

Williamsburg Tourism Council

Tuesday, November 15, 2022

Visit
WILLIAMSBURG
JAMESTOWN ▼ YORKTOWN

Roll Call

James City County
Colonial Williamsburg Foundation
City of Williamsburg

Busch Gardens
Hotel/Motel Association
Jamestown Rediscovery
Jamestown/Yorktown Foundation
Restaurant Association
York County

Greater Williamsburg CoC
Virginia Tourism Corporation

Ruth Larson, Chair
Cliff Fleet, Vice Chair
Doug Pons, Treasurer

Kevin Lembke
Neal Chalkley
James Horn
Christy Coleman
Mickey Chohany
Chad Green

Mike Rock, Ex Officio
Rita McClenny, Ex Officio

Public Comment

- Limit to three minutes
- State name and address
- No Q & A

MMGY Global Briefing

Clayton Reid, CEO



Travel 2023

WHAT COULD POSSIBLY BE NEXT?

Visit
WILLIAMSBURG
JAMESTOWN ▼ YORKTOWN

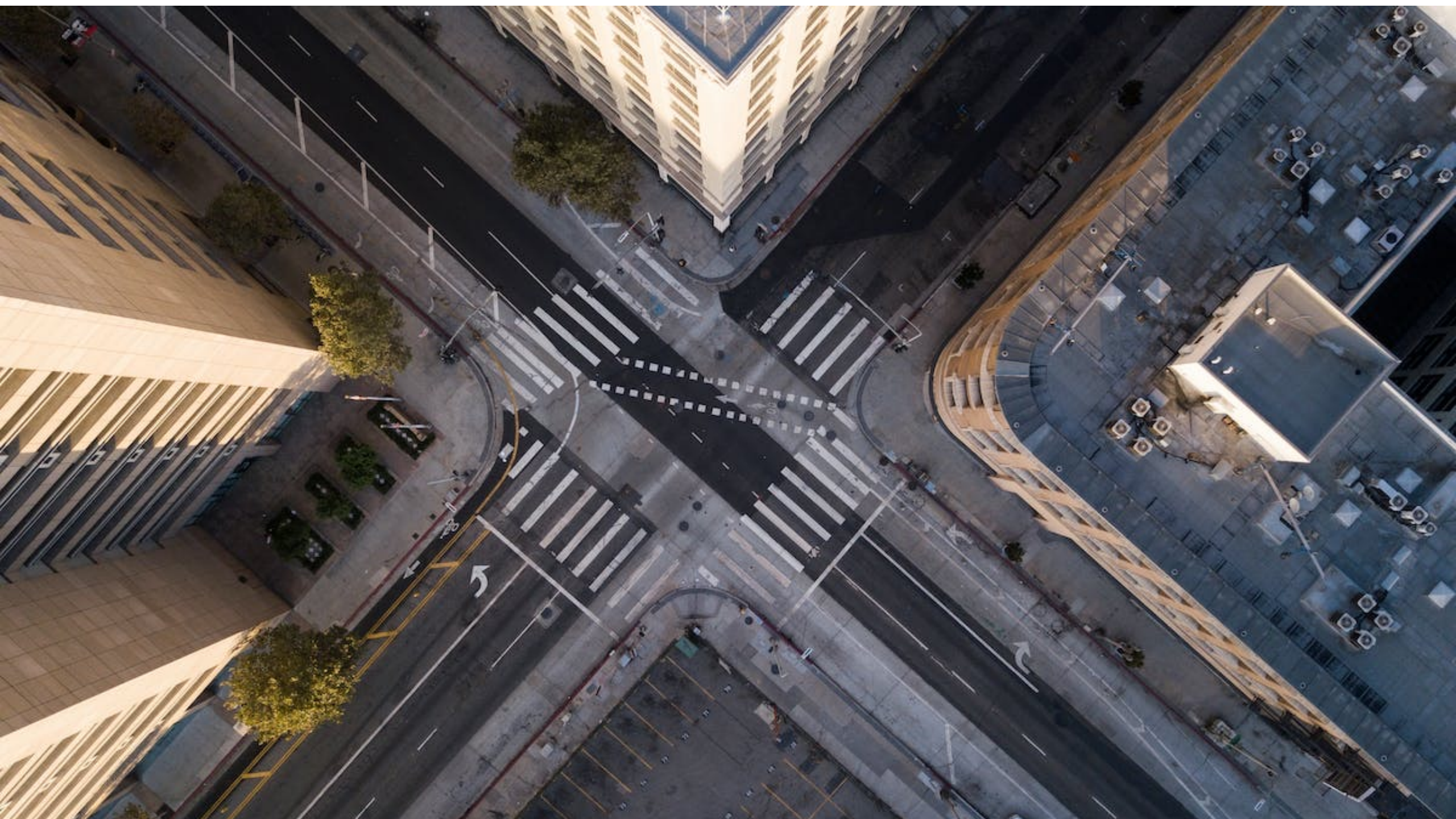
**MM
GY**
Global



NARRATIVE

Journalists Context Unreliable
Standards Narrative Mainstream
Pervasive Report **MEDIA BIAS** News
Events Stories Presentation
Advertisers Sources Fabricate
