

# 2021 Fall & Holiday and Year-End Ad Effectiveness ROI Research

February 2022

# Contents

	Slide
Background & Objectives	3
Methodology	4
Insights	5
Advertising Overview	8
Demographic Targets	9
Personas	10
COVID-19 Perceptions Tracking	11
Competitive Environment	15
Fall & Holiday Advertising Awareness	18
Fall & Holiday Advertising Impact	26
Total 2021 Advertising Impact	32
Boston Baseline	35
Appendix: Questionnaire	39

# Background & Objectives

- The Williamsburg Tourism Council (WTC) uses paid promotional efforts to encourage travel to the area. As part of these efforts, WTC ran advertising during the 2021 fall and holiday seasons.
- 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 this marketing.
- The specific objectives of this research are to:
  - Track the impact of the COVID-19 pandemic on consumer perceptions and travel behaviors
  - Gauge advertising awareness
  - Assess advertising impact and calculate the return on the fall and holiday media investment
  - Calculate a total 2021 ROI
  - Review the competitive environment
  - Provide a baseline review of the Boston market

# Methodology

- Data was collected via an online survey so that consumers could view and evaluate the actual advertising. This provides a representative measure of aided ad recall and allows respondents to react to the creative immediately after viewing.
- A total of 2,005 surveys were completed between January 20 and 29, 2022.
- The research was conducted among leisure travelers in WTC’s 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.
- A sample of Boston residents was also included in order to explore baseline perceptions before WTC begins advertising in this market. Boston is excluded from all analysis except for the Boston-specific section of this report.
- The overall results are weighted to be representative of market population distribution.

<b>Proven Markets (short drive, established success, heaviest volume)</b>	<b>Surveys</b>
Baltimore, Charlotte, Charlottesville, Greenville NC, Harrisonburg, Philadelphia, Raleigh, Roanoke, Salisbury, DC	1,642
<b>Expansion Markets (flight markets &amp; large scale)</b>	<b>Surveys</b>
Cleveland, Columbus OH	212
Boston (future advertising target market)	151

## Travel Situation & Competitive Environment

- Consumer sentiment regarding the safety and acceptability of leisure travel was improving before the explosion of COVID-19 Omicron variant cases in January. No further gains were observed in this late January 2022 assessment. Despite the Omicron variant, the percentage of consumers ready to plan leisure travel has grown, likely because spring break is around the corner.
- Williamsburg and Philadelphia continue to battle for the third position in the competition for top-of-mind U.S. history destinations.

## Advertising Awareness

- The fall-themed, holiday-themed, and other advertising that ran during the 2021 fall and holiday seasons each reached about a third of target households. Combined, 45% of target households recall seeing any of this advertising.
- With a larger population and a higher level of ad awareness than the Expansion markets, the Proven markets account for about 80% of ad-aware households.
- Ad awareness is highest among the Gen X and Millennial Families with Kids and lowest among the Active Mature Couples. Industry-wide, older consumers are becoming increasingly difficult to reach as media becomes more and more digital.
- Ad awareness is relatively high among those who fall outside of the three demographic target groups, indicating significant spill. This is not necessarily a negative result, as the advertising can certainly influence those who are not identified as targets.
- Ad awareness is not notably different across the personas, highlighting how challenging it is to target consumers based on attitudes rather than geography or demography.

## Fall & Holiday Advertising Impact

- The advertising that aired during the 2021 fall and holiday seasons helped to familiarize the target audience with the Williamsburg travel product, boosted perceptions of the destination, and ultimately influenced travel during October through December 2021 from the Proven target markets.
- There was no ad-influenced travel from the Expansion markets during this time period, but these markets were fruitful in spring/summer 2021 when they accounted for about a quarter of ad-influenced visitor spending. So, the lack of impact during the 2021 fall and holiday season is not a red flag. Rather, future results will be monitored to determine whether a trend forms.
- The 2021 fall and holiday advertising ultimately influenced almost 45,000 trips to the Williamsburg area, resulting in \$62.4 million in visitor spending and a return of \$45 in visitor spending for each \$1 invested in the media buy.
- The Williamsburg visitors who saw the ads stayed longer, did more, spent more, and were more satisfied with their trips than unaware visitors. This indicates that the advertising is effectively showcasing the leisure travel product and giving visitors ideas that lead to longer, more active, better trips.

## Total 2021 Advertising Impact

- Combined, the 2021 spring & summer and fall & holiday advertising influenced about 356,000 Williamsburg trips and about \$469 million in visitor spending.
- With a total media investment of \$7.1 million, the total 2021 ROI is \$66 for each \$1 invested.

## Boston Baseline

- Boston consumers currently have low top-of-mind awareness of Williamsburg. Bostonians are most likely to think of DC, Boston, and New York as history destinations. Williamsburg is 13<sup>th</sup> on the list.
- Bostonians are less familiar with and give weaker overall ratings to Williamsburg compared to Proven market consumers.
- The specific destination image attributes of *family friendly* and *safe*, which rate in the “excellent” range in the Proven markets, fall in the “good” range in Boston.
- The opportunity is to familiarize Bostonians and build the Williamsburg brand through the upcoming advertising efforts. We will monitor progress in this market in the forthcoming research waves.

# Media Investment on the Ads Tested

- During the 2021 fall and holiday seasons, WTC ran fall & holiday themed ads as well as other general ads that had run earlier in the year.
- The 2021 fall and holiday themed assets tested include digital display and social media advertising.
- Samples of the ads are shown below. The entire collection of ads tested can be found in the questionnaire in the Appendix.
- WTC invested \$ 1.4 million in the 2021 fall and holiday advertising. WTC previously invested \$5.7 million in the 2021 spring and summer advertising, for a total 2021 investment of \$7.1 million on the ads tested.

Medium	2021 Spring & Summer	2021 Fall & Holiday	2021 Total
Linear TV/CTV	\$2,589,709	\$0	\$2,589,709
Digital Display/Video	\$2,317,983	\$1,267,989	\$3,585,972
Social	\$805,650	\$128,246	\$933,896
<b>Total</b>	<b>\$5,713,341</b>	<b>\$1,396,235</b>	<b>\$7,109,576</b>

Sample Fall-Themed Digital Display



Sample Holiday-Themed Digital Display



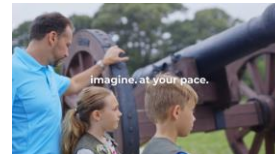
Sample Fall-Themed Social



Sample Holiday-Themed Social



Sample Other Ads



Culture Questors Video Ad

See-ers & Do-ers Video Ad



Simple Strivers Video Ad





# Demographic Targets

- WTC has defined demographic targets shown in the graphic.
- The research results are reviewed by demographic target where applicable.



## FAMILIES

Gen X // Millennials  
with Children



## COUPLES

Gen X // Millennials  
without Children

Active Mature

# 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.

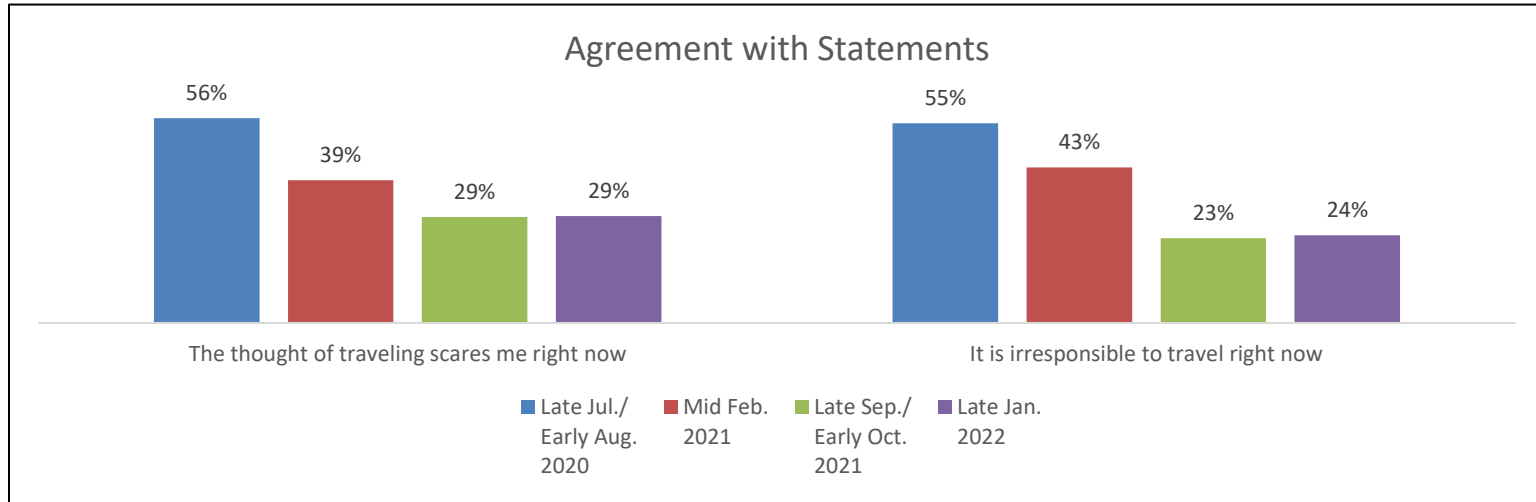
Above average agreement
Average agreement
Below average agreement

Persona Statements	Culture Questors	Simple Strivers	See-ers & Do-ers
On my vacations, I like to visit places I'm familiar with			
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			
I seek out unique local dining options on my trips			
I shop at locally owned stores on my trips			

# COVID-19 PERCEPTIONS TRACKING

The first section of this report tracks the results of the COVID-19-related questions in order to provide important context regarding the leisure traveler mindset.

