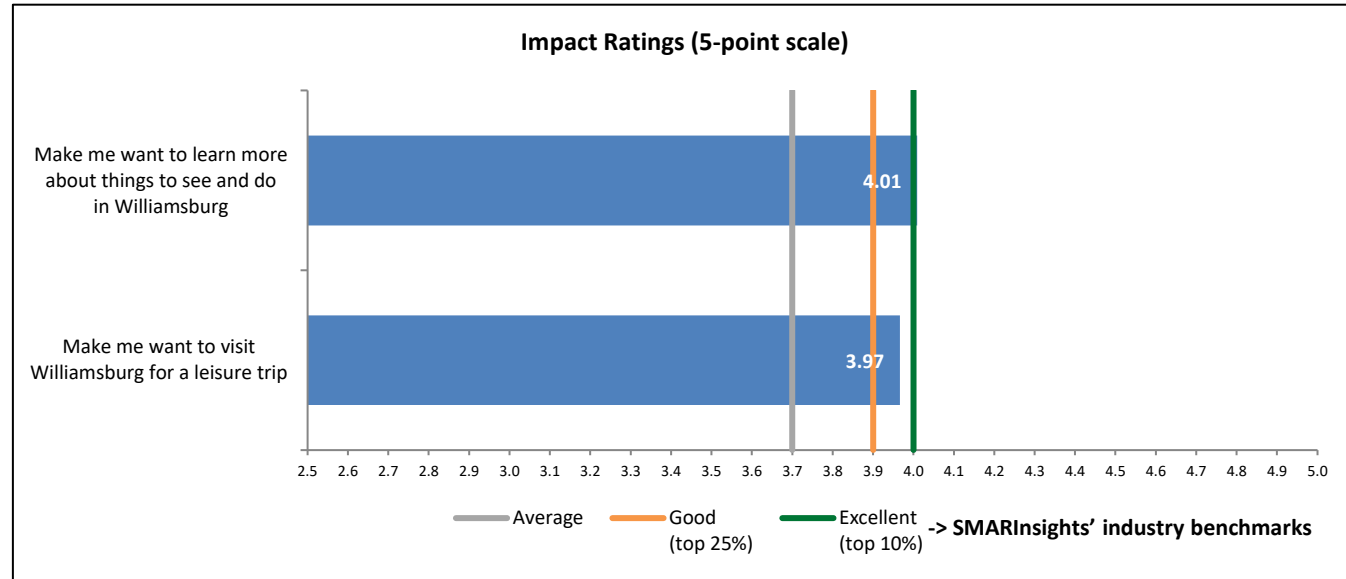
# 2020 Advertising Communication Ratings

- The 2020 advertising excels at communicating that Williamsburg is *a good place for a family trip, a fun destination, a place with rich history, and a place that is open for tourism now.*



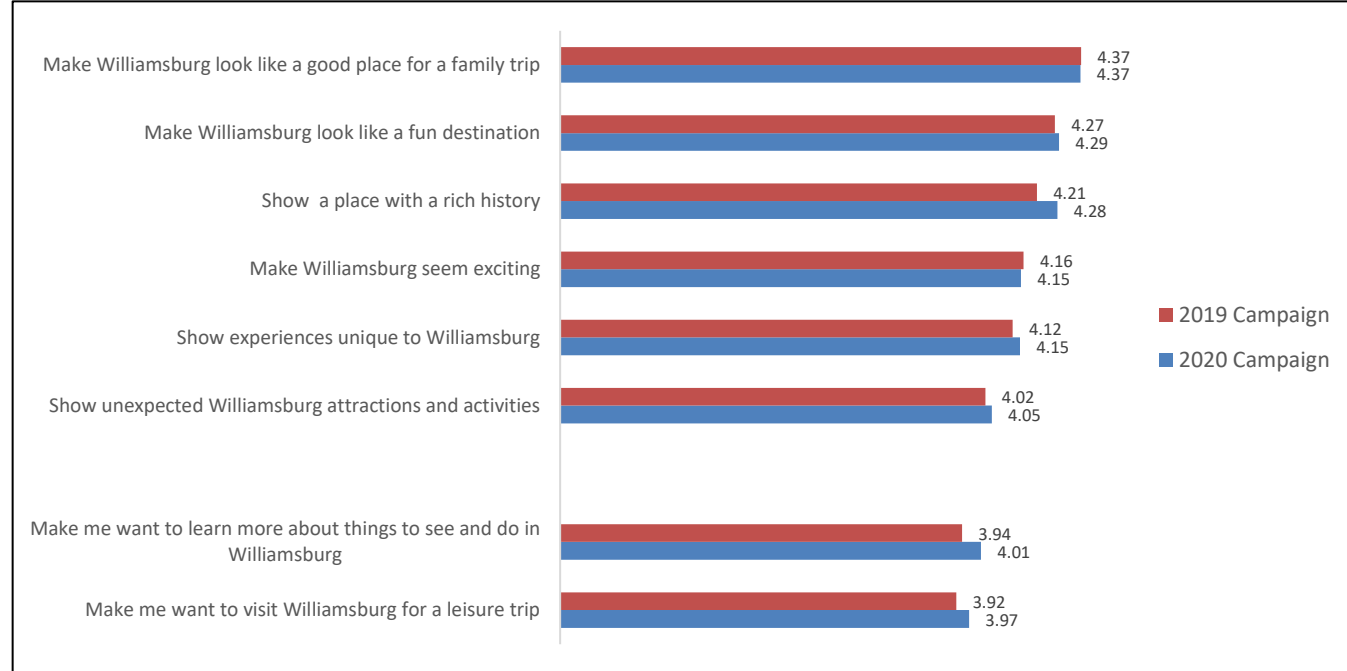
# 2020 Advertising Impact Ratings

- From an industry ad ratings benchmark standpoint, the 2020 advertising effectively generates interest in Williamsburg travel.