Liberal Mass Media Journalism Spin
Widespread Audience Country
Sensationalism Watchdogs Influence
Spinning Exaggeration Agenda Report
Facts Staff







TRAVEL • EDITORS' PICK

Google's Crackdown On Employee Trips Is Another Blow To Business Travel Recovery

Suzanne Rowan Kelleher Forbes Staff

I write about travel trends and news you can use.

Follow

Sep 8, 2022, 09:45am EDT



0

New!
Click on the conversation bubble to join the conversation
[Got it!](#)



#1

IMPORTANT MACRO CONDITIONS

INVEST IN YOU: READY. SET. GROW.

81% of U.S. adults are worried about a recession hitting this year, survey finds



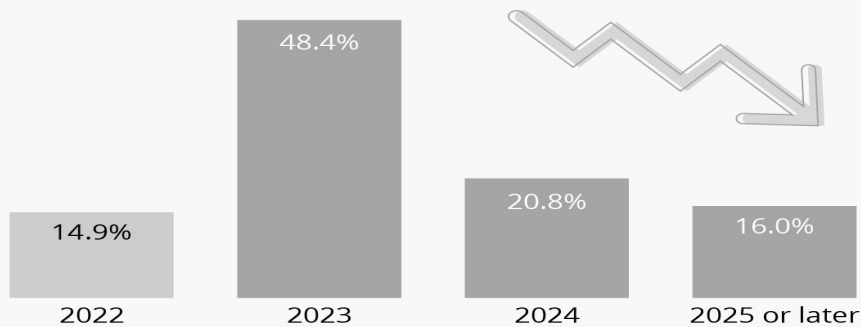
VIDEO 04:23

ODDS OF RECESSION IN NEXT YEAR?

Fed Survey: 57% of respondents say Fed efforts will cause recession

Cloudy With a Chance of Recession

Expected timing of the next U.S. recession according to investors



Based on a survey of 525 investors, both retail and professional, fielded between March 29 and April 1, 2022.
Source: Bloomberg MLIV Survey