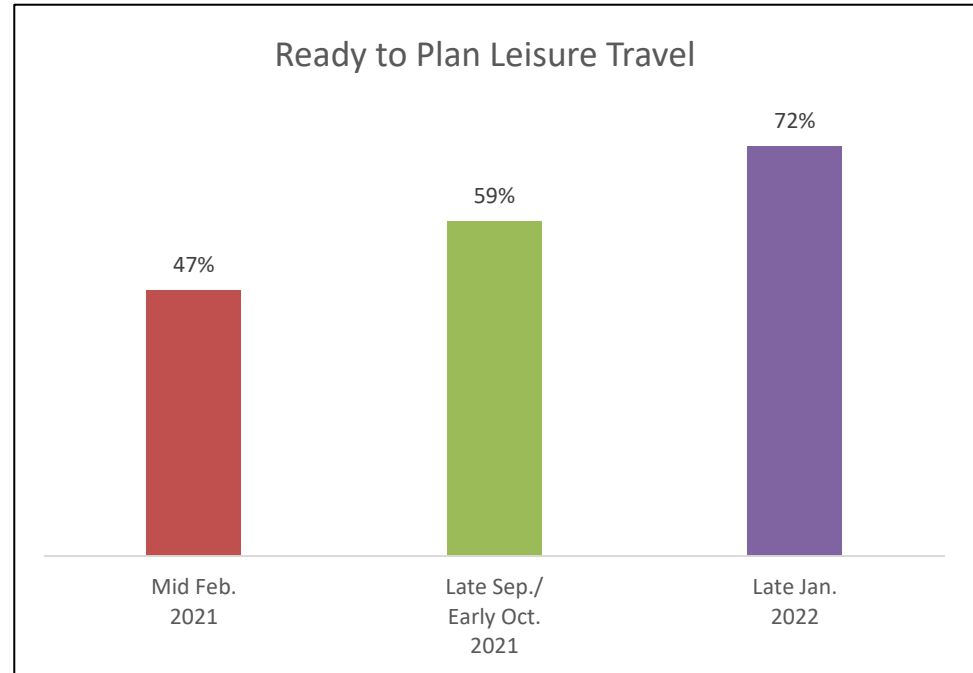
# Consumer Perceptions Change



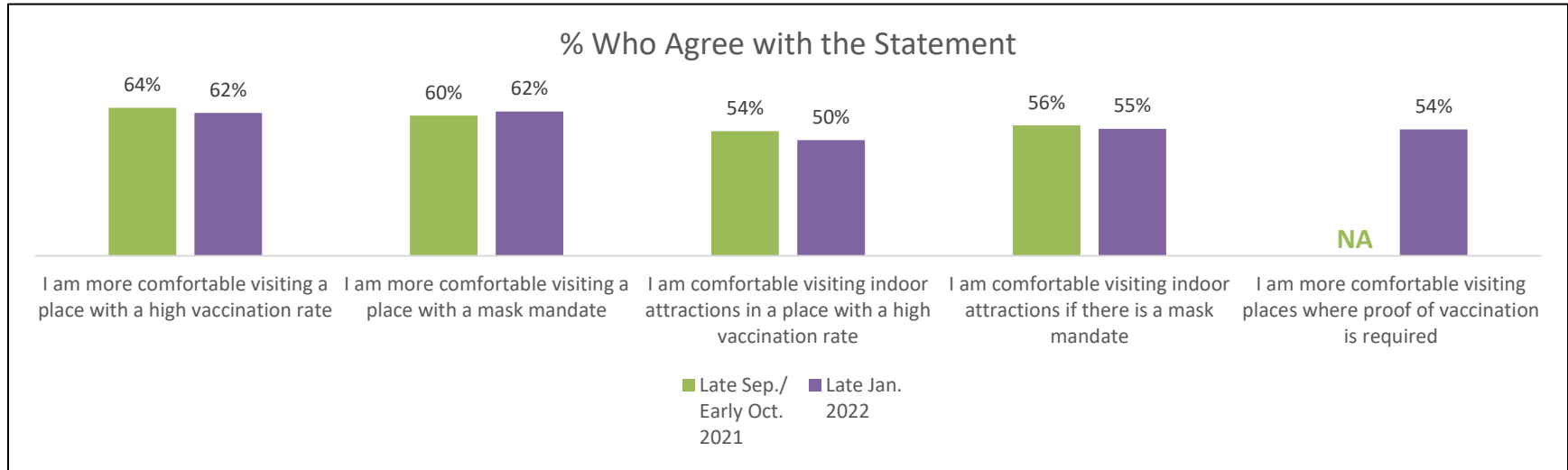
- Vaccine rollout in December 2020 resulted in greater comfort with travel as evidenced by the change in perceptions from July 2020 to February 2021.
- Travel sentiment continued to improve in late September/early October despite the Delta variant wave.
- But the explosion of Omicron variant cases prevented further progress in the late January 2022 assessment.

# Leisure Travel Planning

- Despite the Omicron variant, the percentage of consumers ready to plan leisure travel has grown since September/October.
- This result is partially driven by seasonality with spring break travel around the corner.



# Vaccines and Mask Mandates



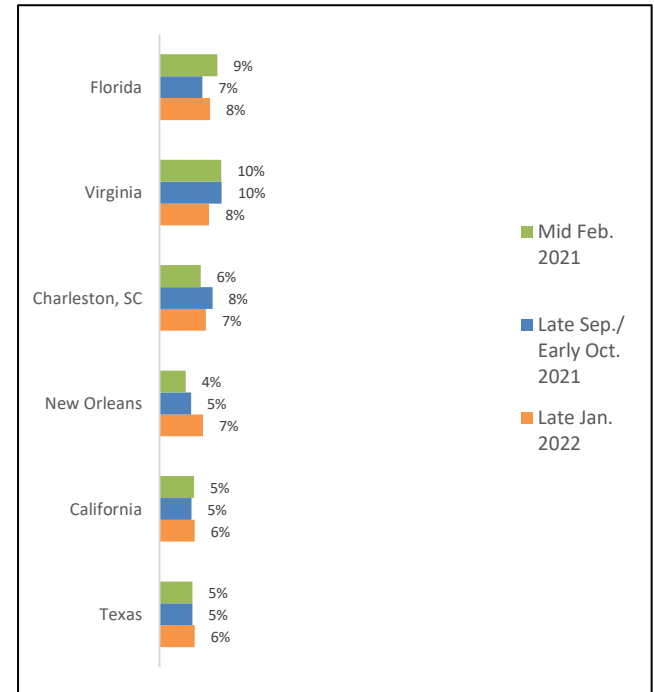
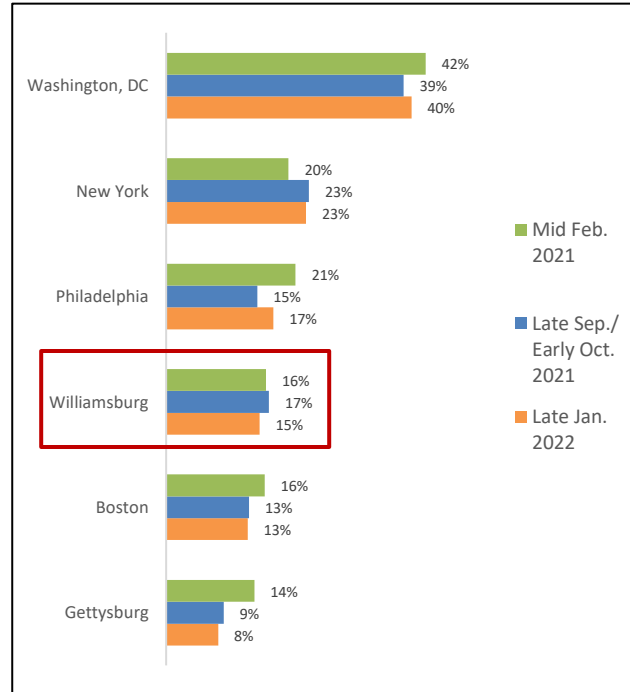
- The level of comfort provided by mask mandates and vaccination rates have not changed much since late September/early October.
- Almost two-thirds of leisure travelers feel more comfortable visiting a place with high vaccination rates or mask mandates. Fewer (around half) are more comfortable visiting indoor attractions in places with high vaccination rates or mask mandates.

# COMPETITIVE ENVIRONMENT: TOP-OF-MIND U.S. HISTORY AND THEME PARK DESTINATIONS

The section provides competitive context by tracking the measures of top-of-mind U.S. history and theme park destinations among Proven and Expansion market consumers.