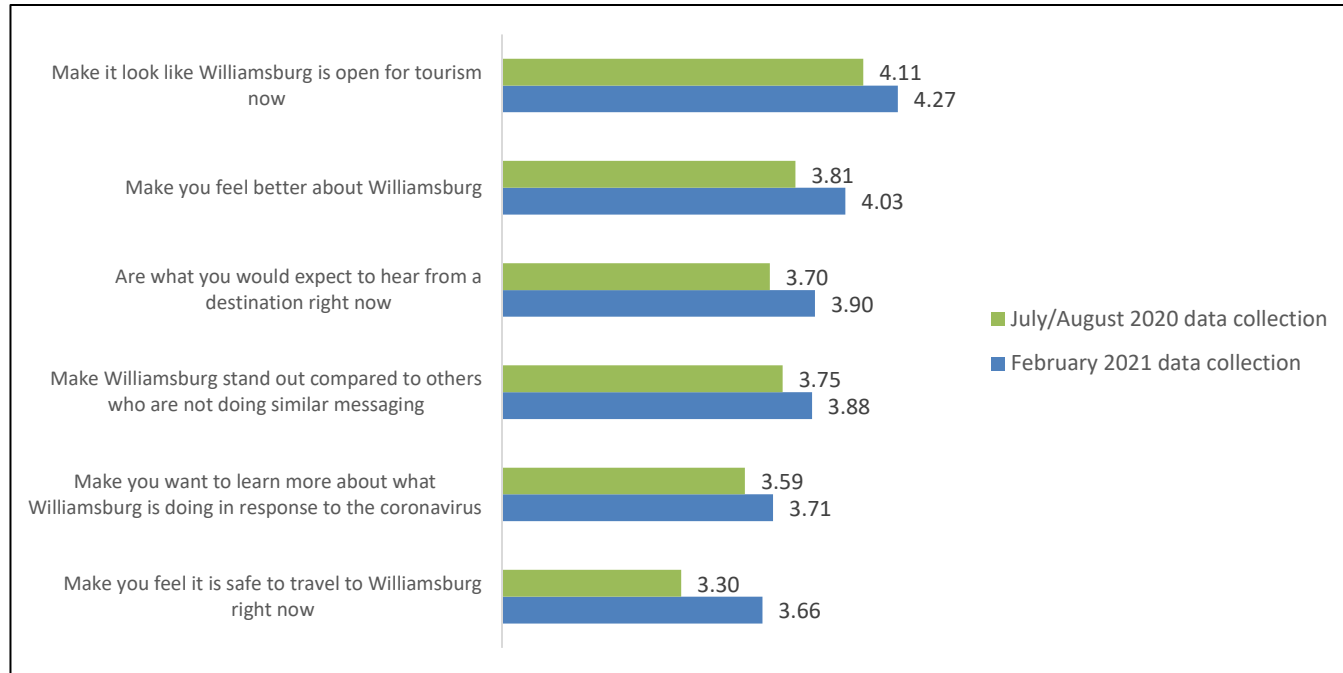
# Ad Ratings Change

- Using a comparable set of markets to allow for a direct comparison, we see that the 2020 ad ratings are above the 2019 ratings in several instances despite the challenging context of the pandemic – a testament to the strength of the new campaign.



# Ad Ratings Change (COVID Attributes)

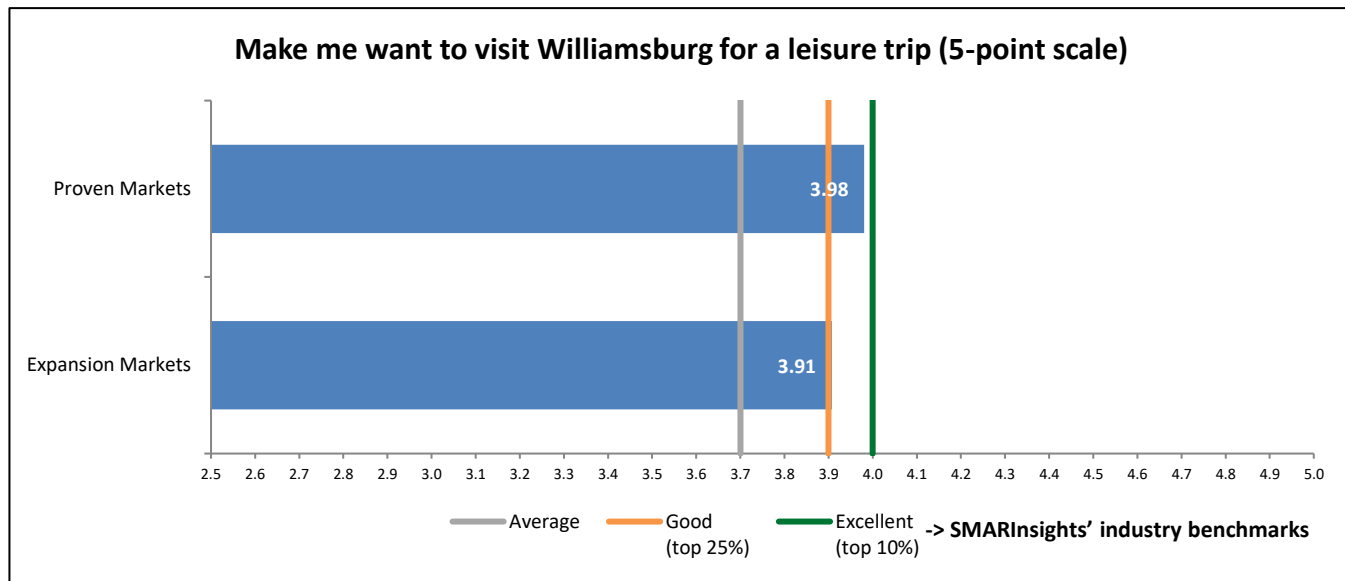
- The ad ratings for attributes relating directly to COVID-19 improved compared to summer likely due to more positive consumer sentiment.





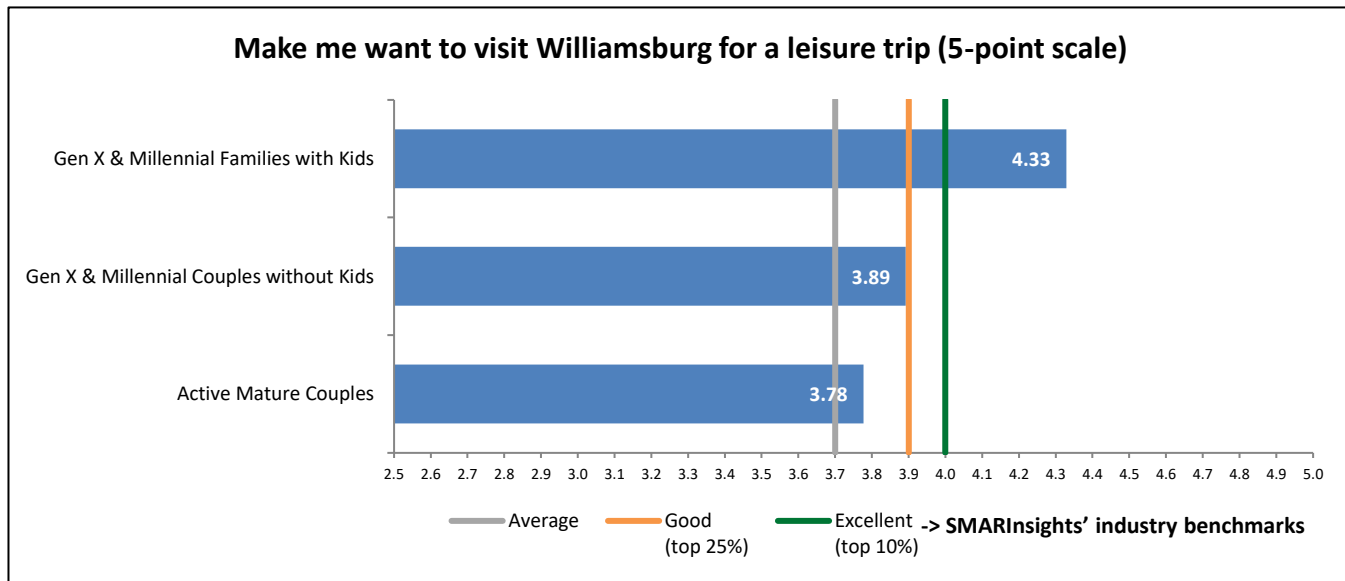
# 2020 Ads Make Me Want to Visit by Market Type

- The advertising is working to generate interest in visiting travel in both market groups. The rating in the proven markets is just shy of the “excellent” threshold.



