

Visit
WILLIAMSBURG
JAMESTOWN ▼ YORKTOWN

2023 Ad Effectiveness Research

January 2024

SMARInsights

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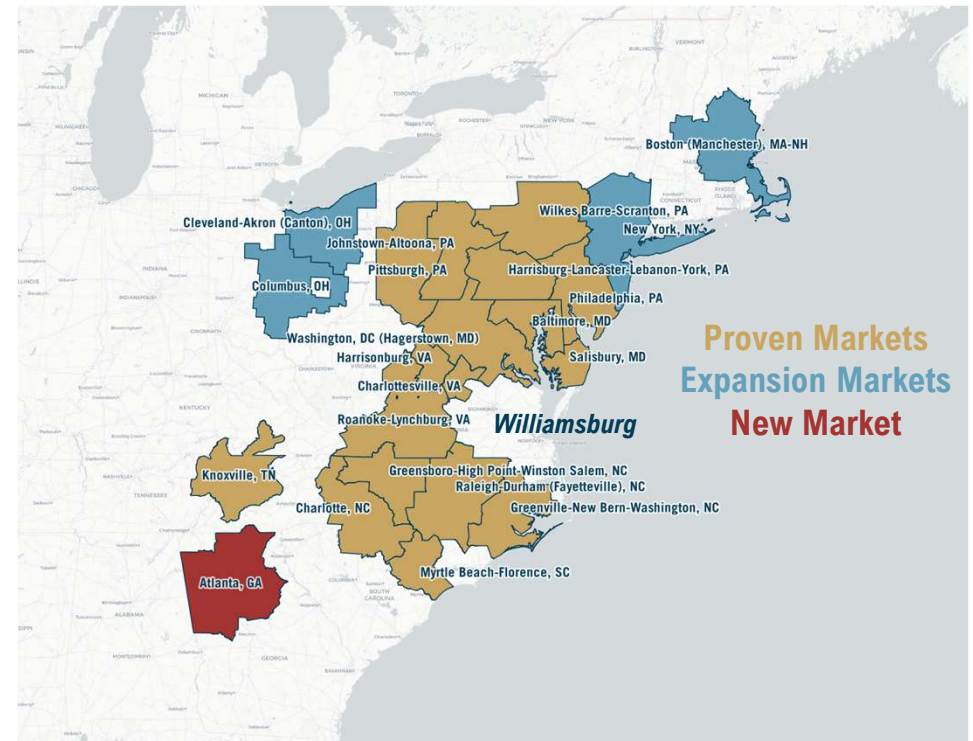
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Background & Objectives

- The Williamsburg Tourism Council (WTC) uses paid promotional efforts to encourage travel to the area.
- To help be accountable for the resources invested in these efforts, WTC has retained Strategic Marketing & Research Insights (SMARInsights) to measure the reach and influence of this marketing.
- This research wave evaluates the advertising that ran from January through October 2023.
- The specific objectives of this research are to:
 - Gauge advertising awareness
 - Assess advertising influence
 - Review the travel and competitive environment

Methodology

- Data collection was conducted via an online survey so that consumers could view the actual advertising. This provides a representative measure of aided ad recall.
- A total of 1,502 surveys were completed between November 27th and December 5th, 2023.
- The research was conducted among leisure travelers in the markets shown on the map.
- 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 distribution.



Media Investment

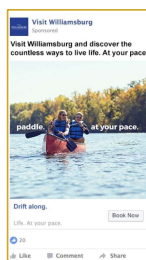
- WTC ran ads from January through October 2023. In total, WTC invested \$11.8 million on the advertising campaign. The spending was greatest for ads placed January through March (\$5.8 million), while \$3.2 million was invested from April to June and \$2.8 million from July to October. The final segment of spending did not include out of home.
- Samples of the ads are shown below. The entire collection of ads tested can be found in the questionnaire in the appendix.



Sample Video Ad



Sample Pandora Ad



Sample Social Ad



Sample Digital Ad

Channel	Jan. - March 2023	April - June 2023	July - Oct. 2023	Total
Broadcast	\$1,858,788	\$1,385,720	\$1,073,732.52	\$4,318,241
CTV	\$309,375	\$140,125	\$207,094.09	\$656,594
Total Linear TV/CTV	\$2,168,163	\$1,525,845	\$1,280,826.61	\$4,974,835

Digital Banner	\$975,282	\$599,867	\$670,396.80	\$2,245,546
Digital Video	\$131,381	\$99,694	\$61,675.25	\$292,750
PPC	\$171,188	\$80,729	\$120,104.83	\$372,022
Total Digital Banner/Video (Includes PPC)	\$1,277,850	\$780,290	\$852,177.88	\$2,910,318

Social	\$242,344	\$117,948	\$228,458.08	\$588,750
Influencer Content	\$31,250	\$103,942	\$217,000.00	\$352,192
Total Social/Influencer Content	\$273,594	\$221,890	\$445,458.08	\$940,942

Out of Home	\$1,674,500	\$475,000	\$0.00	\$2,149,500
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Streaming Audio (Pandora)	\$206,250	\$42,917	\$181,782.07	\$430,949
Podcasts	\$231,417	\$120,463	\$15,969.20	\$367,849
Total Streaming Audio & Podcasts	\$437,667	\$163,380	\$197,751.27	\$798,798

Total	\$5,831,774	\$3,166,405	\$2,776,213.84	\$11,774,393
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Insights