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

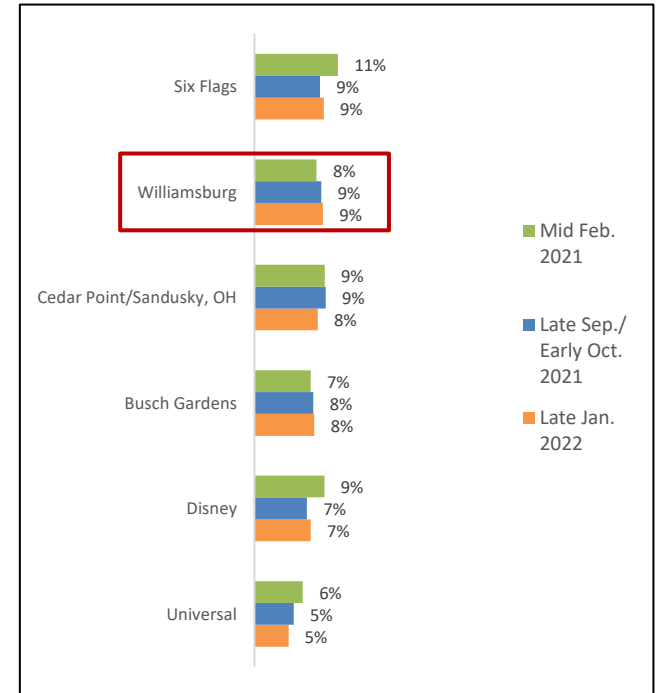
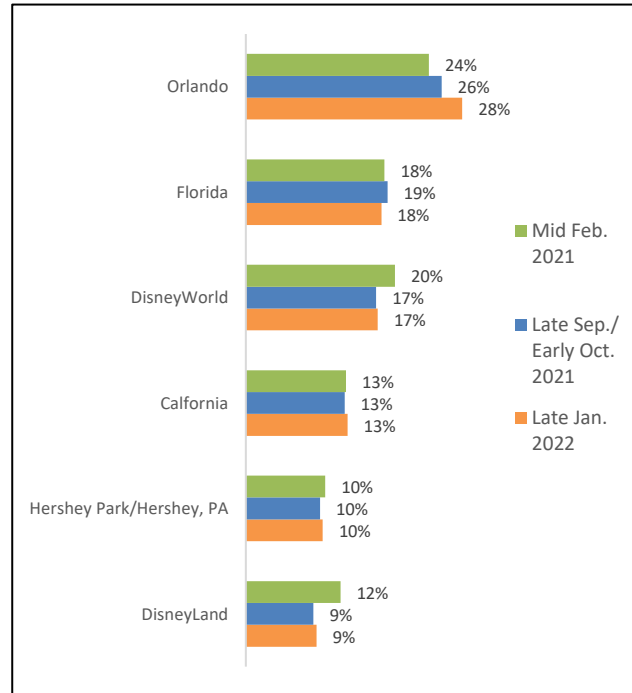
- Williamsburg and Philadelphia continue to battle for the third position in the competition for top-of-mind U.S. history destinations.





# Top-of-Mind Theme Park Destinations

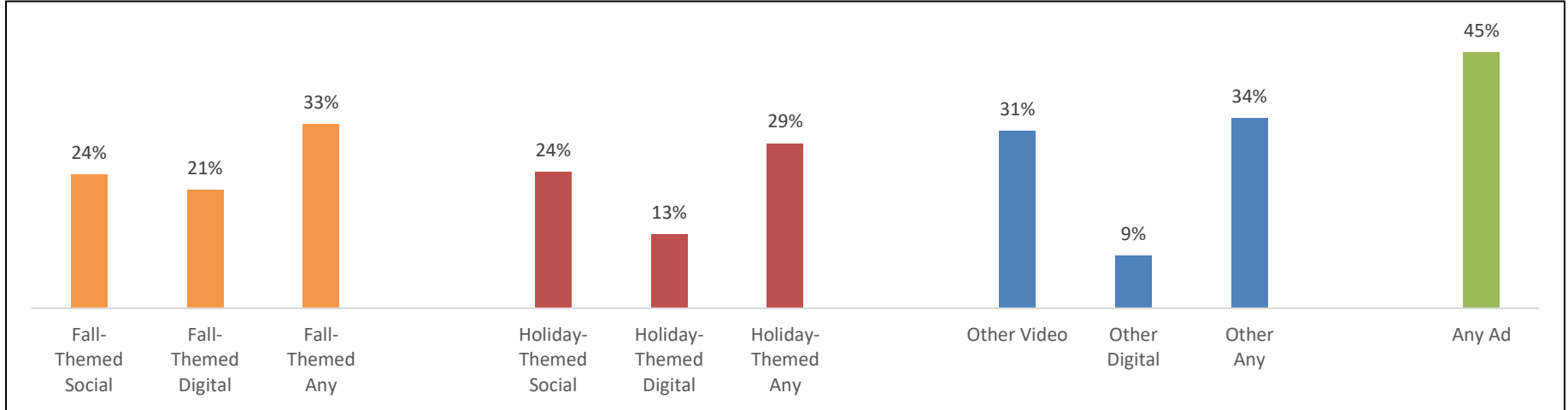
- Orlando continues to dominate the top-of-mind theme park space.
- Williamsburg held its position, which is basically on par with a handful of places like Hershey, Disneyland, Six Flags, Cedar Point, and Busch Gardens.



# FALL & HOLIDAY ADVERTISING AWARENESS

Here we review awareness of the 2021 fall & holiday season advertising. The awareness results are first presented among all consumers and then are reviewed across groups, including markets, demographic targets, age, and personas.

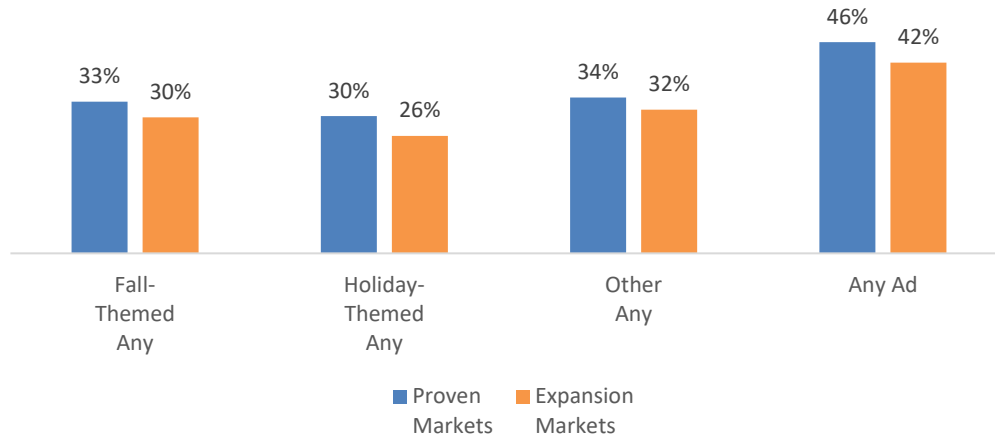
# Fall & Holiday Ad Awareness



- The fall-themed, holiday-themed and other advertising that ran during the 2021 fall and holiday seasons each reached about a third of target households. Combined, 45% of target households recall seeing any of this advertising.

# Fall & Holiday Ad Awareness by Market Group

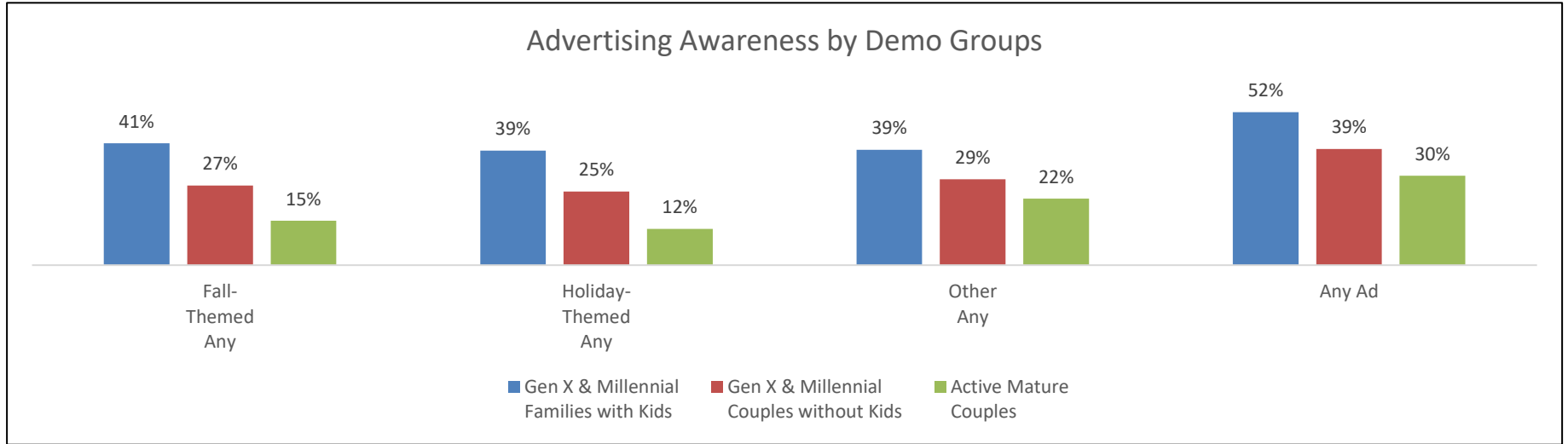
Advertising Awareness by Market Group



	Proven Markets	Expansion Markets	Total
Target HHs	7,755,563	1,883,453	9,639,015
Ad Awareness	46%	42%	45%
Ad-Aware HHs	3,589,763	787,165	4,376,928