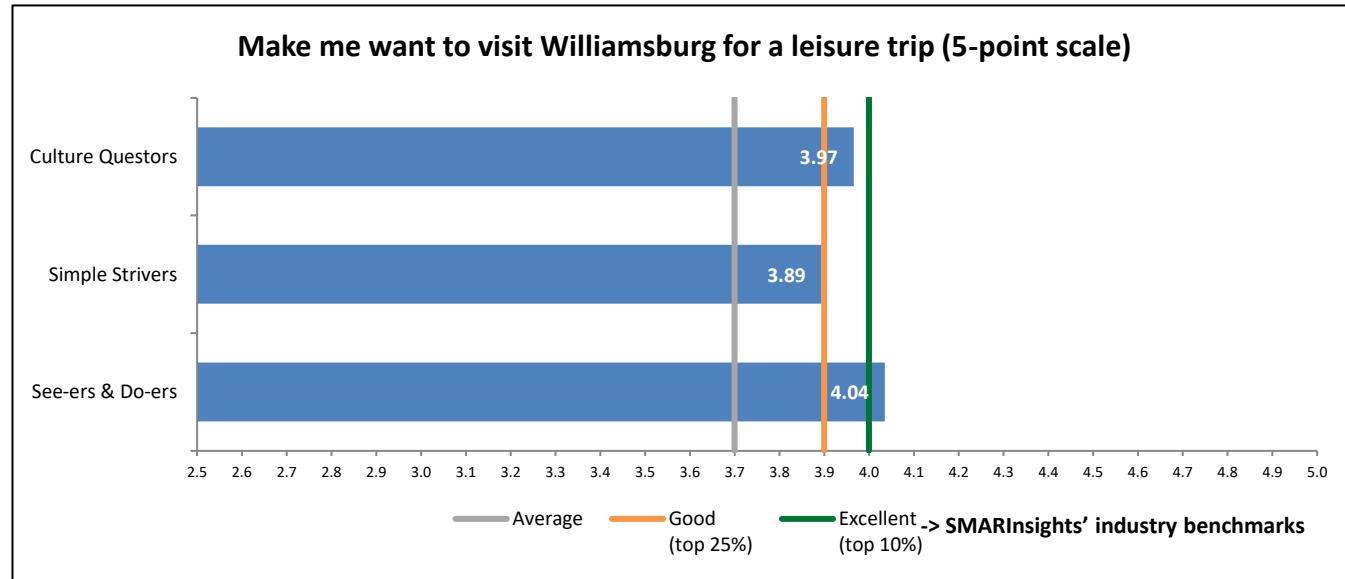
# 2020 Ads Make Me Want to Visit by Target Audience

- Recall that the young families demographic group had relatively high ad awareness. Here we see that they are also relatively receptive to the advertising from this evaluative ratings perspective. Reaching the most receptive audience foreshadows strong advertising impact on travel.



# 2020 Ads Make Me Want to Visit by Persona

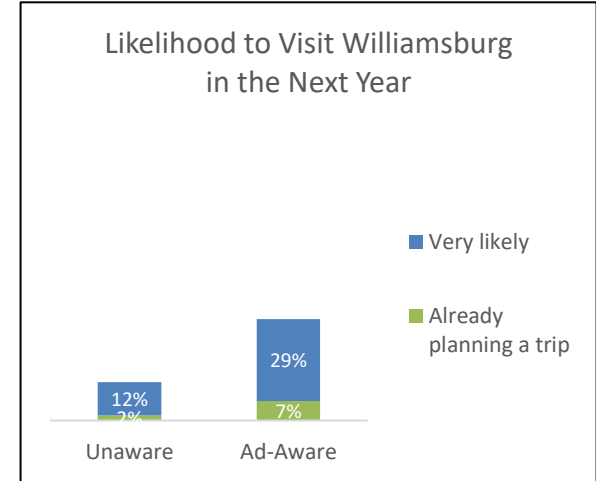
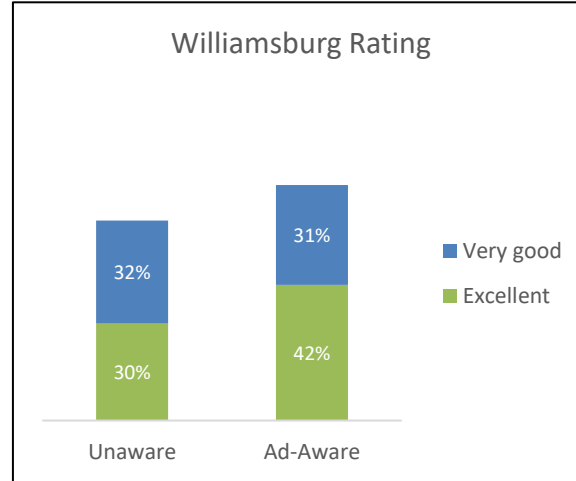
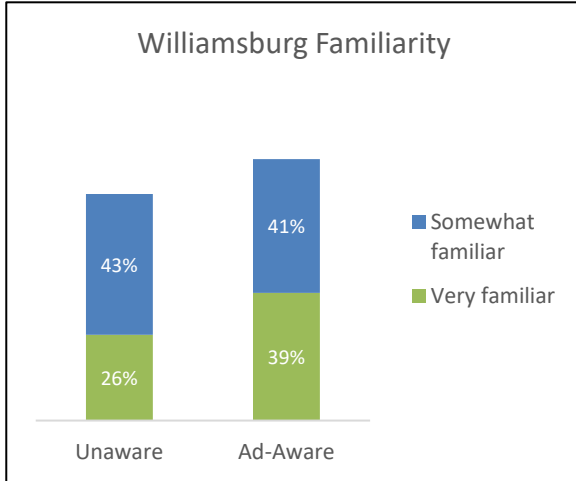
- Of the personas, the See-ers & Do-ers give the ads the strongest rating in terms of generating interest in visiting. This persona also had relatively high ad awareness – again suggesting that the ads are reaching the most receptive consumers and will influence travel.



# ADVERTISING IMPACT

This section compares the perceptions and behaviors of those aware of the advertising to the same measures among those not aware of the advertising. The lift or “increment” observed among those aware of the ads is considered influenced by the advertising.

# Ad Impact on Familiarity, Rating, and Intent



- The 2020 advertising works to familiarize consumers with the Williamsburg leisure travel product, build overall perceptions of the destination, and generate intent to visit in the next year. While the level of ad-influenced travel and ROI revealed later in this report relate to ad influence over the past year, the ads will continue to have an influence outside the scope of this research.

# Impact on Image – Amenities

- The 2020 advertising strengthens the perception that Williamsburg provides all these leisure travel amenities.

Williamsburg mean rating on a 5-point scale for...	Unaware	Ad-Aware	Difference
Waterfront/beach	2.92	3.39	0.47
Evening activities	3.38	3.83	0.45
Outdoor activities such as hiking, biking, kayaking, canoeing	3.44	3.82	0.37
Unique local dining	3.63	3.98	0.35
Bar scene	3.03	3.38	0.34
Shopping	3.65	3.99	0.34
Festivals and events	3.57	3.91	0.34
Distilleries	3.12	3.45	0.33
Wineries	3.24	3.53	0.29
Breweries	3.23	3.52	0.29
Live music and concerts	3.24	3.53	0.29
Value for the money	3.60	3.88	0.28
Variety of local art and handicrafts	3.71	3.98	0.27
Variety of recreational activities	3.72	3.98	0.27
Must-see attractions	3.78	4.03	0.25
Quality of experience	3.90	4.14	0.24
Hospitality	3.86	4.10	0.24
Quaint, walkable town center	3.95	4.13	0.17
The combination of history and entertainment	4.10	4.26	0.16
Family friendly	4.18	4.31	0.12
Historic sites and landmarks	4.33	4.37	0.04