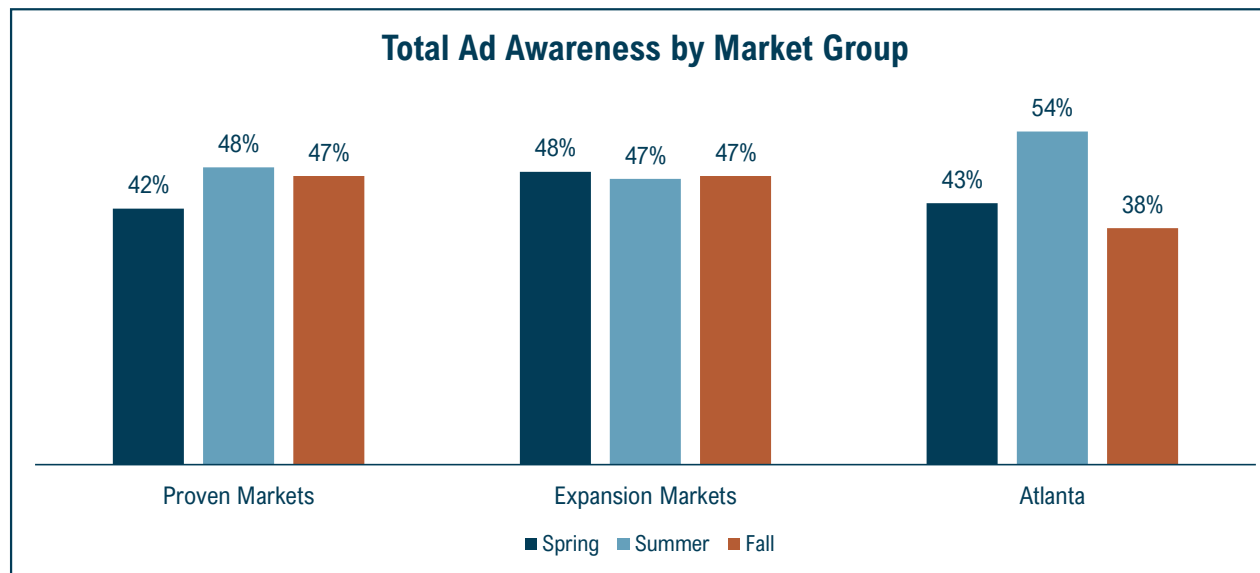
- The 2023 advertising campaign ran from January to October 2023 and influenced travel to the Williamsburg area from all target markets. The addition of the Atlanta market and the inclusion of new, smaller markets to the Proven Markets group aided in the growth of total ad-aware households (+13%). This growth ultimately impacted 537,000 households to visit (the most in recent years). With an average trip spend of \$1,224, the campaign influenced \$657 million in visitor spending. This results in a return of \$56 for each \$1 invested in the media buy.
- Including new markets is productive in adding trips but less so in improving the quality of trips. The 2023 campaign targeted 32% more households than in 2022. This expanded base of targeted households allowed for growth of ad-aware consumers (13%). With an increment of nearly 5%, influenced trips increased by 24%. However, newly informed consumers spend less, as evident by the decline in average trip spending (-37%). Even with an increase of 105,000 influenced trips, the total visitor spend in 2022 was 21% greater than in 2023. Continued advertising in these new markets will yield greater success over time as spending improves with more informed travelers.
- In an effort to allow for extra comparability to other data sources utilized by WTC, SMARInsights has included a second ROI calculation that incorporates a more restrictive visitor classification and weight to hotel accommodation demand as provided by WTC. Using this new approach, the incremental travel rate is lessened to 2.5%, which equates to \$378 million in visitor spending and a return of \$30 for every \$1 of media investment.
- 82% of trips were planned within three months or less of visiting. These trips were motivated by a variety of attractions and activities. Busch Gardens was the top motivator, followed by Colonial Williamsburg, Jamestown Settlement, and Historic Jamestowne. Many of the top motivators are in James City County, and half of overnight visitors report staying in lodging within the county. A quarter stayed in Williamsburg proper.
- Trips to Williamsburg declined over the course of the study period (October 2022 to November 2023), with the height of visitation to the area in April (14%). This is not likely due to the trip experience, as 95% of visitors are very satisfied with their visit to the area.

Advertising Awareness

This first section is a review of advertising awareness with comparisons to the prior 2023 waves.

Tracking Ad Awareness by Market Group

- The 2023 advertising campaign yielded similar levels of awareness in each of the three market groups.
- When considering the peak awareness throughout the three waves, recall of the advertising was highest in the newest market, Atlanta, during the summer pulse wave (54%). Just under half of travelers in both the Proven and Expansion markets were aware of the campaign.



Peak Ad Awareness & Ad-Aware Households

- In total, 48.6% of target market households were aware of the advertising. This translates to 11.3 million ad-aware households in 2023.
- Half of the ad-aware visitors reside in the Proven Markets group. Like their name suggests, advertising efforts have demonstrated to be successful year after year in this core group of markets.

	Proven Markets	Expansion Markets	New Market Atlanta	Total
Traveling HHs	11,465,969	9,713,738	2,066,197	23,245,904
Peak Ad Awareness	48.3%	47.7%	54.2%	48.6%
Ad-Aware HHs	5,543,568	4,630,083	1,120,227	11,293,878

Peak Ad Awareness & Ad-Aware Households Change

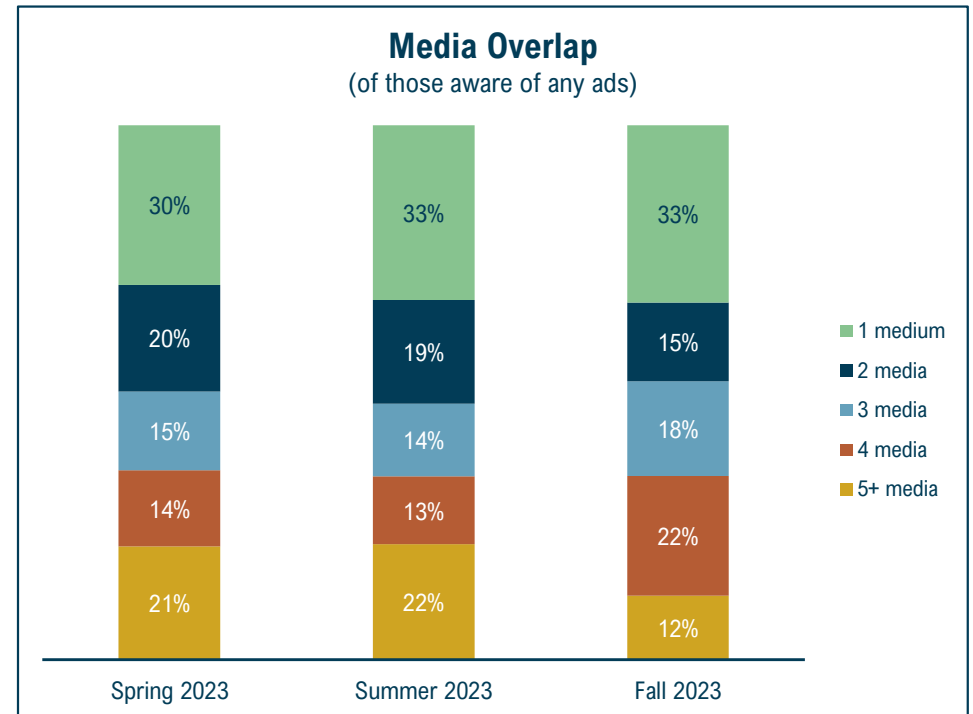
- The 2023 campaign extended its marketing reach to 32% more households than in the prior year. Attempting to connect marketing material with more travelers is challenging. This might explain the 15% decrease in advertising awareness. It is worth noting that achieving awareness beyond 50% has proven to be difficult among a majority of destination marketing organizations in recent years.
- Although 32% more households were targeted, many of them were in the Atlanta market. The Atlanta market is new in 2023 and does not benefit from consecutive years of media exposure. This indicates why the change in ad-aware households is much lower than the change in targeted ones.