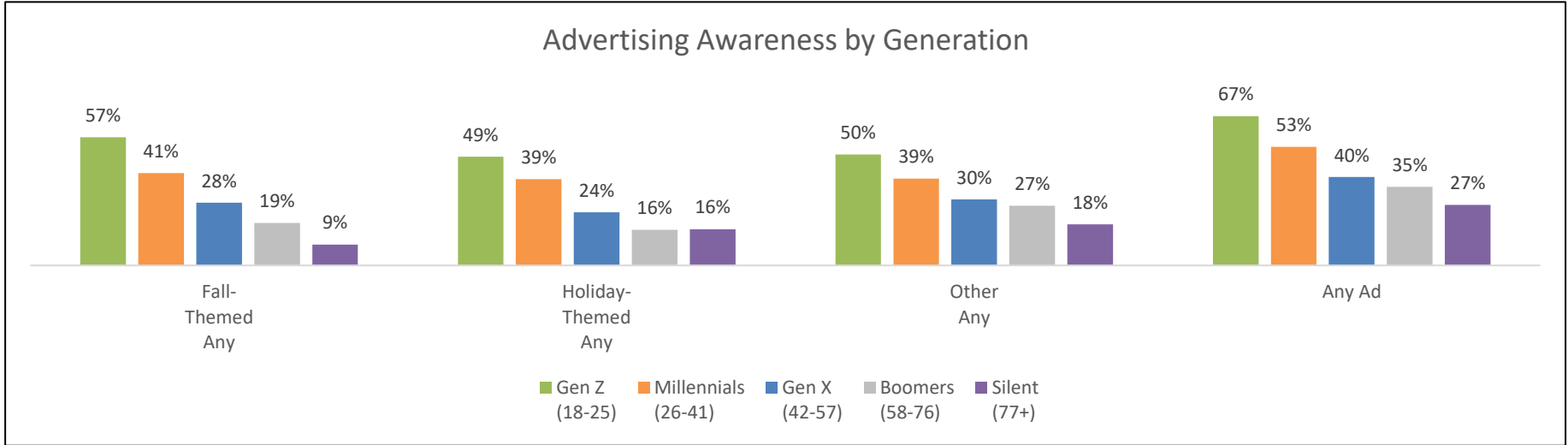
- Ad awareness is higher in the Proven markets than in the Expansion markets.
- With a larger population and higher ad awareness, the Proven markets account for most ad-aware households.

# Fall & Holiday Ad Awareness by Demo Groups



- Ad awareness is highest among the Gen X and Millennial Families with Kids and lowest among the Active Mature Couples. The same awareness pattern persists no matter which group of ads is being reviewed.

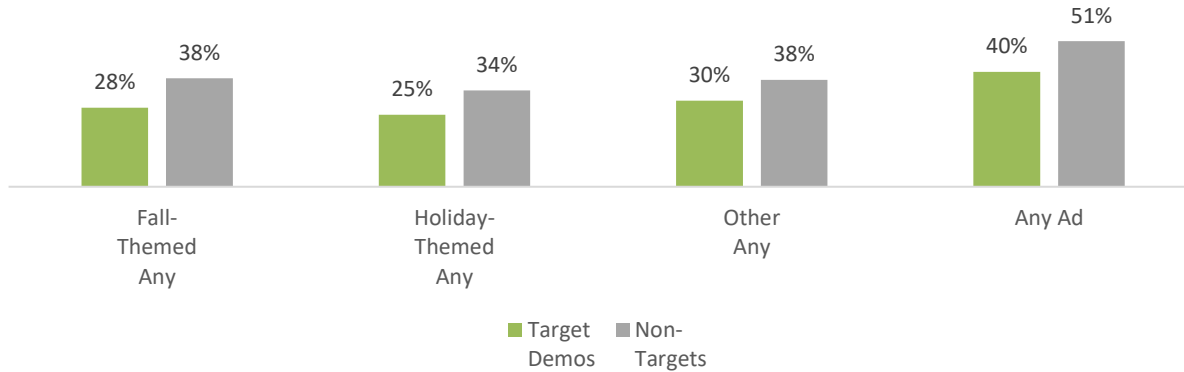
# Fall & Holiday Ad Awareness by Generation



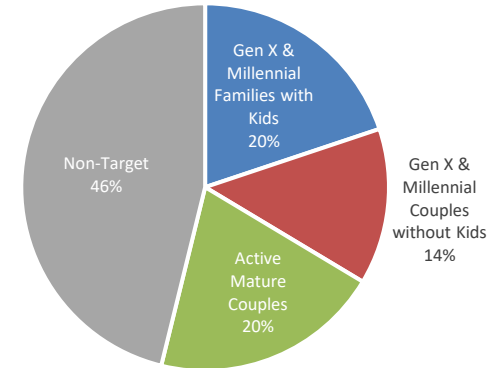
- Ad awareness is clearly higher among younger consumers. This result is currently typical in the industry – older consumers are becoming increasingly difficult to reach as media becomes increasingly digital.

# Fall & Holiday Ad Awareness Target Demos vs. Others

Advertising Awareness by Target Demos/Non-Target Demos



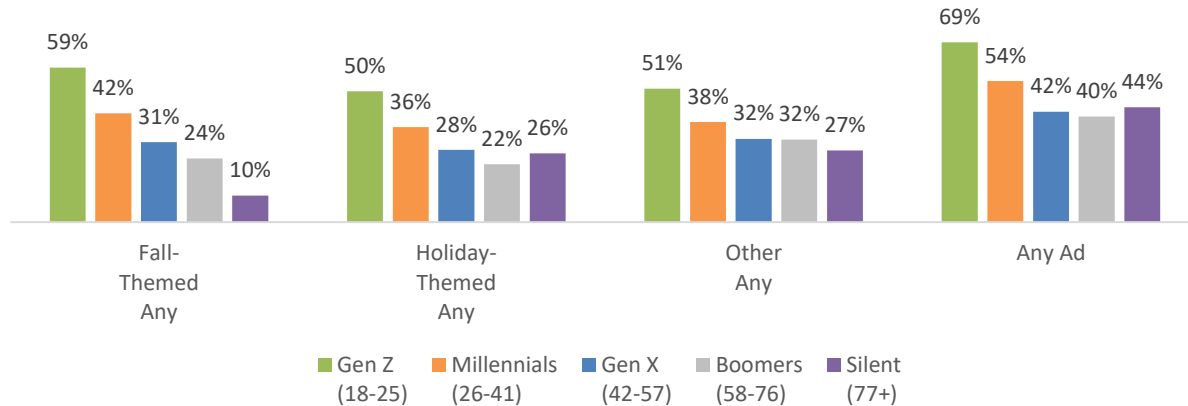
Population Distribution



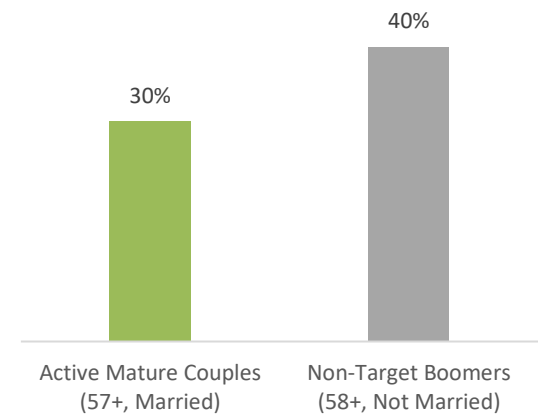
- It is also worth noting that ad awareness is relatively high among those who fall outside of the three demographic target groups, indicating significant spill. This is not necessarily a negative result, as the advertising can certainly influence consumers who are not identified as targets. Moreover, the non-target group is large, accounting for close to half of leisure traveling households.

# Fall & Holiday Ad Awareness by Generation (Non-Targets)

Advertising Awareness by Generation (Non-Target Demos)



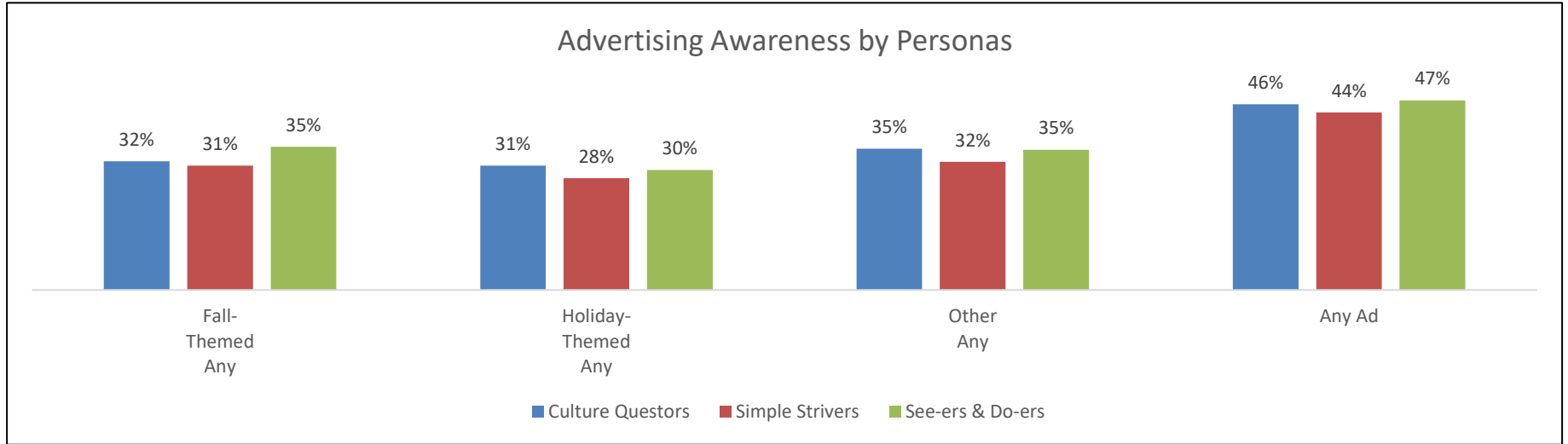
Aware of Any Ad



- Among the non-target demos, ad awareness is again relatively high among younger consumers. So, it is younger consumers who drive high awareness among the non-targets.
- But it should be noted that ad awareness is higher among the non-target Boomers than it is among the target Boomers (Active Mature Couples).