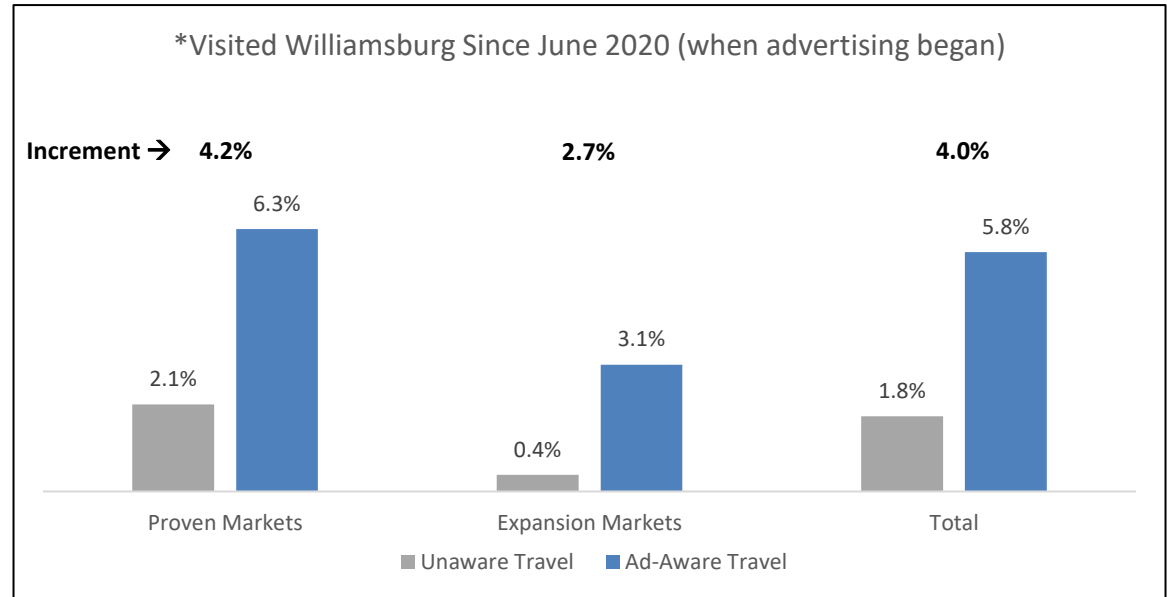
# Impact on Image – Perceptions

- The 2020 advertising also builds specific perceptions of Williamsburg as a place to visit for a leisure trip.

Williamsburg mean rating on a 5-point scale for...	Unaware	Ad-Aware	Difference
Has restaurants that I want to go to	3.54	3.96	0.42
Has good local breweries or wineries	3.24	3.58	0.34
Has taken steps to protect visitors during the coronavirus pandemic	3.39	3.72	0.33
A place I would recommend to friends/family	3.84	4.16	0.33
Offers restaurants and dining options that meet my needs	3.74	4.06	0.32
Has locally owned boutiques, outlets, etc.	3.67	3.96	0.29
Is safe to visit during the coronavirus pandemic	3.06	3.35	0.29
An experience that is relevant to me	3.73	4.01	0.28
Offers lodging options that meet my needs	3.81	4.08	0.27
A place you can visit over and over again	3.68	3.94	0.26
Interesting museums	3.84	4.09	0.25
An easy/convenient place to get to	3.83	4.08	0.24
A fun place to visit	3.92	4.16	0.24
Has amenities/attractions that I'm interested in	3.84	4.07	0.23
Is a good place for adults	4.01	4.22	0.21
Provides a memorable experience with my family	3.99	4.18	0.19
Is a good place for kids	3.96	4.14	0.17
A place to learn and discover new things	4.08	4.25	0.17
Nationally known attractions	4.08	4.24	0.15
Is a good place to experience history	4.26	4.38	0.12
Is crowded	3.30	3.42	0.12
Is expensive	3.29	3.39	0.10

# Impact on Travel

- The 2020 advertising ultimately influenced travel to the Williamsburg, VA, area – including Colonial Williamsburg, Busch Gardens, Williamsburg shopping centers/ outlets, Jamestown, and Yorktown.
- The advertising influenced travel from both market groups – but had a stronger impact in the proven markets.



\*Not counting trips to visit family or friends.



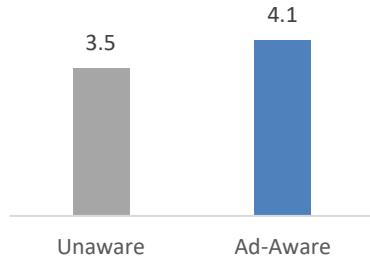
# Economic Impact and ROI

- The 2020 advertising ultimately influenced about 175,000 trips to the Williamsburg area, resulting in \$196 million in visitor spending and a return of \$27 in visitor spending for each \$1 invested in the media buy.
- It should be noted that no comparison to previous results is shown here given the dramatic differences of calendar year 2020, making it a “stand-alone” year that should be reviewed in isolation concerning these ultimate measures of advertising influence and return.

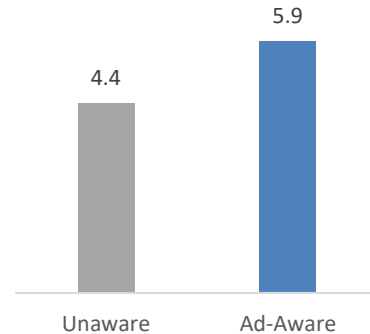
	Proven Markets	Expansion Markets	Total
Target HHs	7,761,679	1,887,366	9,649,045
Ad Awareness	47%	40%	46%
Ad-Aware HHs	3,668,474	745,587	4,414,060
Incremental Travel %	4.2%	2.7%	4.0%
<b>Incremental Trips</b>	<b>155,209</b>	<b>19,801</b>	<b>175,010</b>
Avg. Trip Spending	\$1,063	\$1,573	\$1,121
Ad-Influenced Trip Spending	\$165,047,661	\$31,142,388	\$196,190,049
Media Investment			\$7,261,333
<b>ROI</b>			<b>\$27</b>

# Impact on the Trip

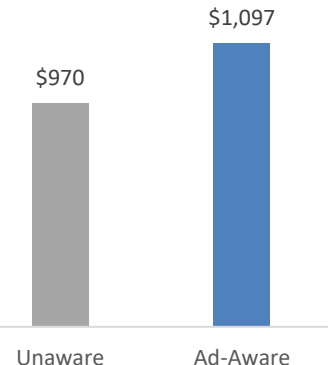
Avg. number of days in Williamsburg



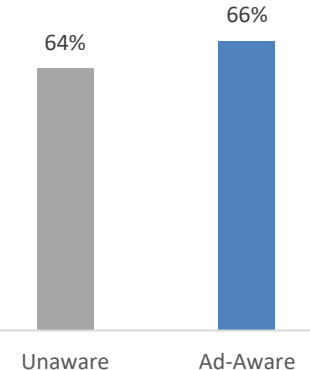
Avg. number of activities in Williamsburg