	2021	2022 (Added New York & Boston)	2023 (Added several new markets*)	% Change
Traveling HHs	9,639,015	17,551,580	23,245,904	32%
Ad Awareness	46%	57%	49%	-15%
Ad-Aware HHs	4,435,601	10,021,731	11,293,878	13%

**New markets in 2023 include Atlanta, GA; Greensboro-High Point, NC; Harrisburg-Lancaster, PA; Johnstown-Altoona, PA; Knoxville, TN; Myrtle Beach, SC; Pittsburgh, PA; and Wilkes Barre-Scranton, PA*

Media Overlap

- Media overlap measures the amount of advertising media that each aware consumer recalls. Exposing potential visitors to a wide variety of media increases the likelihood that they will visit the destination.
- Ad-aware travelers reported very little differences season to season in the number of media they recall. The biggest change from summer to fall in the proportion of consumers exposed to 4 media and 5+ media. OOH was ended in June, which impacted these proportions.
- Most consumers recall at least 2 or more types of advertising media throughout the year.

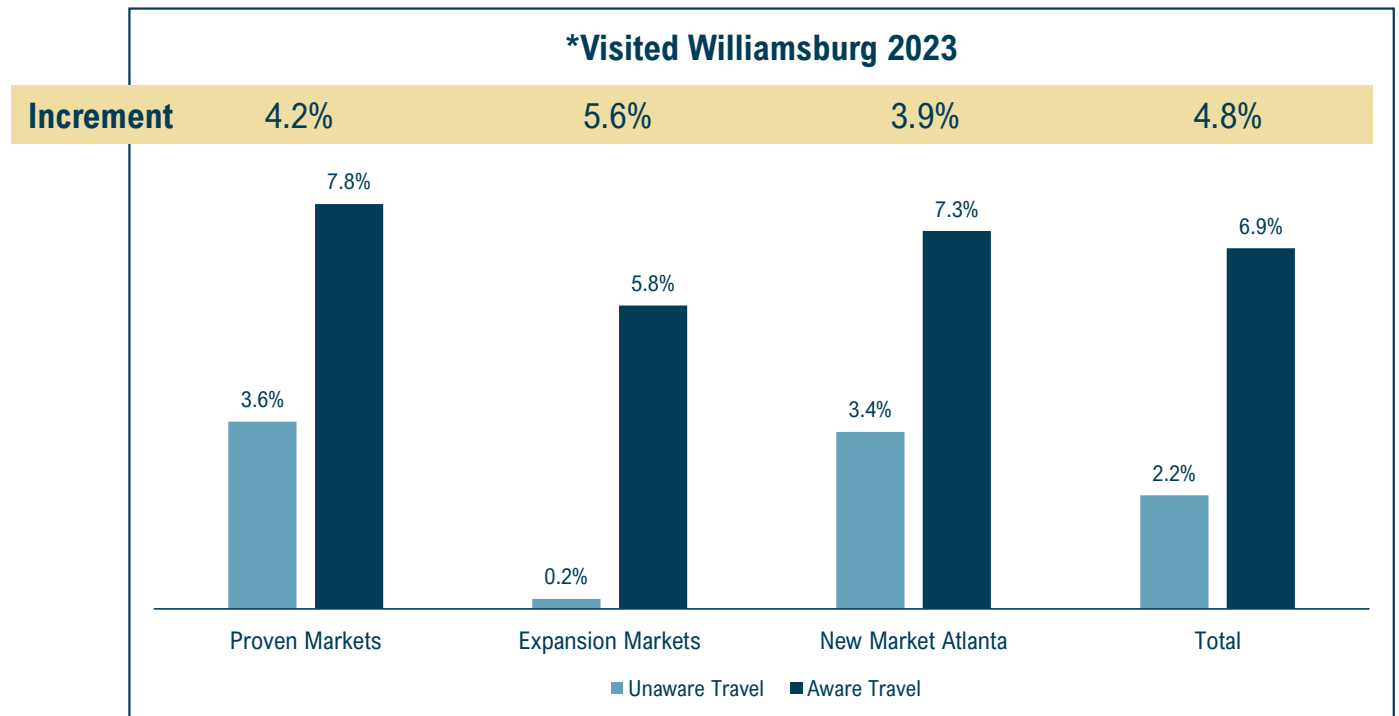


Advertising Impact & ROI

This section compares the rates of Williamsburg travel between the ad-aware and unaware consumers. The lift or “increment” observed among those aware of the ads is considered influenced by the advertising.

2023 Ad Impact on Travel

- The 2023 advertising campaign influenced travel from each of the three market groups.
- The Expansion Markets experienced the strongest travel increment among the three groups.
- Atlanta, the newest market, experienced a strong increment of 3.9% in its initial year.