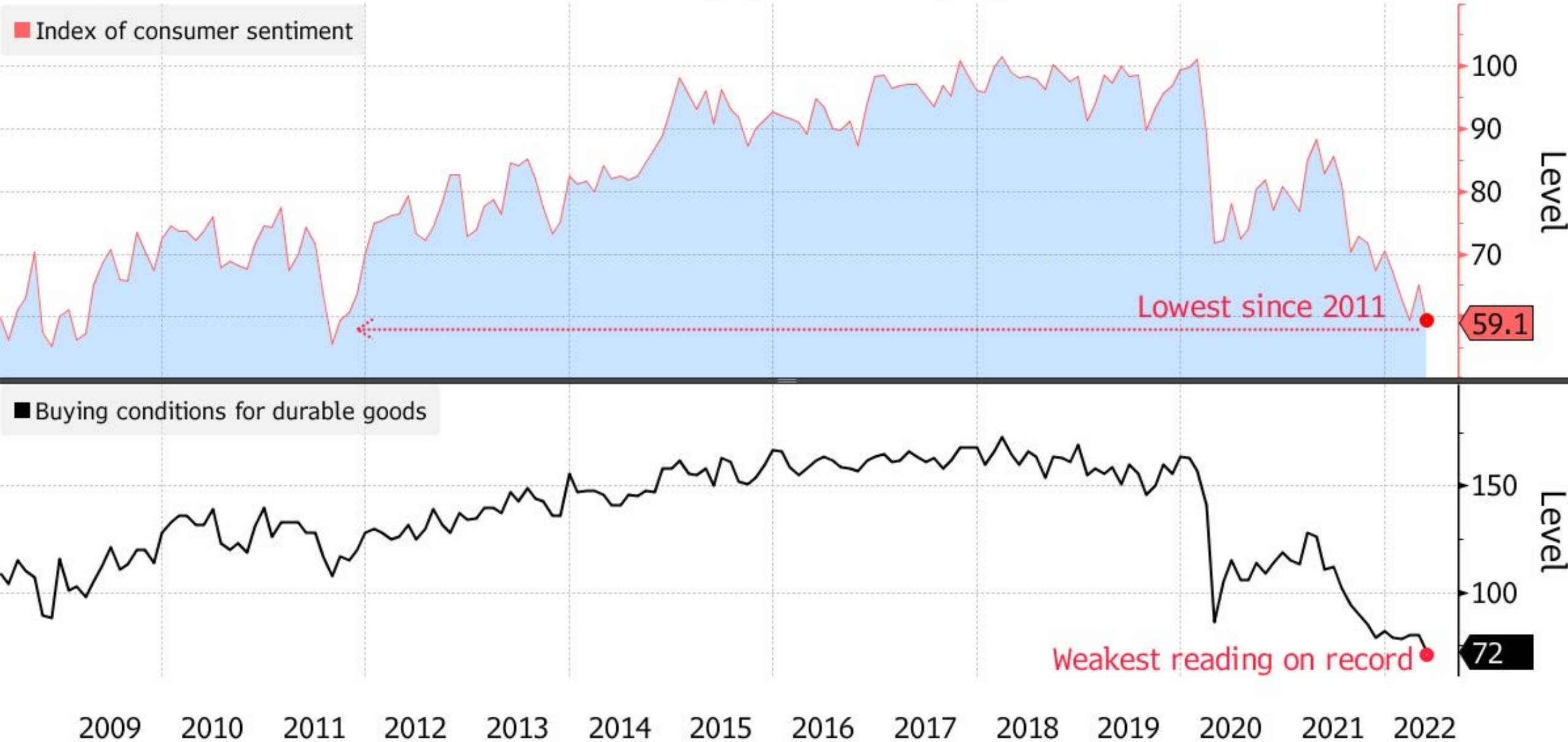
The background features a dark blue and black color scheme with various financial data elements. At the top, there are several rows of numbers, some in white and some in a lighter blue, including '453365', '112.47', '112.48', '4143874', '121.38', '121.40', '5782285', '16.63', '16.64', and '9008331'. On the left side, there is a red 'Edit' button and a 'Table' label. In the bottom right, there is a line graph with a red trend line and a bar chart with a vertical axis labeled 'JdK R\$' and values '100', '100.00', '80', and '99.50'.