# Fall & Holiday Ad Awareness by Personas

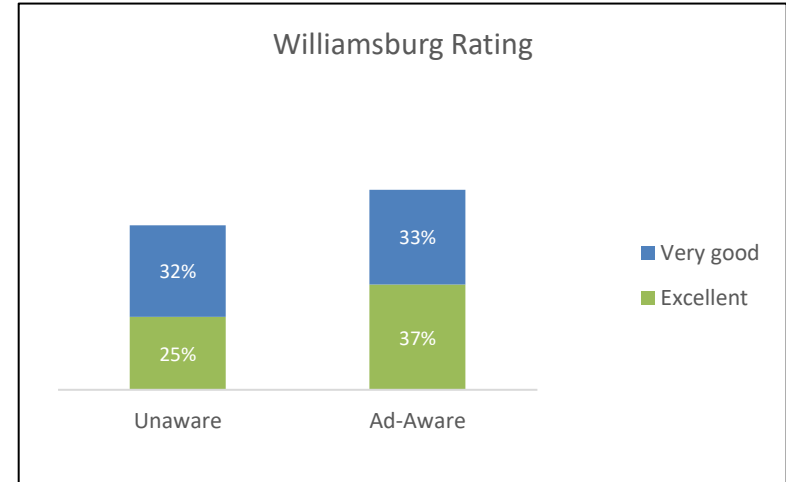
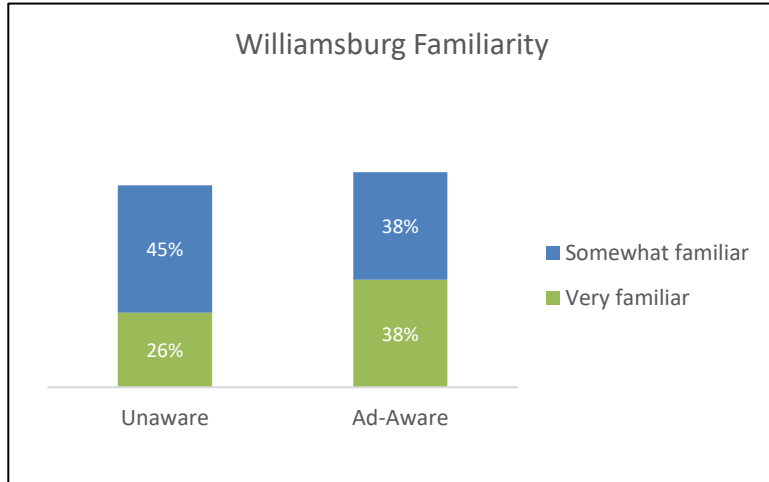


- Ad awareness is not notably different across the personas, highlighting how challenging it is to target consumers based on attitudes rather than geography or demography.

# FALL & HOLIDAY 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. The ultimate measure of advertising impact is the level of ad-influenced travel generated during the 2021 fall and holiday seasons.

# Ad Impact on Familiarity and Overall Rating



- Those aware of the fall and holiday advertising are more likely to be “very familiar” with Williamsburg and are more likely to rate the destination an “excellent” place to visit, indicating that the advertising is educating consumers and building more positive perceptions.

# Ad Impact on Image

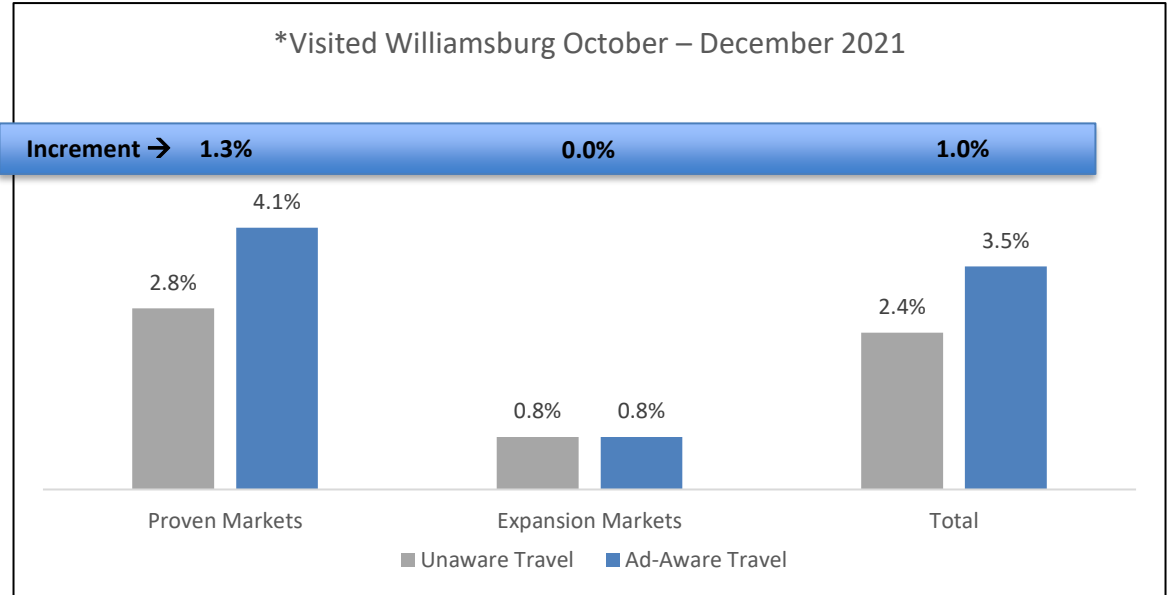
- The fall and holiday advertising helps to boost specific perceptions of Williamsburg.
- The greatest impacts are realized for attributes that are not currently strengths, such as *exciting, unexpected, forward thinking, Black history, celebrates diversity, and open-minded.*

Williamsburg mean rating on a 5-point scale for...	Unaware	Ad-Aware	Difference
An exciting destination	3.50	3.83	0.33
Has unexpected attractions and activities	3.49	3.78	0.29
A place with a forward thinking, innovative culture	3.33	3.61	0.27
Black history sites and landmarks	3.27	3.53	0.26
A place that celebrates diversity	3.38	3.62	0.24
An open-minded place	3.53	3.76	0.23
Unique local dining	3.61	3.82	0.21
A fun destination	3.72	3.93	0.20
A place with a welcoming culture	3.78	3.98	0.20
Shopping	3.56	3.73	0.17
Unique experiences	3.83	3.98	0.15
Cultural attractions	3.87	3.99	0.12
Family friendly	4.15	4.24	0.08
A safe place to visit	4.00	4.05	0.06
Historic sites and landmarks	4.25	4.26	0.01

Industry Benchmark:
4.0+ Excellent
3.75-3.99 Good
3.50 – 3.74 Average
< 3.5 Below Average

# Ad Impact on Travel

- The fall and holiday advertising ultimately influenced travel to Williamsburg during the October through December 2021 period.
- There was no ad-influenced travel from the Expansion markets during this period, but these markets have proven fruitful in the past. As reviewed later in this report, in spring/summer 2021 these markets had a relatively high rate of ad-influenced travel and relatively high average trip spending, thus accounting for about a quarter of ad-influenced visitor spending. So, the lack of advertising impact during this past fall and holiday season is not an indictment of these markets. Rather, future results will be monitored to determine whether a trend forms.