**Not counting trips to visit family or friends*

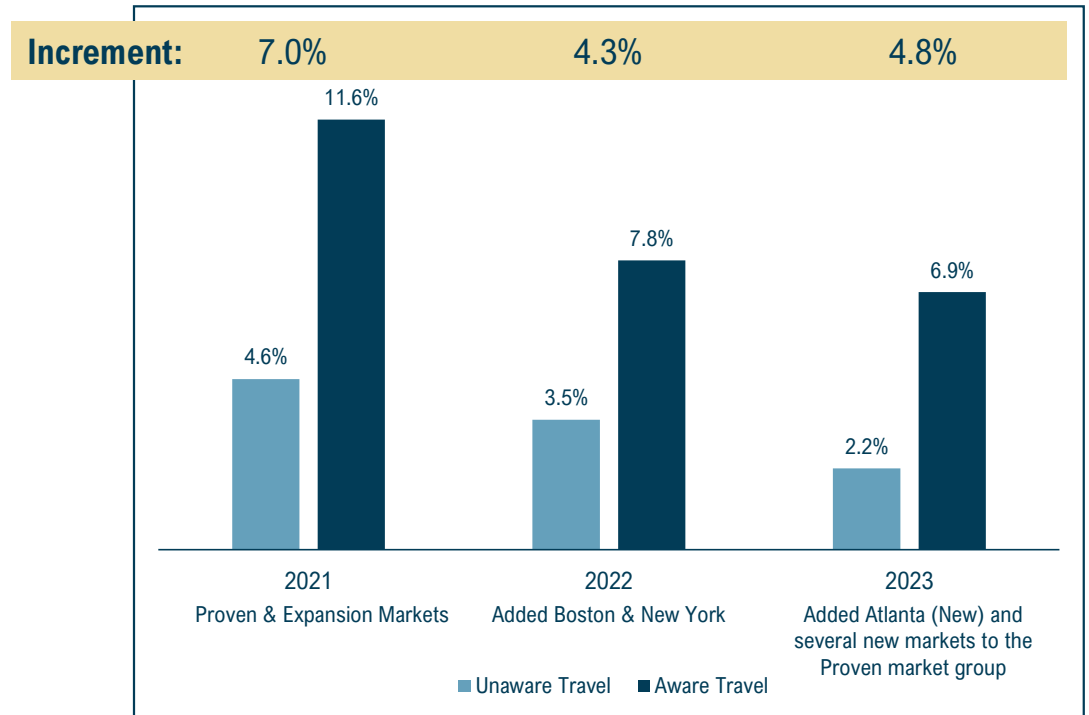
2023 Advertising Impact Calculation

- The advertising ultimately influenced about 537,000 trips to the Williamsburg area from January to November 2023.
- The average trip spending was \$1,224 per trip, resulting in a total ad-influenced sum of \$657 million.
- Considering the media investment of \$11.8 million, the visitor spending returned \$56 per \$1 invested in the media buy.
- The Proven and Expansion markets produced nearly the same amount of influenced visitor spending, while the Atlanta market generated roughly \$40 million in its inaugural year of advertising.

	Proven Markets	Expansion Markets	New Market - Atlanta	Total
Traveling HHs	11,465,969	9,713,738	2,066,197	23,245,903
Ad Awareness	48%	48%	54%	49%
Ad-Aware HHs	5,543,568	4,630,083	1,120,227	11,293,878
Incremental Travel %	4.2%	5.6%	3.9%	4.8%
Ad-Influenced Trips	232,344	261,549	43,282	537,174
Avg. Trip Spending	\$1,332	\$1,180	\$904	\$1,224
Ad-Influenced Trip Spending	\$309,543,131	\$308,627,082	\$39,117,241	\$657,287,453
Media Investment				\$11,774,393
ROI				\$56

Ad Impact on Travel Change

- 2023 proved to be another productive year of travel with a travel increment of nearly 5%. Despite lower awareness compared to the previous year, the market additions and continuation of a varied media plan contributed to a greater increment of travel.
- However, advertising in large markets such as Boston, New York, and Atlanta has its drawbacks. The baseline travel rate (by those unaware of the ads) is considerably lower and this impacts the total unaware travel.



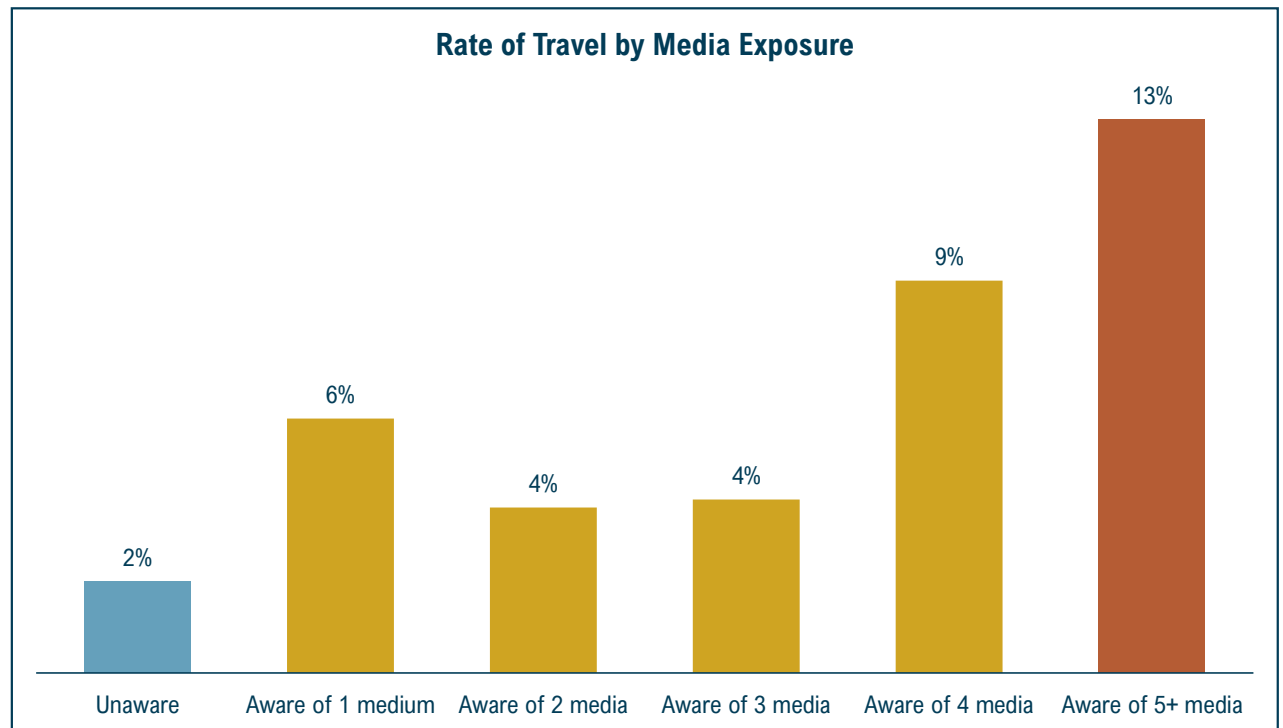
Economic Impact and ROI Change

- The table to the right illustrates the comparative change in advertising results over the course of three years. As mentioned earlier in the report, the 2023 campaign targeted 32% more travelers..
- The level of awareness remained elevated relative to the 2021 campaign, a positive finding. The total of ad-aware consumers increased by 13% as a result of a greater reach. With a 10% higher incremental travel rate, the advertising yielded a quarter more ad-influenced trips in 2023. This marks the second year of steady growth in total influenced trips to over half a million for the first time in the post-pandemic era.
- While there were more ad-influenced trips in 2023, trip spending was less on average (-37%), resulting in an aggregate trip spend of \$657 million (-21%). This impacted the return on investment for the campaign (ROI), which decreased by -23%.
- Ultimately, the 2023 campaign generated a higher volume of visits at the sake of quality trips. This is unsurprising considering the several new markets included in the campaign targeting. It will take consecutive years of continued advertising for these markets to mature and produce the higher quality trips associated with greater media exposure.