Avg. trip spending



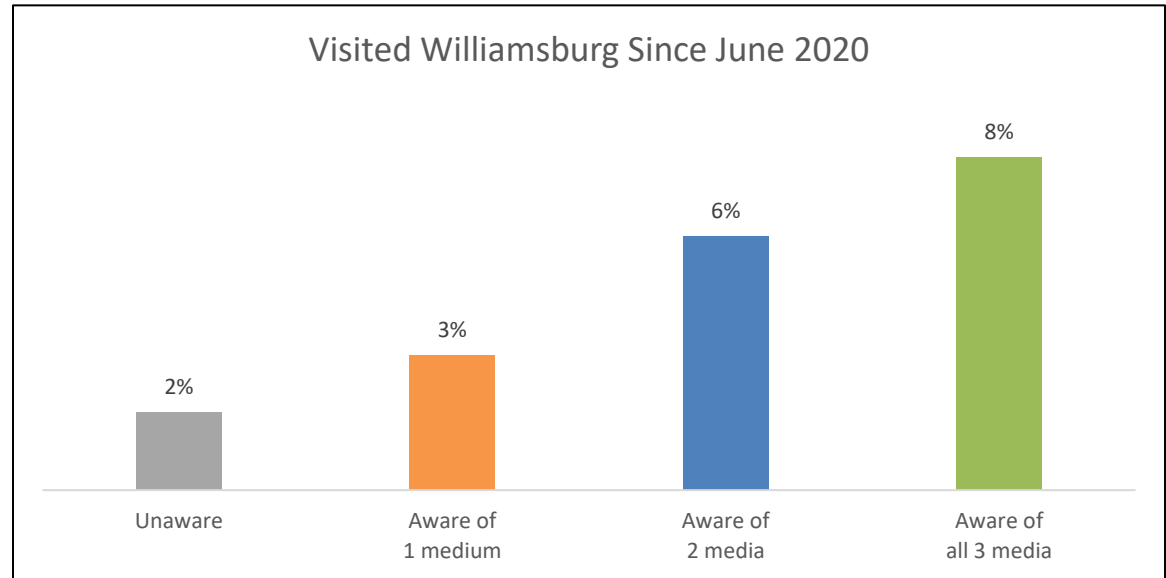
Extremely satisfied with trip



- The advertising not only influenced the decision to visit the Williamsburg area, but it also gave visitors ideas of things to do – leading to longer, more active and better trips with higher spending.

# Media Overlap Impact

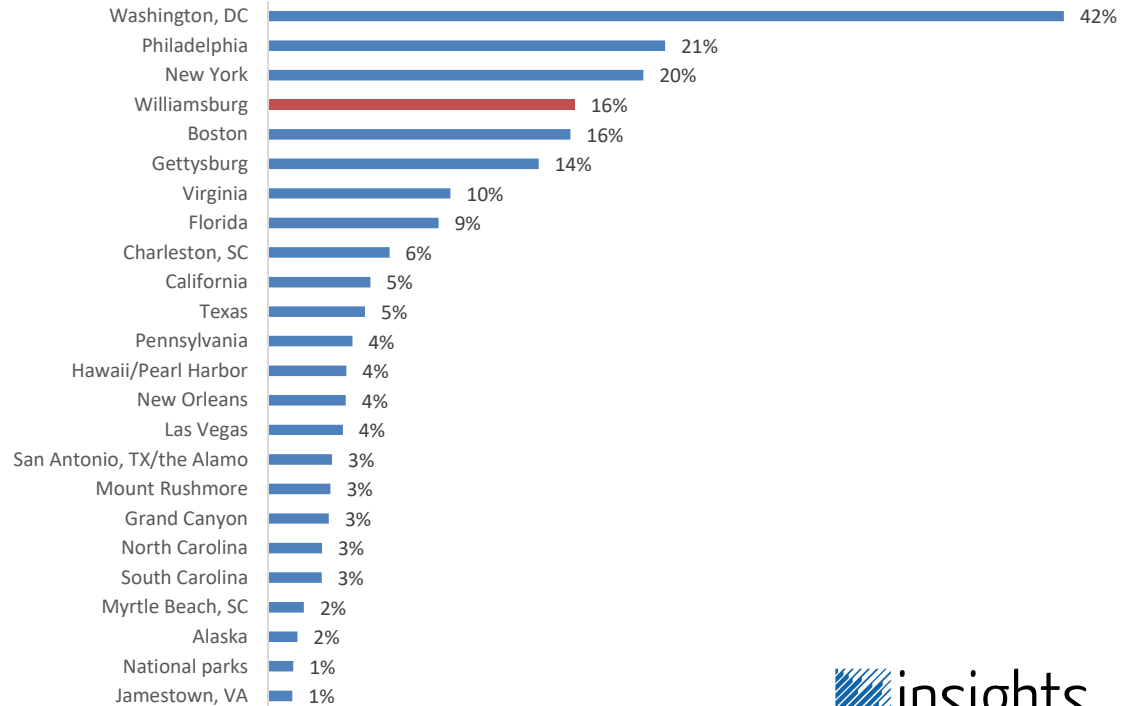
- We previously reviewed the level of advertising media overlap. Here we see that the combinations of two ad media or all three ad media are what drove the influenced Williamsburg travel.
- Generating overlap continues to be critical and should be a strategic goal when developing the media plan.



# COMPETITIVE ENVIRONMENT

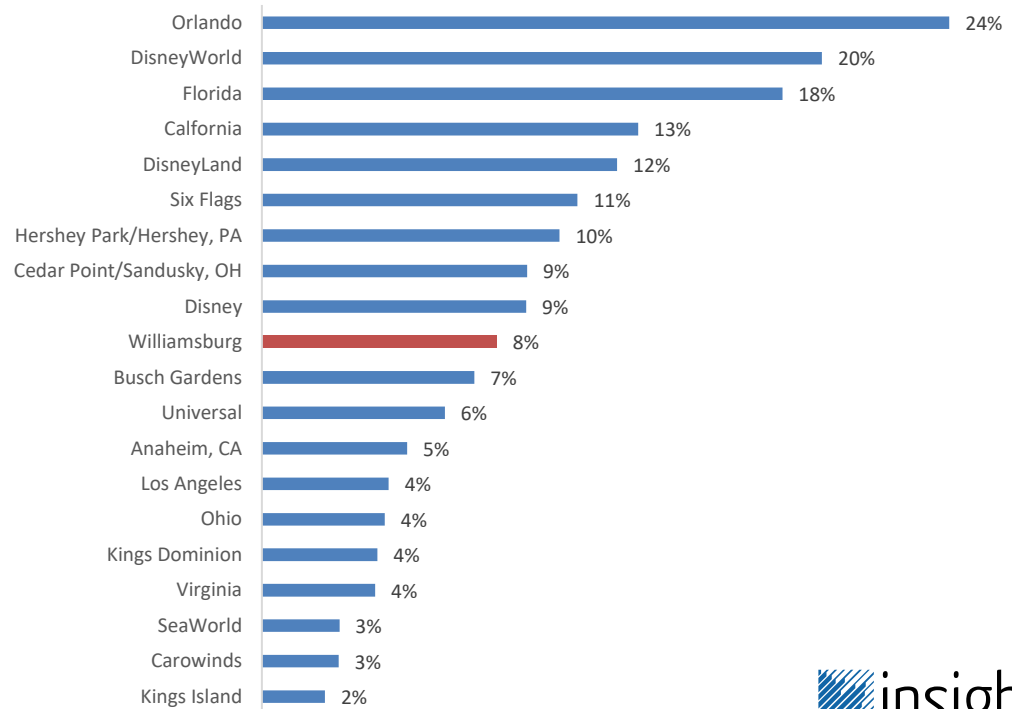
# Top-of-Mind U.S. History Destinations

- A new question was added to explore top-of-mind (unaided) places that come to mind when thinking about leisure destinations where one can experience U.S. history.
- Williamsburg is tied with Boston in the fourth position, behind only DC, Philadelphia, and New York.