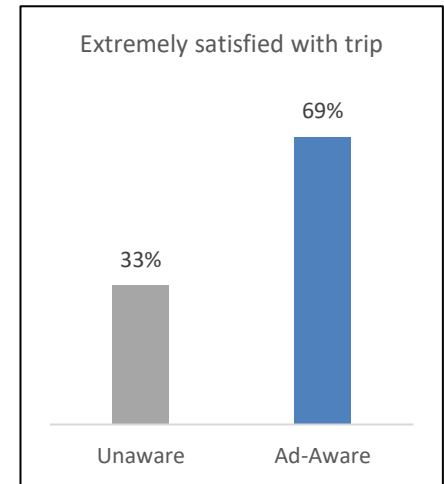
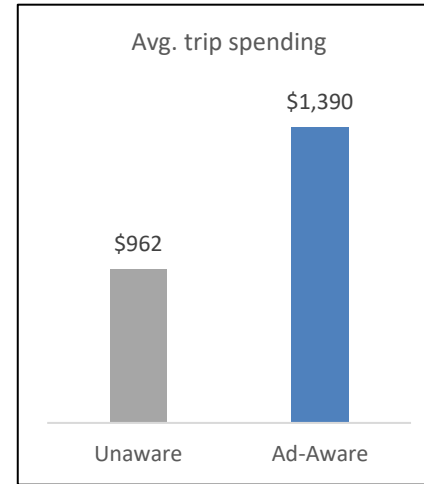
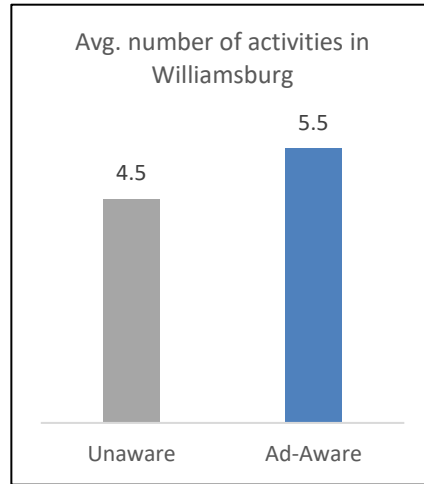
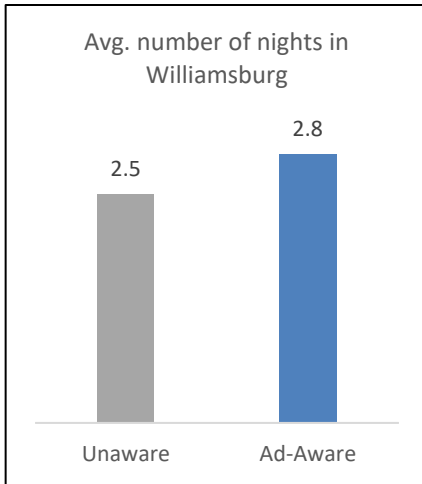
\*Not counting trips to visit family or friends. Previous ROI measurement was March 2021 through September 2021. This current measurement picks up where previous measure left off.

# Economic Impact and ROI

- The fall and holiday advertising ultimately influenced almost 45,000 trips to the Williamsburg area, resulting in \$62.4 million in visitor spending and a return of \$45 in visitor spending for each \$1 invested in the media buy.
- Again, all advertising impact during this period came from the proven markets.

	<b>Proven Markets</b>	<b>Expansion Markets</b>	<b>Total</b>
Target HHs	7,755,563	1,883,453	9,639,015
Ad Awareness	46%	42%	45%
Ad-Aware HHs	3,589,763	787,165	4,376,928
Incremental Travel %	1.3%	0.0%	1.0%
Incremental Trips	44,893	0	44,893
Avg. Trip Spending	\$1,390	\$0	\$1,390
Ad-Influenced Trip Spending	\$62,415,841	\$0	\$62,415,841
Media Investment			\$1,396,235
ROI			\$45

# Ad Impact on the Trip



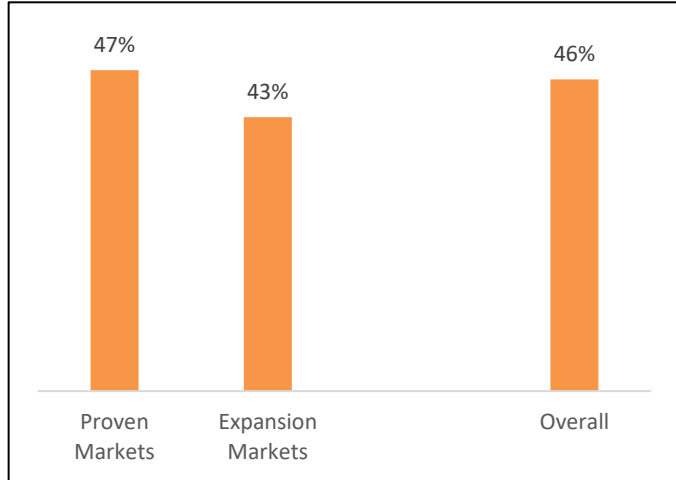
- The fall and holiday advertising influence did not stop at the decision to visit. The Williamsburg visitors who saw the ads stayed longer, did more, spent more, and were more satisfied with their trips. We have seen similar results in previous Williamsburg ad effectiveness research, which suggests that the advertising is effectively showcasing the leisure travel product and giving visitors ideas that lead to longer, more active, better trips.

# TOTAL 2021 ADVERTISING IMPACT

This section includes a review of total 2021 advertising (spring & summer and fall & holiday) impact and ROI.



# Spring & Summer Ad Awareness & Impact Review



	Proven Markets	Expansion Markets	Total
Target HHs	7,755,563	1,883,453	9,639,015
Ad Awareness	47%	43%	46%
Ad-Aware HHs	3,628,319	807,283	4,435,601
Incremental Travel %	6.6%	8.9%	7.0%
<b>Incremental Trips</b>	<b>238,820</b>	<b>71,898</b>	<b>310,718</b>
Avg. Trip Spending	\$1,270	\$1,430	\$1,307
Ad-Influenced Trip Spending	\$303,378,148	\$102,821,724	\$406,199,872
Media Investment			\$5,713,341
<b>ROI</b>			<b>\$71</b>

- As a review of the results presented in the report delivered in October 2021, the spring & summer advertising generated 46% awareness and influenced Williamsburg travel from both market groups. The advertising influenced about 311,000 trips during the March through September 2021 period, resulting in \$406 million in visitor spending and a return of \$71 for each \$1 invested.

# Total 2021 Economic Impact and ROI

- Combined, the 2021 spring & summer and fall and holiday advertising influenced about 356,000 Williamsburg trips and about \$469 million in visitor spending.
- With a total media investment of \$7.1 million, the total 2021 ROI is \$66 for each \$1 invested.

	March 2021 – September 2021	October 2021 – December 2021	Total
Incremental Trips	310,718	44,893	355,611
Avg. Trip Spending	\$1,307	\$1,390	\$1,318
Ad-Influenced Trip Spending	\$406,199,872	\$62,415,841	\$468,615,713
Media Investment	\$5,713,341	\$1,396,235	\$7,109,576
<b>ROI</b>	<b>\$71</b>	<b>\$45</b>	<b>\$66</b>

# BOSTON BASELINE

This section is an initial review of the Boston market in terms of top-of-mind awareness as well as familiarity with and ratings of Williamsburg to provide baseline perceptions before WTC begins advertising in this market. The results include comparisons to Proven and Expansion markets for context.

# Top of Mind Awareness

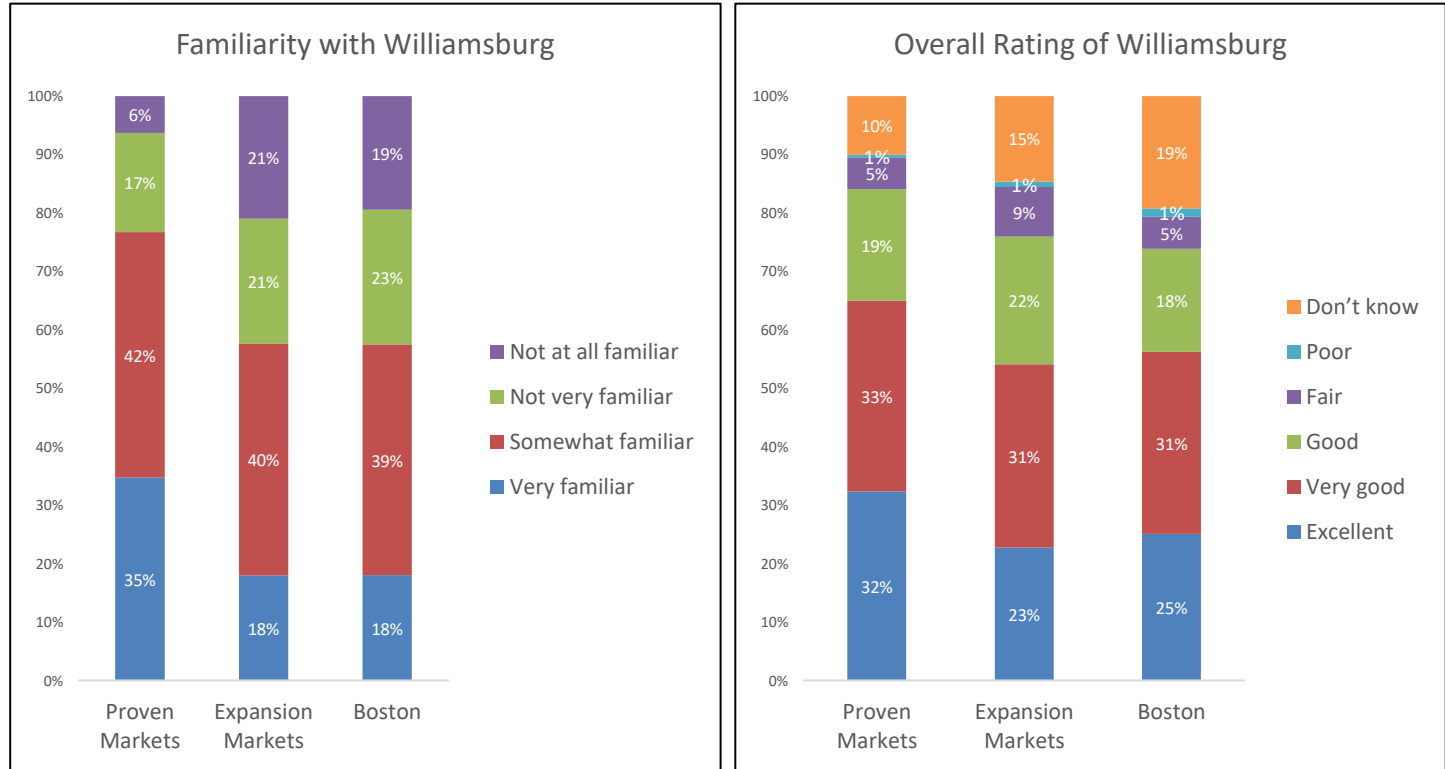
- Boston consumers currently have low top-of-mind awareness of Williamsburg.
- Bostonians are most likely to think of DC, Boston, and New York as history destinations and to think of Orlando and Florida as theme park destinations.
- What this means is that there is ample opportunity for gains in Boston.