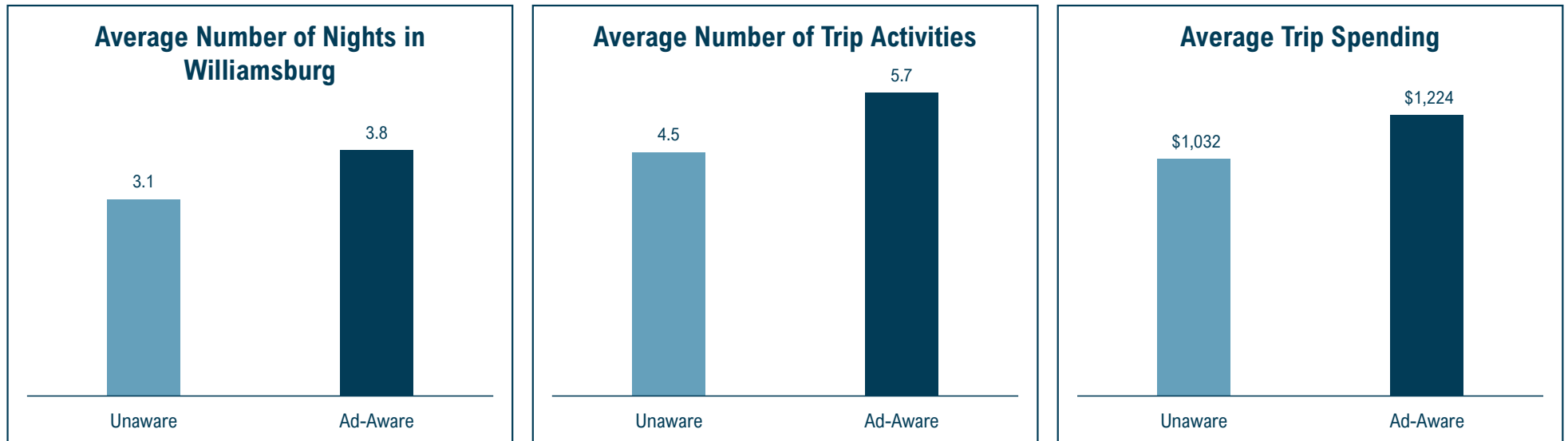
	2021	2022	2023	% Change from 2022
Traveling HHs	9,639,015	17,551,580	23,245,903	32%
Ad Awareness	46%	57%	49%	-15%
Ad-Aware HHs	4,435,601	10,021,731	11,293,878	13%
Incremental Travel %	7.00%	4.31%	4.76%	10%
Ad-Influenced Trips	310,718	431,564	537,174	24%
Avg. Trip Spending	\$1,307	\$1,928	\$1,224	-37%
Ad-Influenced Trip Spending	\$406,199,872	\$831,993,778	\$657,287,453	-21%
Media Investment	\$5,713,341	\$11,463,951	\$11,774,393	3%
ROI	\$71	\$73	\$56	-23%

2023 Media Overlap Impact

- The more types of media recalled, the better the travel rates. Two-thirds of ad-aware consumers consistently reported exposure to 2+ media over the year.
- Travel rates immediately increase with exposure to at least some facet of the campaign, and those aware of 4+ media traveled to Williamsburg a greater rate. This increases to 13% for those exposed to 5+ media.



2023 Ad Impact on the Trip



- Not only did the 2023 advertising campaign influence visits to the Williamsburg area, but the ads also changed trip behavior. Armed with greater knowledge of things to do, ad-aware consumers stayed longer, participated in more activities, and spent more during their visit.

Comparison of a more Restrictive ROI Methodology

- In an effort to add greater comparability to the other data sources utilized by WTC, SMARInsights developed a second, more restrictive criteria for defining a traveler to the Williamsburg area. The criteria is defined as follows:
 - Consumers who took an overnight trip to the area were excluded if they stayed in accommodations outside of James City County, York County, or Williamsburg proper (see map included in the questionnaire in the appendix).
 - Additionally, a secondary weight was applied that adjusts the visitor lodging location to be representative of Williamsburg's accommodations demand distribution for the same time period.
- These adjustments yield a more conservative incremental travel percentage (2.5%) resulting in \$357.7 million in visitor spending and a return of \$30 for each \$1 invested in advertising.

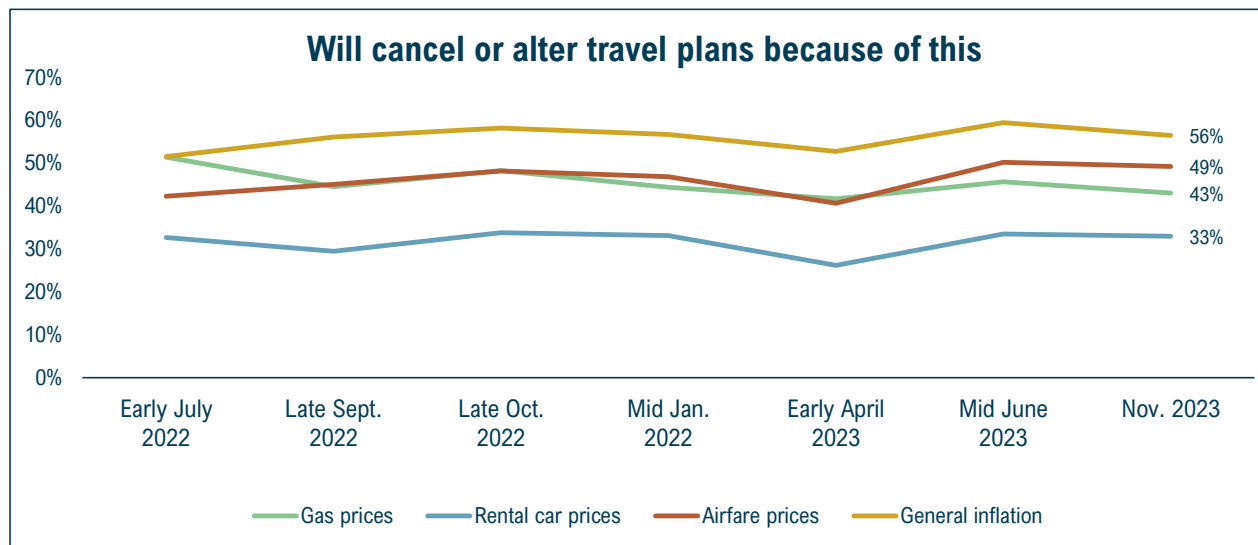
Comparison of Methodologies	Past Traveler Designation	➔ Stricter Travel Designation
Traveling HHs	23,245,903	23,245,903
Ad Awareness	49%	49%
Ad-Aware HHs	11,293,878	11,293,878
Incremental Travel %	4.8%	2.5%
Ad-Influenced Trips	537,174	285,304
Avg. Trip Spending	\$1,224	\$1,254*
Ad-Influenced Trip Spending	\$657,287,453	\$357,719,049
Media Investment	\$11,774,393	\$11,774,393
ROI	\$56	\$30

**The average trip spending was impacted by a lack of travel increment from the Atlanta market, who spent less on average.*

Price of Travel Perceptions Tracking

This section of the report tracks the results of the price-related questions in order to provide context regarding the leisure traveler mindset.