# Top-of-Mind Theme Park Destinations

- Another new unaided question explored what places come to mind when thinking about leisure travel destinations with theme parks.
- Williamsburg is middle-of-the-pack in this category that is dominated by mentions of Orlando, Disney, and Florida.





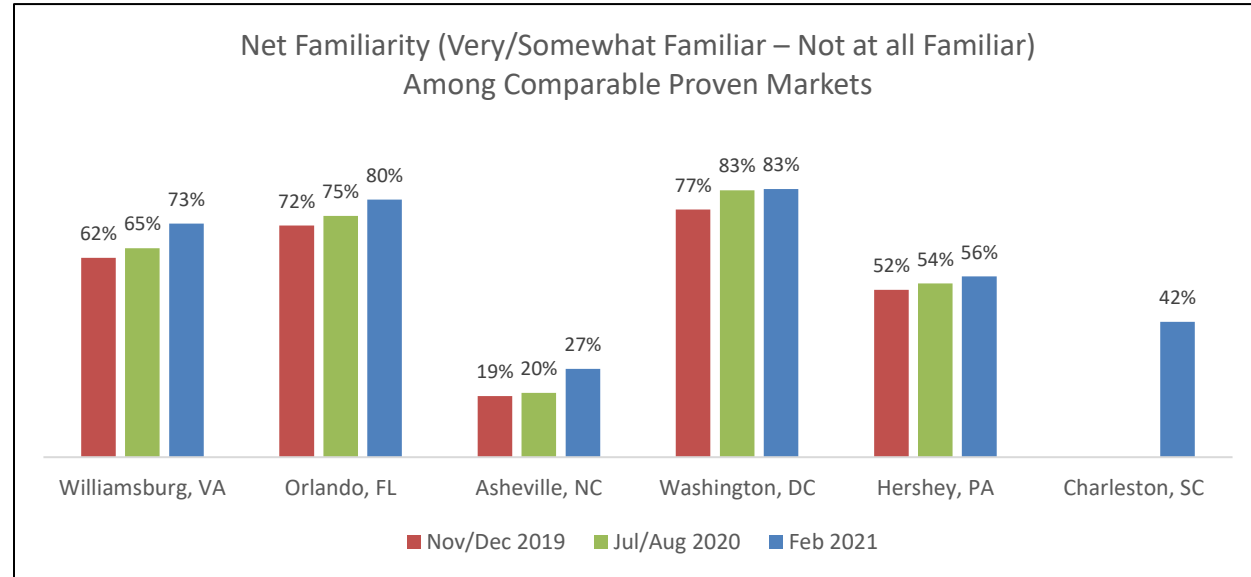
# Competitive Set

- Attitudes and behaviors toward a competitive set were explored in order to track Williamsburg's position in the competitive landscape.
- Specifically, respondents were asked about their attitudes, image and experience with a selection of destinations that share characteristics of historical appeal or general cultural travel interest. These are:
  - 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
  - **Charleston, SC (this is a new destination, replacing Annapolis, MD)**



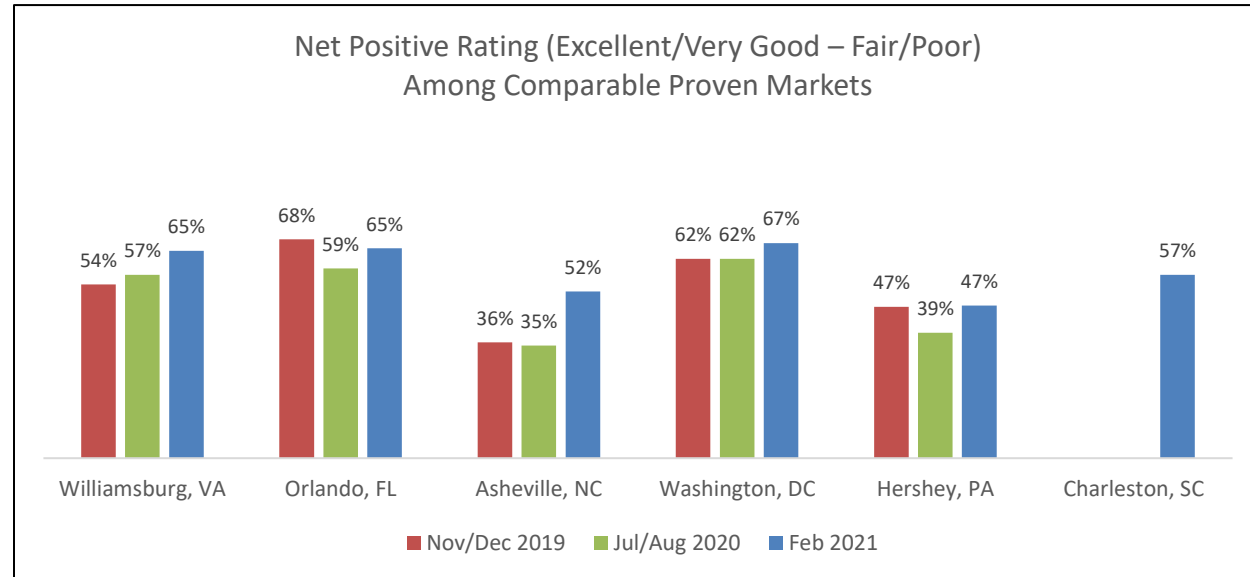
# Competitive Familiarity Trend

- When looking at the measure of net familiarity in the comparable set of markets, we see that Williamsburg and most other destinations have achieved gains since mid-summer 2020.
- The Williamsburg gain makes sense given the advertising efforts (the reader will recall the review of ad impact on familiarity). The other destinations might also be advertising, helping to drive their gains.
- We also know that consumers are anxious to travel for leisure – and many are planning trips, perhaps drawing their attention to travel advertising.



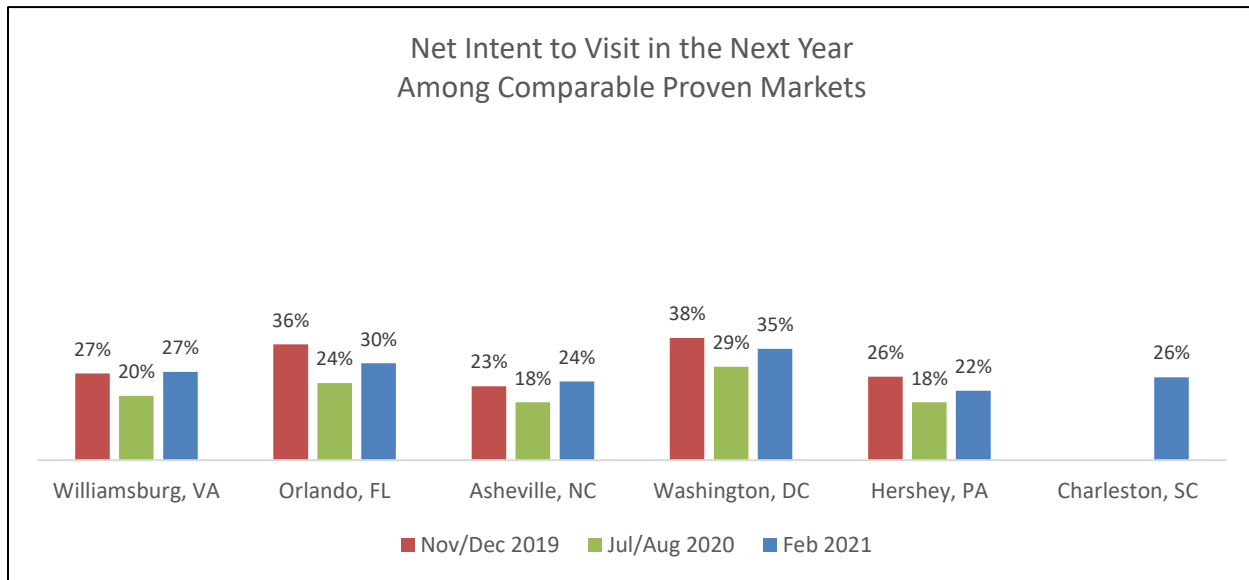
# Competitive Overall Rating Trend

- All destinations also experienced gains in the measure of net positive rating. Williamsburg, Asheville, and DC are at peak levels of the past three years.
- This again is likely a function of a combination of advertising impact and improving consumer sentiment.