U.S. History Destinations	Proven Markets	Expansion Markets	Boston
Washington, DC	41%	34%	46%
Boston	13%	16%	32%
New York	23%	20%	32%
Philadelphia	20%	9%	23%
Florida	7%	12%	6%
California	5%	7%	6%
Gettysburg	8%	9%	6%
Virginia	8%	6%	5%
Hawaii/Pearl Harbor	5%	4%	5%
Las Vegas	3%	6%	4%
San Francisco	3%	4%	4%
New Orleans	7%	7%	3%
<b>Williamsburg</b>	<b>17%</b>	<b>9%</b>	<b>3%</b>
Grand Canyon	4%	3%	3%
National parks	4%	3%	3%
San Antonio, TX/the Alamo	3%	2%	3%
Pennsylvania	3%	2%	2%
Alaska	2%	0%	2%
Charleston, SC	8%	5%	2%
Chicago	3%	6%	1%
Texas	6%	5%	1%
South Carolina	2%	3%	1%
Savannah, GA	4%	3%	1%
Nashville	2%	4%	1%
Myrtle Beach, SC	1%	1%	1%
Mount Rushmore	1%	1%	1%
North Carolina	3%	3%	1%
St. Augustine	2%	2%	1%

Theme Park Destinations	Proven Markets	Expansion Markets	Boston
Orlando	28%	32%	28%
Florida	17%	20%	27%
DisneyWorld	18%	16%	18%
California	13%	15%	18%
Six Flags	10%	7%	16%
Disney	8%	7%	10%
DisneyLand	9%	11%	10%
Universal	5%	4%	9%
Anaheim, CA	5%	7%	5%
Hershey Park/Hershey, PA	12%	2%	5%
Busch Gardens	9%	2%	4%
Virginia	6%	3%	2%
Cedar Point/Sandusky, OH	3%	29%	2%
Los Angeles	5%	4%	2%
SeaWorld	2%	2%	1%
<b>Williamsburg</b>	<b>11%</b>	<b>1%</b>	<b>1%</b>
Ohio	2%	8%	1%
Kings Dominion	5%	0%	1%
Carowinds	3%	0%	0%
Kings Island/Cincinnati	1%	8%	0%

# Familiarity & Overall Rating

- Bostonians are comparable to Expansion market consumers in terms of their familiarity with and overall rating of Williamsburg.
- Again, the opportunity is to familiarize consumers and build the brand through the upcoming advertising efforts.



# Image Attribute Ratings

- Finally, there is also opportunity to build specific perceptions of Williamsburg in Boston.
- *Family friendly and safe*, which rate in the “excellent” range in the Proven markets, fall in the “good” range in Boston.
- Williamsburg has room for improvement in all markets in terms of being a *forward-thinking* place with *Black history* sites.

Williamsburg Mean Rating on a 5-Point Scale	Proven Markets	Expansion Markets	Boston
Historic sites and landmarks	4.28	4.14	4.12
Family friendly	4.23	4.05	3.97
A safe place to visit	4.04	3.94	3.93
Cultural attractions	3.94	3.84	3.90
Unique experiences	3.93	3.78	3.84
A place with a welcoming culture	3.90	3.76	3.69
A fun destination	3.84	3.69	3.64
Unique local dining	3.73	3.59	3.57
An open-minded place	3.65	3.56	3.52
Has unexpected attractions and activities	3.64	3.56	3.52
A place that celebrates diversity	3.51	3.41	3.51
An exciting destination	3.68	3.52	3.50
A place with a forward thinking, innovative culture	3.48	3.38	3.49
Shopping	3.65	3.59	3.45
Black history sites and landmarks	3.38	3.40	3.45

Industry Benchmark:
4.0+ Excellent
3.75-3.99 Good
3.50 – 3.74 Average
< 3.5 Below Average

# APPENDIX: QUESTIONNAIRE

**Williamsburg Tourism Council**  
**Tracking Study Questionnaire Wave 9 - ROI**  
**January 2022**

**SCREENER MODULE**

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

S1. Who in your household is primarily responsible for making decisions concerning travel destinations?

1. Me
2. Me & my spouse/other
3. Spouse/other **TERMINATE AT END OF SCREENERS**

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.		
<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>		<b>TERMINATE AFTER SCREENING QUESTIONS</b>
I engage in skiing, snowmobiling, and/or other outdoor winter activities		
I use video streaming services like Hulu or Netflix.		
I am currently planning or have already planned an upcoming leisure trip		

S3. What is your age? \_\_\_ **TERMINATE AFTER SCREENING QUESTIONS IF < 18**

D7. What is your race/ethnicity?

- White
- Black/African American Q=200 MINIMUM
- Asian
- Native Hawaiian/Pacific Islander
- American Indian/Native Alaskan
- Two or more

SET QUOTA OF 10% BLACK/AFRICAN AMERICAN EACH MONTH (50 OUT OF 500).

S4. Here are some statements about your attitudes toward vacation travel – please indicate how much you agree or disagree with each statement.

	Disagree completely	Disagree somewhat	Agree somewhat	Agree 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				

Strategic Marketing & Research Insights.

1

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.					
I seek out unique local dining options on my trips					
I shop at locally owned stores on my trips					

**IMAGE MODULE**

I1. What places come to mind when thinking about leisure destinations where you can experience U.S. history and culture?  
 FIVE TEXT BOXES

I2. What places come to mind when thinking about leisure travel destinations with theme parks?  
 FIVE TEXT BOXES

I3. 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				
Charleston, SC				

I4. 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						

Strategic Marketing & Research Insights.

2

Washington, DC, area – including the Smithsonian museums, National Zoo, Capitol Hill, Georgetown University					
Hershey, PA – including The Boardwalk at Hersheypark					
Charleston, SC					

I5. Please rate the Williamsburg, VA, area for each of the following:

ROTATE	1 Poor	2	3	4	5 Excellent
Historic sites and landmarks					
Shopping					
Family friendly					
Unique local dining					
Cultural attractions					
Black history sites and landmarks					
A place with a welcoming culture					
A place that celebrates diversity					
An open-minded place					
A place with a forward thinking, innovative culture					
A safe place to visit					
Unique experiences					
A fun destination					
Has unexpected attractions and activities					
An exciting destination					

**TRAVEL MODULE**

T1. How likely are you to visit the Williamsburg, VA, area in the next year? The Williamsburg, VA, area includes Colonial Williamsburg, Busch Gardens, Williamsburg shopping centers/outlets, Jamestown, and Yorktown.

- Not at all likely
- Not very likely
- Somewhat likely
- Very likely
- Already planning a trip

ASK T1A IF VERY LIKELY OR ALREADY PLANNING A TRIP

T1a. When do you plan to visit the Williamsburg, VA, area?

January 2022	
February 2022	
March 2022	
April 2022	
May 2022	
June 2022	
July 2022	
August 2022	
September 2022	
October 2022	
November 2022	
December 2022	
January 2023	

Strategic Marketing & Research Insights.

3



T2. Have you visited the Williamsburg, VA area in the past year?

- Yes
- No

T3b. When did you visit the Williamsburg, VA area? Select all that apply.

January 2021	
February 2021	
March 2021	
April 2021	
May 2021	
June 2021	
July 2021	
August 2021	
September 2021	
October 2021	
November 2021	
December 2021	
January 2022	

IF VISITED WILLIAMSBURG IN THE PAST YEAR FROM T2, ASK T3-T10 ABOUT THEIR TRIP. OTHERWISE, SKIP TO AD AWARENESS MODULE.

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

T3. 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

T3a. In the course of planning your trip 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	
Digital display advertising	
Other, please specify	
Did not gather information	

Strategic Marketing & Research Insights.

4

T3c. 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

T4. How many nights did you spend in the Williamsburg, VA, area? \_\_\_\_\_

ASK T5 IF T4 >= 1

T5. 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 \_\_\_\_\_

T6. Including yourself, how many people were on this trip? \_\_\_\_\_

ASK T7 IF T6 > 1

T7. How many children under the age of 18 years old were in your travel party? \_\_\_\_\_

T8. Which of the following attractions and activities did you visit or do as part of your most recent trip? Select all that apply.

[ROTATE]

- 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 Pottery
- Eco Discovery Park
- Go Ape Zip Line and Treetop Adventure
- Williamsburg Botanical Gardens
- Go Karts Plus
- Ripley's Believe It or Not!
- Art galleries
- Dining at unique local restaurants
- Outlet shopping

Strategic Marketing & Research Insights.