Bloomberg Surveillance

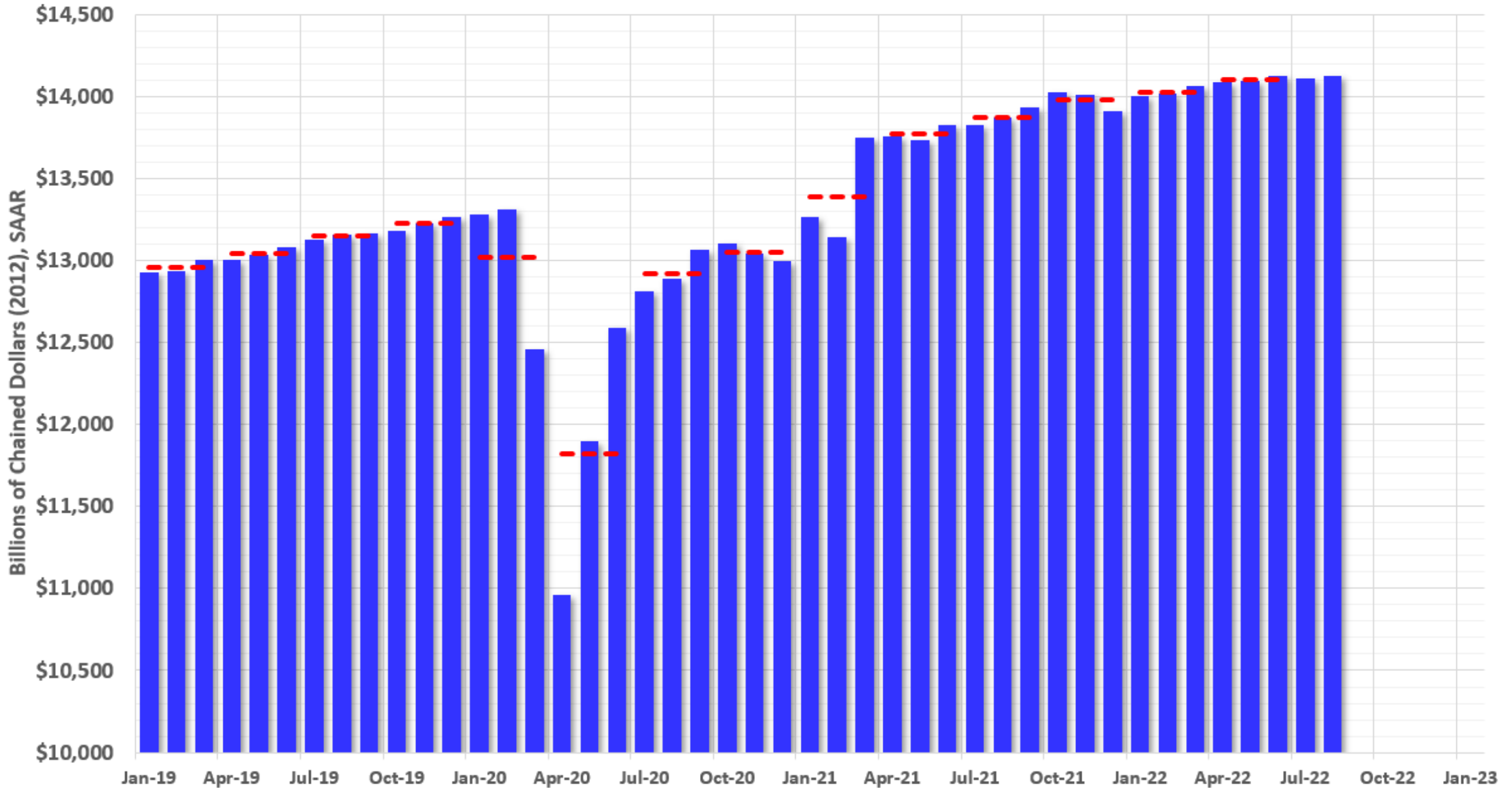
EARLY EDITION

Inflation's Toll

Gauge of US consumer sentiment