Price of Travel Impact

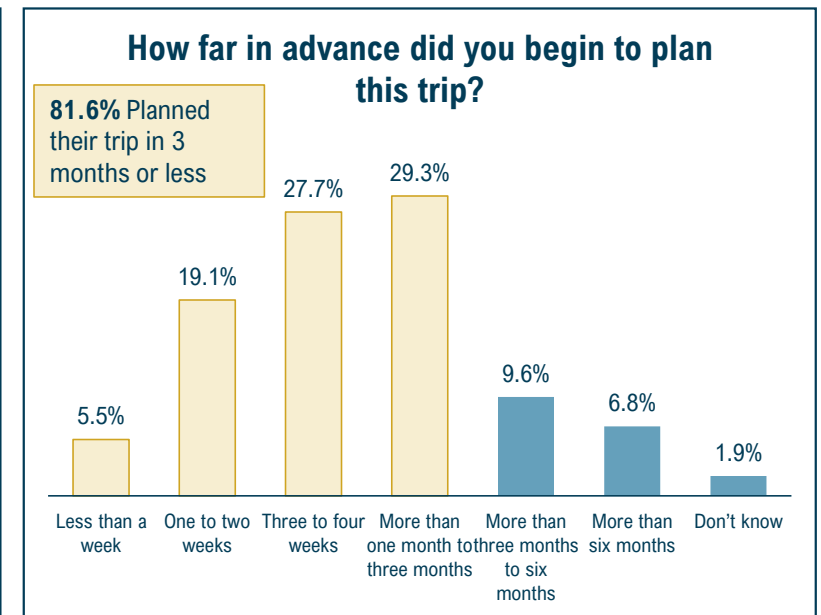
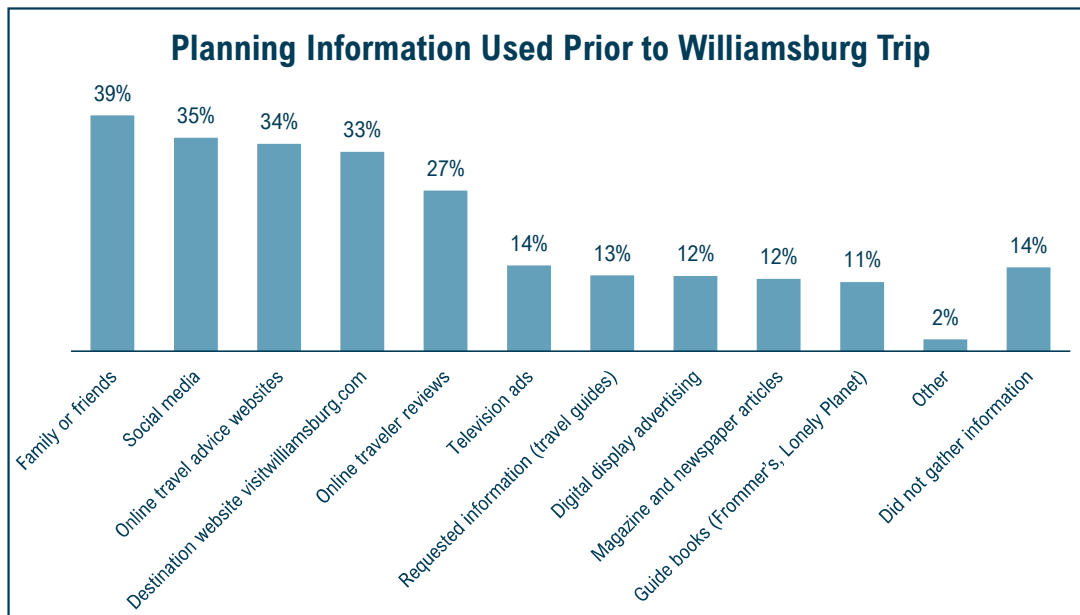


- Price sensitivity continues to play a role in impacting travel plans. As of this fall, the impact of gas prices appears to have declined while the other categories have remained elevated from the summer.

Visitor Profile

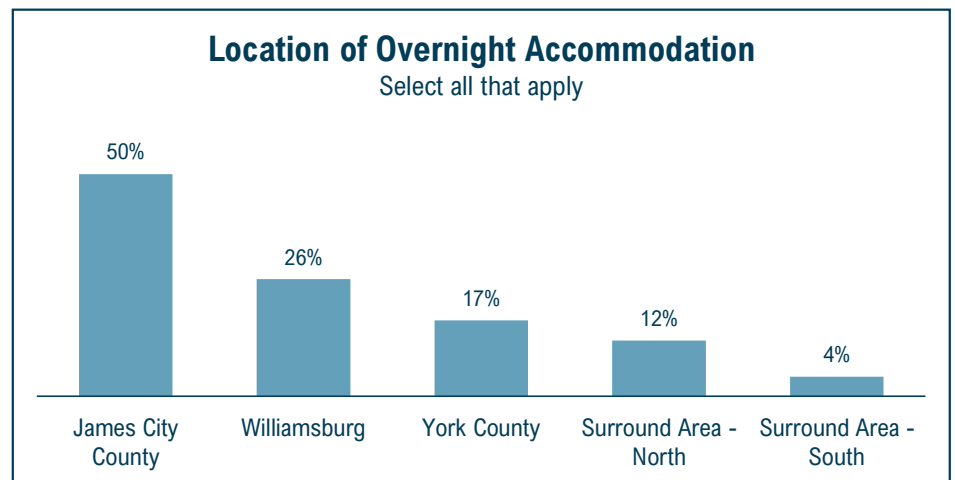
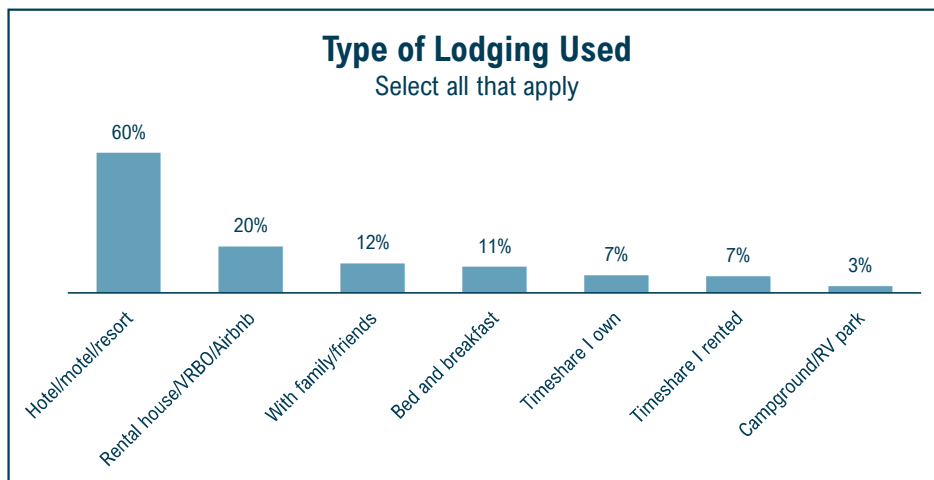
This final section of the report highlights trip behavioral patterns of visitors to the Williamsburg area.