# Competitive Intent to Visit Trend

- As of July/August 2020, COVID-19 had driven declines in intent to visit all destinations in the competitive set.
- Now in February 2020, intent has rebounded – and Williamsburg is at 2019 levels.



\*Accounts for 100% of those already planning a trip, 80% of those very likely to visit, and 20% of those somewhat likely to visit

# Destination Amenities

Above average across destinations

Average across destinations

Below average across destinations

- Given the addition of some new destination amenities and Charleston as a member of the competitive set, this color-coded table provides a refreshed snapshot of the competitive image landscape.
- Williamsburg maintains strengths in historic sites, family-friendly, and history/entertainment combo. It also excels at the new amenity of having a quaint, walkable town center.
- Charleston has many strengths and is a formidable addition to the competitive set.

Mean Rating of Destination (5-point scale)	Williamsburg, VA	Orlando, FL	Asheville, NC	Washington, DC	Hershey, PA	Charleston, SC
Historic sites and landmarks	4.35	3.09	3.86	4.53	3.36	4.06
Family friendly	4.24	4.38	3.91	3.93	4.21	4.02
The combination of history and entertainment	4.17	3.23	3.82	4.21	3.41	3.90
<b>Quaint, walkable town center</b>	<b>4.04</b>	<b>3.39</b>	<b>3.81</b>	<b>3.57</b>	<b>3.53</b>	<b>4.08</b>
Quality of experience	4.01	4.06	3.94	4.07	3.79	3.99
Hospitality	3.97	3.97	3.96	3.51	3.79	4.02
Must-see attractions	3.90	4.09	3.81	4.37	3.66	3.81
Variety of recreational activities	3.84	4.06	3.79	3.61	3.60	3.87
Variety of local art and handicrafts	3.83	3.35	3.85	3.51	3.34	3.89
Shopping	3.81	3.86	3.70	3.69	3.52	3.84
Unique local dining	3.79	3.69	3.86	3.86	3.49	4.02
Value for the money	3.73	3.26	3.64	3.43	3.58	3.77
Festivals and events	3.73	3.78	3.78	3.78	3.53	3.74
<b>Outdoor activities such as hiking, biking, kayaking, canoeing</b>	<b>3.62</b>	<b>3.39</b>	<b>3.87</b>	<b>3.24</b>	<b>3.27</b>	<b>3.83</b>
Evening activities	3.59	3.92	3.71	3.82	3.36	3.85
Wineries	3.38	3.07	3.55	2.99	3.03	3.38
Live music and concerts	3.37	3.69	3.66	3.55	3.32	3.70
Breweries	3.37	3.15	3.52	3.13	3.06	3.43
Distilleries	3.27	3.07	3.49	3.05	2.92	3.39
Bar scene	3.20	3.35	3.48	3.51	2.97	3.63
<b>Waterfront/beach</b>	<b>3.14</b>	<b>3.42</b>	<b>2.81</b>	<b>2.62</b>	<b>2.65</b>	<b>3.90</b>

# Destination Perceptions

Above average across destinations

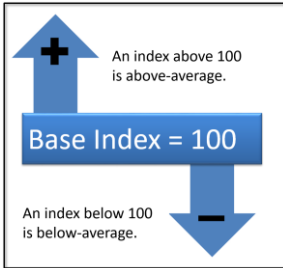
Average across destinations

Below average across destinations

- In terms of specific destination perceptions, Williamsburg stands out for a place to experience history and a place to discover new things. It is also perceived as accessible to consumers in the target markets.
- Charleston is among the top places for adults, restaurants, and boutiques.

Mean Rating of Destination (5-point scale)	Williamsburg, VA	Orlando, FL	Asheville, NC	Washington, DC	Hershey, PA	Charleston, SC
Is a good place to experience history	4.31	2.98	3.81	4.41	3.28	3.97
A place to learn and discover new things	4.16	3.61	3.88	4.29	3.48	3.94
Nationally known attractions	4.15	4.35	3.87	4.49	3.72	3.85
Is a good place for adults	4.11	3.90	4.06	4.16	3.64	4.14
Provides a memorable experience with my family	4.08	4.25	3.82	4.18	3.86	3.93
Is a good place for kids	4.04	4.42	3.53	3.87	4.18	3.72
A fun place to visit	4.03	4.19	3.87	4.06	3.93	4.04
A place I would recommend to friends/family	3.99	3.97	3.83	3.98	3.78	3.97
Interesting museums	3.96	3.02	3.63	4.44	3.27	3.74
Has amenities/attractions that I'm interested in	3.95	3.90	3.86	4.09	3.58	3.91
An easy/convenient place to get to	3.95	3.46	3.69	3.77	3.76	3.85
Offers lodging options that meet my needs	3.94	3.89	3.88	3.68	3.70	3.88
Offers restaurants and dining options that meet my needs	3.89	3.92	3.93	3.90	3.55	3.98
An experience that is relevant to me	3.86	3.71	3.83	4.02	3.50	3.93
<b>Has locally owned boutiques, outlets, etc.</b>	<b>3.81</b>	<b>3.46</b>	<b>3.83</b>	<b>3.56</b>	<b>3.46</b>	<b>3.91</b>
A place you can visit over and over again	3.80	3.99	3.76	4.11	3.59	3.88
Has restaurants that I want to go to	3.73	3.67	3.77	3.78	3.44	3.99
Has taken steps to protect visitors during the coronavirus pandemic	3.54	3.48	3.60	3.47	3.40	3.52
Has good local breweries or wineries	3.40	3.10	3.64	3.16	3.06	3.55
Is crowded	3.35	4.34	3.29	4.03	3.54	3.48
Is expensive	3.34	4.18	3.56	3.94	3.34	3.56
Is safe to visit during the coronavirus pandemic	3.20	2.98	3.44	3.04	3.03	3.26