5

- Shopping at locally owned stores
- Museums
- Golf
- Mini-golf
- Outdoor recreation (parks, trails, waterways)
- American Revolution Museum at Yorktown
- Colonial Williamsburg paid/ticketed activities

ONLY SHOW THE ACTIVITIES THEY CHOSE IN T8 AND ASK:

T9. 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.

T10. 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...

NOTE -- SPENDING CATEGORIES WERE CHANGED TO ALIGN WITH DEAN RUNYAN DATA.

Accommodations (includes campground fees)	_____
Food and beverage service	_____
Food stores	_____
Local transportation & gasoline	_____
Arts, entertainment & recreation	_____
Retail sales	_____
Visitor air (airfare)	_____
Other	_____
<b>Total</b>	<b>SHOW TOTAL</b>

Strategic Marketing & Research Insights.

6

## AD AWARENESS MODULE

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

### ROTATE APPEARANCE OF MEDIA.

ROTATE ONE VIDEO FROM EACH SEGMENT...

#### VIDEO

!:\Ads Master\Williamsburg\2020 Ad Effectiveness & ROI\USE\Video

#### ASK AWARENESS OF EACH VIDEO AD

Culture Questers: Explore. At your pace.

<https://vimeo.com/connellypartners/review/430781106/64743454e0>

!:\Ads Master\Williamsburg\2021 Ad Effectiveness & ROI\Videos

Culture Questers: Spring Break

<https://player.vimeo.com/video/601084983>

Simple Strivers: Connect. At your pace.

<https://vimeo.com/connellypartners/review/428210114/cf57d66a>

!:\Ads Master\Williamsburg\2021 Ad Effectiveness & ROI\Videos

Simple Strivers: Spring Break

<https://player.vimeo.com/video/601091978>

See-ers and Do-ers: Discover. At your pace.

<https://vimeo.com/connellypartners/review/428209570/0817db7cd>

!:\Ads Master\Williamsburg\2021 Ad Effectiveness & ROI\Videos

See-ers and Do-ers: Spring Break

<https://player.vimeo.com/video/601088467>

#### ASK A1 FOR EACH VIDEO AD

A1. Have you seen this ad before?

Yes

No

#### DIGITAL BANNER

Holiday 2021

!:\Ads Master\Williamsburg\2021 Tracker\November 2021\FY22 Holiday Display Banners\Display Banners\USE



#### SPRING BREAK AMUSEMENT

!:\Ads Master\Williamsburg\2021 Tracker\LAYP Amusement



#### SPRING BREAK FOOD AND BEVERAGE

!:\Ads Master\Williamsburg\2021 Tracker\LAYP Food & Bev



#### FALL 2021/Q1 2021 FOOD AND BEVERAGE

!:\Ads Master\Williamsburg\2021 Ad Effectiveness & ROI\SMARI\SMARI\USE Food and Beverage

ASK INDIVIDUAL AWARENESS FOR THESE TWO ADS



#### FALL 2021/Q1 2021 History

!:\Ads Master\Williamsburg\2021 Ad Effectiveness & ROI\SMARI\SMARI\USE History

ASK INDIVIDUAL AWARENESS FOR THESE TWO ADS



#### SPRING BREAK OUTDOORS

!:\Ads Master\Williamsburg\2021 Tracker\LAYP Outdoors



#### FALL 2021/Q1 2021 Outdoors

!:\Ads Master\Williamsburg\2021 Ad Effectiveness & ROI\SMARI\SMARI\USE Outdoors



21-wc-0312\_fy2fall\_static\_outdoor\_book\_300x250



21-wc-0312\_fy2fall\_static\_outdoor\_plan\_160x600

October 2021

!:\Ads Master\Williamsburg\2021 Tracker\October 2021\Amusement Banners



21-wc-0312\_fy2fall\_static\_amusement\_book\_728x90

ASK A2 FOR EACH SET OF DIGITAL ADS

A2. Have you seen any of these ads before?

Yes

No

!:\Ads Master\Williamsburg\2021 Ad Effectiveness & ROI\SMARI\SMARI\Fall 2021\PANDORA\USE



21-wc-0312\_fy2fall\_pandora\_csl\_300x250



21-wc-0312\_fy2fall\_pandora\_csl\_300x250

A2a. Have you seen any of these ads on Pandora before?

Yes

No

SOCIAL INFLUENCER

ASK IF USE SOCIAL MEDIA AT 52

ASK EVERYONE ALL THE NEW ADS, SKIP TO NEXT MEDIUM IF AWARE OF ANY SOCIAL ADS AFTER ALL NEW SOCIAL ADS ARE SHOWN.

!:\Ads Master\Williamsburg\2021 Tracker\November 2021\FY22 Holiday Display Banners\Social

Strategic Marketing & Research Insights.

10



WTC In-feed 1



WTC In-feed 2



WTC In-feed 3



WTC Social Story

!:\Ads Master\Williamsburg\2021 Tracker\October 2021\Social Units



21-wc-0312\_fy2fall\_FB\_C\_Landmark\_1000x1000



21-wc-0312\_fy2fall\_FB\_C\_History\_1000x1000



21-wc-0312\_fy2fall\_FB\_C\_Amusement\_1000x1000



21-wc-0312\_fy2fall\_FB\_C\_Outdoor\_1000x1000

!:\Ads Master\Williamsburg\2021 Tracker\October 2021\Social Units\FACEBOOK STORIES



21-wc-0312\_fy2fall\_FB\_story\_amusement\_1000x1000



21-wc-0312\_fy2fall\_FB\_story\_landmark\_1000x1000



21-wc-0312\_fy2fall\_FB\_story\_history\_1000x1000



21-wc-0312\_fy2fall\_FB\_story\_outdoor\_1000x1000

!:\Ads Master\Williamsburg\2021 Ad Effectiveness & ROI\January 2022\Social



FB SP1



FB SP2



Social Banner 1



Social Banner 2



Social Banner 3



Social Culture Quarters



Social Simple Strivers

!:\Ads Master\Williamsburg\2021 Ad Effectiveness & ROI\January 2022\Social\Tor

Strategic Marketing & Research Insights.

11



Tori1



Tori2

!:\Ads Master\Williamsburg\2021 Ad Effectiveness & ROI\January 2022\Social\Julia



Julia1



Julia2

!:\Ads Master\Williamsburg\2021 Ad Effectiveness & ROI\January 2022\Social\Dustin & Burton



Dustin1



Dustin2



Dustin3



Dustin4



Dustin5

ASK A3 FOR EACH AD/SET OF SOCIAL INFLUENCER POSTS

A3

WORDING FOR SET:

Have you seen any of these social media influencer posts before?

Yes

No

WORDING FOR INDIVIDUAL POST:

Have you seen this social media influencer before?

Yes

No

Strategic Marketing & Research Insights.

12

WORDING FOR NEW SOCIAL ADS FOR OCTOBER 2021

Have you seen this social media ad before?

- Yes
- No

COVID-19 PERCEPTIONS MODULE

CV1a. Which of the following have you done in response to the COVID-19 pandemic?

Select all that apply.

- Spent less on leisure travel than usual
- Traveled closer to home
- Cancelled a leisure trip
- Chose a domestic destination rather than an international one
- Chose to drive to a destination rather than fly
- Chose outdoor over indoor activities
- Took day trips instead of overnight trips
- Took advantage of a discount on a flight, hotel, or attraction
- Shortened a leisure trip
- Took fewer leisure trips than usual
- Postponed a leisure trip
- Visited friends or relatives rather than take a "regular" vacation
- Visited a rural destination instead of an urban destination
- I did not alter my travel behavior in response to COVID-19

CV1. Are you currently planning any leisure travel?

- Yes
- No

CV2. How much do you agree with the following statements given the 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					
It is irresponsible to travel right now					
I feel like I need to get away now more than ever					
I am more comfortable visiting a place with a mask mandate					
I am more comfortable visiting a place with a high vaccination rate					
I am comfortable visiting indoor attractions if there is a mask mandate					
I am comfortable visiting indoor attractions in a place with a high vaccination rate					
I am more comfortable visiting places where proof of vaccination is required					

CV3. Which of the following describes your plans for the COVID-19 vaccine?

- I have received the vaccine
- I plan to get the vaccine
- I do not plan to get the vaccine
- Prefer not to answer

ASK IT CV3 = 1

CV4. Which of the following describes your plans for the COVID-19 vaccine booster?

- I have received the booster
- I plan to get the booster
- I do not plan to get the booster
- Prefer not to answer

FLASH MODULE

THIS SECTION IS RESERVED FOR SPECIAL QUESTIONS THAT ARISE SUCH AS PR AWARENESS

DEMOGRAPHICS MODULE

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

DO NOT FORCE DEMOS

D1. Are you currently...?  
 Married/With partner  
 Single (never married)  
 Divorced  
 Widowed

D2. Including yourself, how many people are currently living in your household? \_\_\_\_

ASK D3 IF D2 > 1

D3. How many children under the age of 18 live in your household? \_\_\_\_

D4. 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

D5. 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

D6. What is your preferred gender identity...?

- Male
- Female
- Other
- Prefer not to answer

D7. Do you identify as LGBTQ+?

- Yes
- No
- Prefer not to answer