Trip Planning



- The top source of trip planning information is friends and family (39%), and this is true for many destinations. Social media, online travel advice websites, and traveler reviews are used by a third or more visitors to Williamsburg.
- 81.6% visitors planned their trip to the Williamsburg area in three months or less before arriving.

Accommodations



**See reference map used in questionnaire in the appendix*

- A majority of visitors stay in hotels, motels, and resorts (60%), while rental properties are used by a fifth of travelers.
- Half of overnight visitors reported staying in James City County, with another quarter staying in Williamsburg proper.

Trip Composition



Average Trip Duration (Nights)	3.55
Average Trip Party Size	3.51
Trips with Children	46%

- 95% visitors are satisfied with their visit. Happy visitors influence potential ones, and this is a positive sign that travelers seeking out the destination are not disappointed.
- In terms of trip composition, almost half include children. The average trip lasts 3.6 nights and includes 3.5 people.

Activities & Attractions

- Busch Gardens motivated a quarter of visitors to visit the Williamsburg area. Colonial Williamsburg, the Jamestown Settlement, and Historic Jamestowne were the other top trip motivating attractions.
- Half of the overnights stayed in the James City County part of the area, which is the location of Jamestown and Busch Gardens.

Activity/Attraction	Participation	Motivation	Net Motivation
Busch Gardens Williamsburg	34%	77%	26%
Colonial Williamsburg's public areas not requiring a pass, such as Merchant Square, Duke of Gloucester Street, etc.	26%	59%	15%
Jamestown Settlement (Museum and recreation areas: fort, three ships, and Indian village)	28%	53%	15%
Colonial Williamsburg's ticketed areas such as the entrance to the Governor's Palace, the Capitol building and craft shops	20%	70%	14%
Historic Jamestowne (original National Park and Preservation Virginia site on island with archaeological dig, glassblowing, visitor center, and Archaearium)	28%	49%	14%
Yorktown Battlefield (part of Colonial National Historical Park)	20%	48%	10%
Water Country USA	14%	65%	9%
Williamsburg Winery	20%	41%	8%
Museums	31%	26%	8%
Great Wolf Lodge	13%	60%	8%
Williamsburg Pottery	17%	44%	8%
Shopping at locally owned stores	35%	21%	7%
Yorktown Victory Center (Museum and recreation areas: Continental Army encampment and 1780's farm)	16%	44%	7%
Art galleries	19%	34%	6%
Yorktown Riverwalk (including Schooner Alliance, Patriot Segway Tours, Waterman's Museum)	15%	41%	6%
Dining at unique local restaurants	33%	19%	6%
Outlet shopping	24%	25%	6%
Williamsburg Botanical Gardens	17%	34%	6%
Outdoor recreation (parks, trails, waterways)	18%	30%	5%
Colonial Williamsburg paid/ticketed activities	19%	28%	5%
College of William & Mary	12%	41%	5%
Local breweries	15%	31%	5%
Mini-golf	14%	31%	4%
Ripley's Believe It or Not!	11%	35%	4%
Golf	11%	23%	3%
Go Ape Zip Line and Treetop Adventure	5%	52%	3%
Go Karts Plus	9%	28%	2%
Eco Discovery Park	7%	32%	2%
American Revolution Museum at Yorktown	14%	8%	1%

Net Motivation = Participation x Motivated to Participate

Appendix

Questionnaire

Questionnaire

Williamsburg Tourism Council
C. Williamsburg 2023 Summer Pulse
June 2023

SCREENER MODULE

ZIP. What is your ZIP code? _____

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

- Me
- Me and my spouse/partner
- My spouse/partner **TERMINATE AT END OF SCREENERS**

S2. Please indicate which of the following describe you...

[ROTATE]	Yes	No
I regularly use social media like Facebook, X (formerly Twitter), Instagram or TikTok		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home.		TERMINATE AFTER SCREENING QUESTIONS
I am currently planning or have already planned an upcoming leisure trip		
I engage in skiing, snowmobiling, and/or other outdoor winter activities		
I use video streaming services like Prime Video, Disney+, AppleTV+, Netflix, Max or Hulu		

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

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 number 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 unique local dining options on my trips				
I shop at locally owned stores on my trips				
I like to golf while on vacation				

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1

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						
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					

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2

ROTATE	1 - Poor	2	3	4	5 - Excellent
A safe place to visit					
Unique experiences					
A fun destination					
Has unexpected attractions and activities					
An exciting destination					
Golf courses					

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?

November 2023	
December 2023	
January 2024	
February 2024	
March 2024	
April 2024	
May 2024	
June 2024	
July 2024	
August 2024	
September 2024	
October 2024	
November 2024	
December 2024	
January 2025	

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

- Yes
No

IF YES, ASK T3b

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

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

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3

Questionnaire

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, X (formerly Twitter), Instagram, etc.)	
Online traveler reviews	
Requested information such as travel guides	
Digital display advertising	
Other, please specify _____	
Did not gather information	

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/RBO/Airbnb
- Hotel/motel/resort
- Bed and breakfast
- Timeshare I own
- Timeshare I rented
- With family/friends
- Campground/RV park
- Other, please specify _____

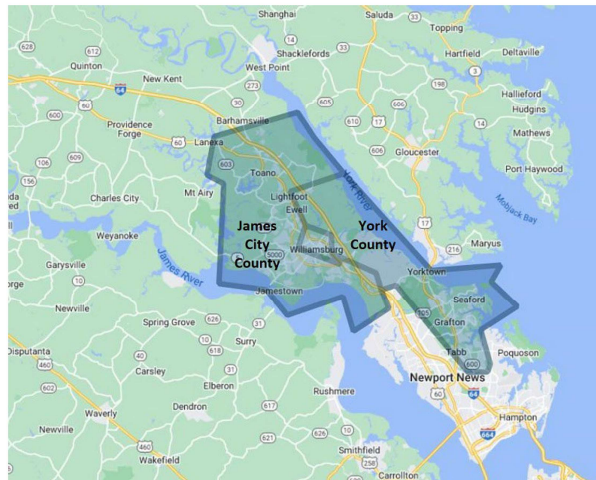
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4

ASK T5 IF T4 >= 1

INSERT MAP

T5A. Where were your overnight accommodations? Click area where you stayed.