# Williamsburg Competitive Amenities & Perceptions Change



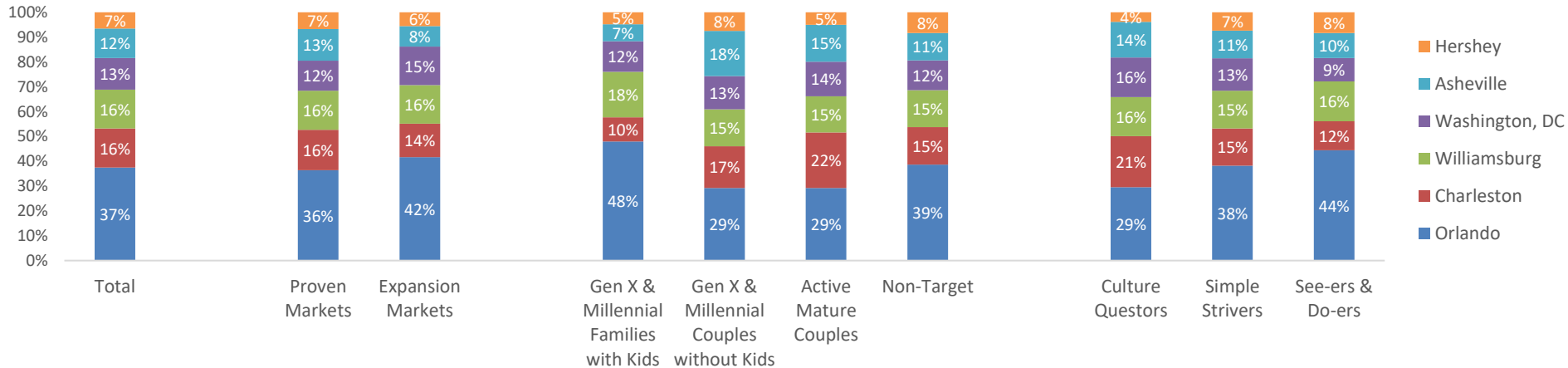
Williamsburg Amenities Competitive Index	Nov/Dec 2019	Feb 2021
Historic sites and landmarks	110	113
The combination of history and entertainment	108	111
Variety of local art and handicrafts	103	107
Value for the money	103	106
Hospitality	101	103
Family friendly	100	103
Shopping	99	103
Variety of recreational activities	98	102
Quality of experience	99	101
Festivals and events	98	100
Must-see attractions	96	98
Evening activities	96	98
Live music and concerts	94	96

Williamsburg Perceptions Competitive Index	Nov/Dec 2019	Feb 2021
Is a good place to experience history	112	115
Interesting museums	106	108
A place to learn and discover new things	104	107
An easy/convenient place to get to	104	106
Is a good place for adults	101	103
Offers lodging options that meet my needs	102	103
A place I would recommend to friends/family	100	102
An experience that is relevant to me	100	102
Has amenities/attractions that I'm interested in	99	102
Offers restaurants and dining options that meet my needs	100	101
Provides a memorable experience with my family	99	101
Nationally known attractions	99	101
Is a good place for kids	99	101
A fun place to visit	99	100
A place you can visit over and over again	97	99
Is expensive	91	91
Is crowded	90	90

- Using comparable markets and a comparable competitive set, Williamsburg has improved its competitive position in terms of the destination amenities and perceptions.

# Preferred Destination

If you could pick one of these places to visit, which would it be?



- Finally, a review of the “preferred destination” (If you had to pick one to go to, which would it be?) shows that Orlando gets the largest percentage overall and of every target group.
- Williamsburg is consistent across groups, garnering between 15% and 18% of the selections.

# APPENDIX: QUESTIONNAIRE



# Questionnaire

Greater Williamsburg Chamber & Tourism Alliance  
2020 Image & Advertising Effectiveness  
July 2020

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

ZIP. What is your ZIP code? \_\_\_\_\_

51. 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

52. 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		
<i>The coronavirus/COVID-19 is impacting Americans' lives to varying degrees. However, for this question we are interested in your travel behavior under normal circumstances.</i>		TERMINATE AFTER SCREENING QUESTIONS
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		

53. What is your age? \_\_ TERMINATE AFTER SCREENING QUESTIONS IF < 18

54. Which of the following social networking sites do you regularly use?

ROTATE, ANCHOR "NONE"	
Facebook	
Instagram	
Pinterest	
Twitter	
YouTube	
Yelp	
TripAdvisor	
TikTok	
None of these	

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Segment. Here are some statements about your attitudes toward vacation travel – please indicate how much you agree or disagree with each statement.

	DISAGREE		AGREE	
	Completely	Somewhat	Somewhat	Completely
On my vacations, I like to visit places I'm familiar with				
My trips usually include visits to museums and historic sites				
Vacations should maximize the amount of things you see and do				
Leisure travel should be relaxing and easy to both plan and enjoy				
I like to experience the arts and culture of the places I visit				
We do so much on our trips that I need to rest when I return				
I like to visit places that are easy to get to and to get around in				
I think that travel is an opportunity to learn				
I value experiences over getting the best price.				

Questions to collect COVID-19 impact and perceptions

C1. Under normal circumstances, how many leisure trips do you typically take per year? A leisure trip is one that involves an overnight stay or is at least 50 miles from home. \_\_\_\_

C2. How many leisure trips have you taken since the spring of 2020 and how many do you plan to take through the rest of 2020? Again, a leisure trip is one that involves an overnight stay or is at least 50 miles from home.

Leisure trips taken since spring 2020	Leisure trips planned for the rest of the summer/fall/winter 2020

C3. How much do you agree with the following statements given the coronavirus/COVID-19 pandemic?

[ROTATE]	1 Disagree Strongly	2	3	4	5 Agree Strongly
The thought of traveling scares me right now					
I am now more likely to take a road trip versus fly than I was before the coronavirus					
I am now less likely to travel due to financial concerns					
I'm concerned that the coronavirus situation will cause me to earn less money					
If there are big discounts available on flights or hotels, I'm going to take advantage of those and plan a trip					
It is irresponsible to travel right now					
I am optimistic regular travel will resume soon					
I feel like I need to get away now more than ever					

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Questions to assess image and 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						

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# Questionnaire

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					

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					
Unique local dining					
Special dining					
Bar scene					
Breweries					
Wineries					
Distilleries					

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

ROTATE	1 Disagree Strongly	2	3	4	5 Agree Strongly
Is a good place for adults					
An experience that is relevant to me					
Is a good place for kids					

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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					
Is safe to visit during the coronavirus pandemic					
Has taken steps to protect visitors during the coronavirus pandemic					
Has restaurants that I want to go to					
Has good local breweries or wineries					

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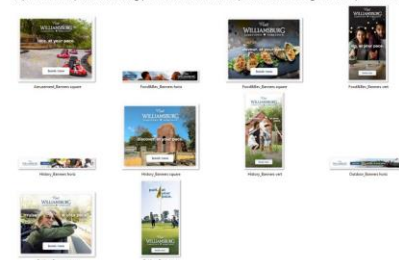
5

## 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.

!:\Ads Master\C.Williamsburg\2020 Ad Effectiveness\WTC LAYP Testing Creative\WTC LAYP Testing Creative\Display



ASK FOR EACH SET OF DIGITAL ADS:

Q7. Have you seen any of these ads before?

- Yes
- No

!:\Ads Master\C.Williamsburg\2020 Ad Effectiveness\WTC LAYP Testing Creative\WTC LAYP Testing Creative\Native



ASK FOR EACH NATIVE AD:

Q8. Have you seen this ad before?

- Yes
- No

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6

# Questionnaire

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ASK FOR EACH FACEBOOK AD:

Q9. Have you seen this ad before?

- Yes
- No

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ASK FOR EACH VIDEO AD:

Q10. Have you seen this ad before?

- Yes
- No

### Ad Ratings Section

Q11. 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

Q12. 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					

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7

Show unexpected Williamsburg attractions and activities					
Show a place with a rich history					
Make Williamsburg seem exciting					
Make you feel better about Williamsburg					
Make you want to learn more about what Williamsburg is doing in response to the coronavirus					
Are what you would expect to hear from a destination right now					
Make Williamsburg stand out compared to others who are not doing similar messaging					
Make you feel it is safe to travel to Williamsburg right now					
Make it look like Williamsburg is open for tourism					

Q13. 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					

### 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

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

- Less than \$50,000
- \$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

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