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]

1. Colonial Williamsburg's public areas not requiring a pass, such as Merchant Square, Duke of Gloucester Street, etc.
2. Colonial Williamsburg's ticketed areas such as the entrance to the Governor's Palace, the Capitol building and craft shops
3. Jamestown Settlement (Museum and recreation areas: fort, three ships, and Indian village)
4. Yorktown Battlefield (part of Colonial National Historical Park)
5. Yorktown Victory Center (Museum and recreation areas: Continental Army encampment and 1780's farm)
6. Busch Gardens Williamsburg
7. College of William & Mary
8. Water Country USA

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9. Historic Jamestowne (original National Park and Preservation Virginia site on island with archaeological dig, glassblowing, visitor center, and Archaearium)
10. Great Wolf Lodge
11. Williamsburg Winery
12. Local breweries
13. Yorktown Riverwalk (including Schooner Alliance, Patriot Segway Tours, Waterman's Museum)
14. Williamsburg Pottery
15. Eco Discovery Park
16. Go Ape Zip Line and Treetop Adventure
17. Williamsburg Botanical Gardens
18. Go Karts Plus
19. Ripley's Believe It or Not!
20. Art galleries
21. Dining at unique local restaurants
22. Outlet shopping
23. Shopping at locally owned stores
24. Museums
25. Golf
26. Mini-golf
27. Outdoor recreation (parks, trails, waterways)
28. American Revolution Museum at Yorktown
29. Colonial Williamsburg paid/ticketed activities
 - None of these [EXCLUSIVE]

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 _____
- Total _____

SHOW TOTAL

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Questionnaire

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

VIDEO:

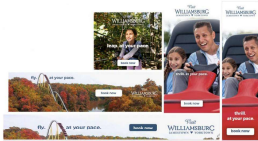
		
wtc_0500_sitetrffic_video-ctv_culture-quester-plan_30s https://vimeo.com/810289494	wtc_0500_sitetrffic_video-ctv_see-do-plan_30s https://vimeo.com/810289555	wtc_0500_sitetrffic_video-ctv_simple-striver-plan_30s https://vimeo.com/810289598

ASK A1 FOR EACH VIDEO AD

A1. Have you seen this ad before?

- Yes
- No

DIGITAL BANNER: AMUSEMENT

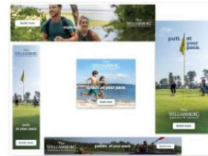


HISTORY



History Together

OUTDOORS



Outdoors Together



FOOD&BEV



Food&Bev Together



Digital1. Have you seen any of these online ads before?

- Yes
- No

PANDORA/STREAMING AUDIO:



PandoraSeersDoers <https://vimeo.com/811048958> PandoraSimpleStrivers <https://vimeo.com/811048803> PandoraCultureQuesters <https://vimeo.com/811048708>

Pandora1. Have you heard this ad before?

- Yes
- No

SOCIAL:



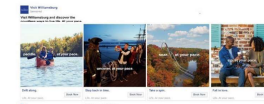
Social Static Post Together



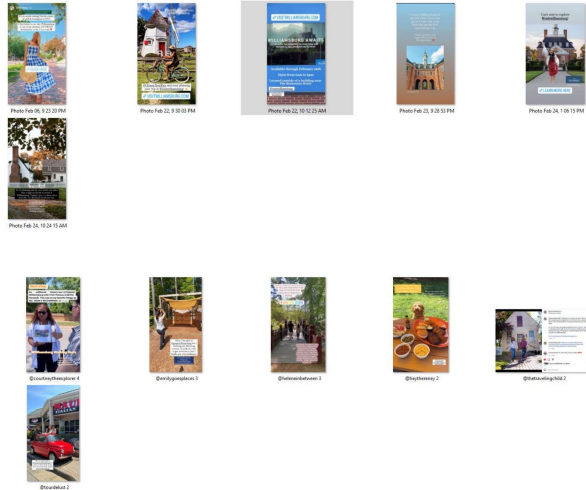
Social Posts Fall.jpeg



Social Stories Fall.jpeg



Questionnaire



Social1. Have you seen any of these social media ads before?
 Yes
 No

SOCIAL INFLUENCER VIDEOS:

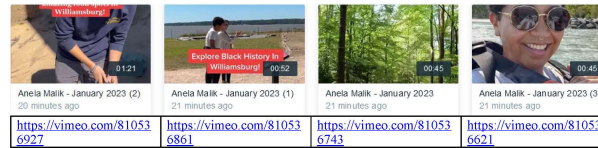
SHOW TO EVERYONE



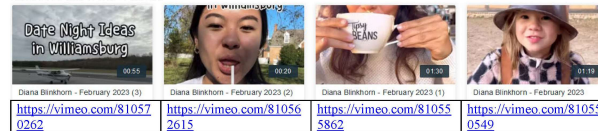
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RANDOMLY SHOW 1 OF 4 VIDEOS



RANDOMLY SHOW 1 OF 4 VIDEOS



RANDOMLY SHOW 1 OF 4 VIDEOS

Annie Jiang.mp4 885791531	Cynthia Andrew.mp4 885791639	Lauren Speed-Hamilton.MOV 885791999	Shay Spence - Adult's Guide.mp4 885792799	Shay Spence - Top Food & Restaurants.mp4 885793399
:14	:39 need to crop	:41	:38 need to crop	:33 need to crop

Social2. Have you seen this social media video before?
 Yes
 No

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OOH:

NYC:



NYC Together

Boston:



Boston Together

DC:



DC Together

Baltimore:



Baltimore Together

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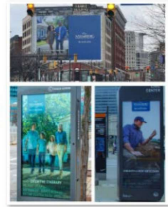
Questionnaire

Philadelphia:



Philadelphia Together

Cleveland:



Cleveland Together

OOH1. Have you seen any of these outdoor ads before?

- Yes
- No

CV1a. How have/will each of the following influence your leisure travel within the U.S.?

	Have/will cancel a trip because of this	Have/will alter travel plans because of this	Will have no impact
Gas prices			
Rental car prices			
Airfare prices			
General inflation			

DOI. The 250th anniversary of the signing of the Declaration of Independence is in 2026. How interested would you be in traveling to sites with historical significance during that year?

Not at all interested	Not very interested	Neutral	Somewhat interested	Very interested

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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 best describes your ethnic heritage? Are you...? Select all that apply. [ALLOW MULTI]

- American Indian or Alaska Native
- Asian
- Black
- Native Hawaiian or Other Pacific Islander
- White
- Other, please specify _____

D6. Do you identify as Hispanic or Latino? YES/NO

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

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