slumps, while buying conditions deteriorate

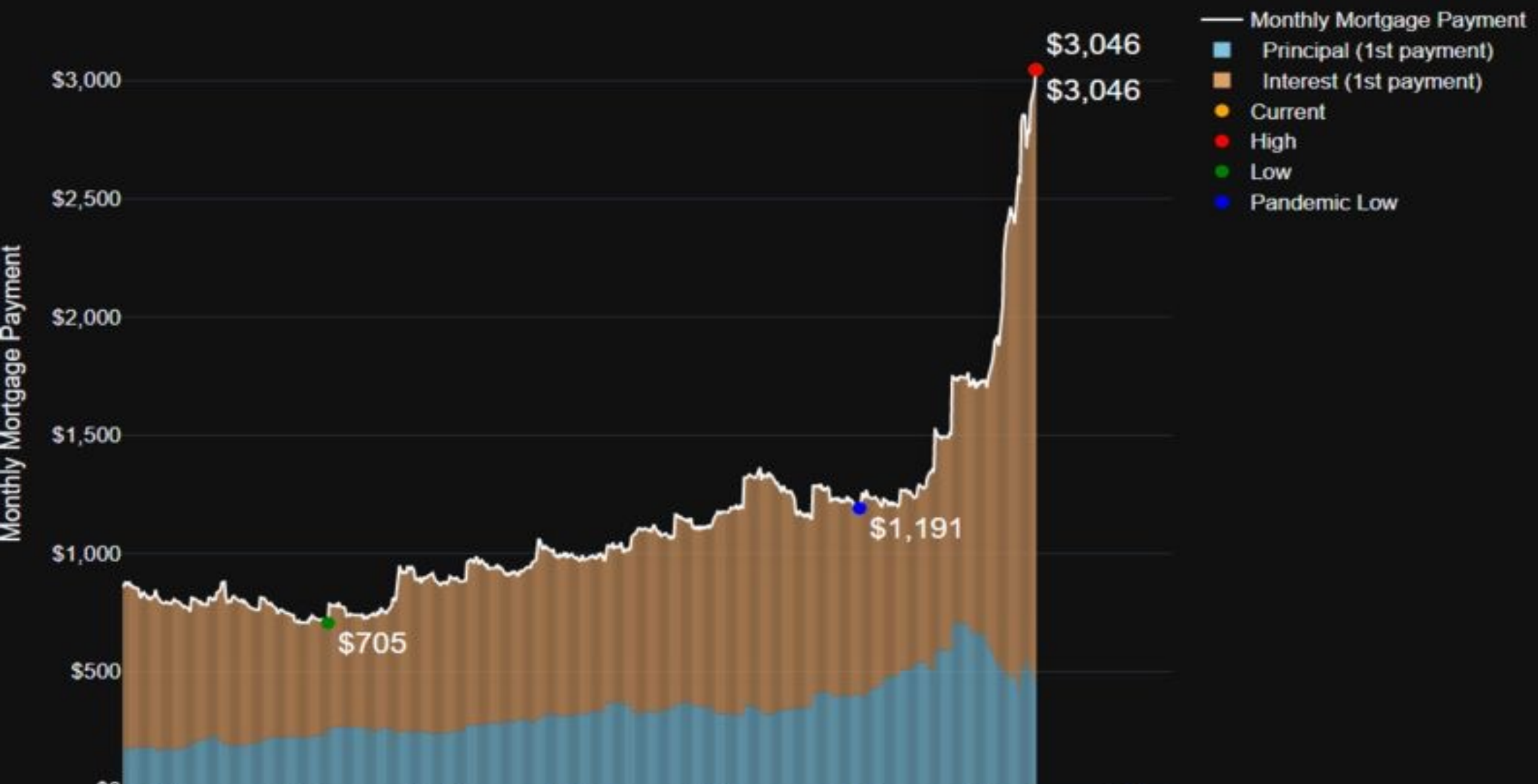


Real Personal Consumption Expenditures (PCE)





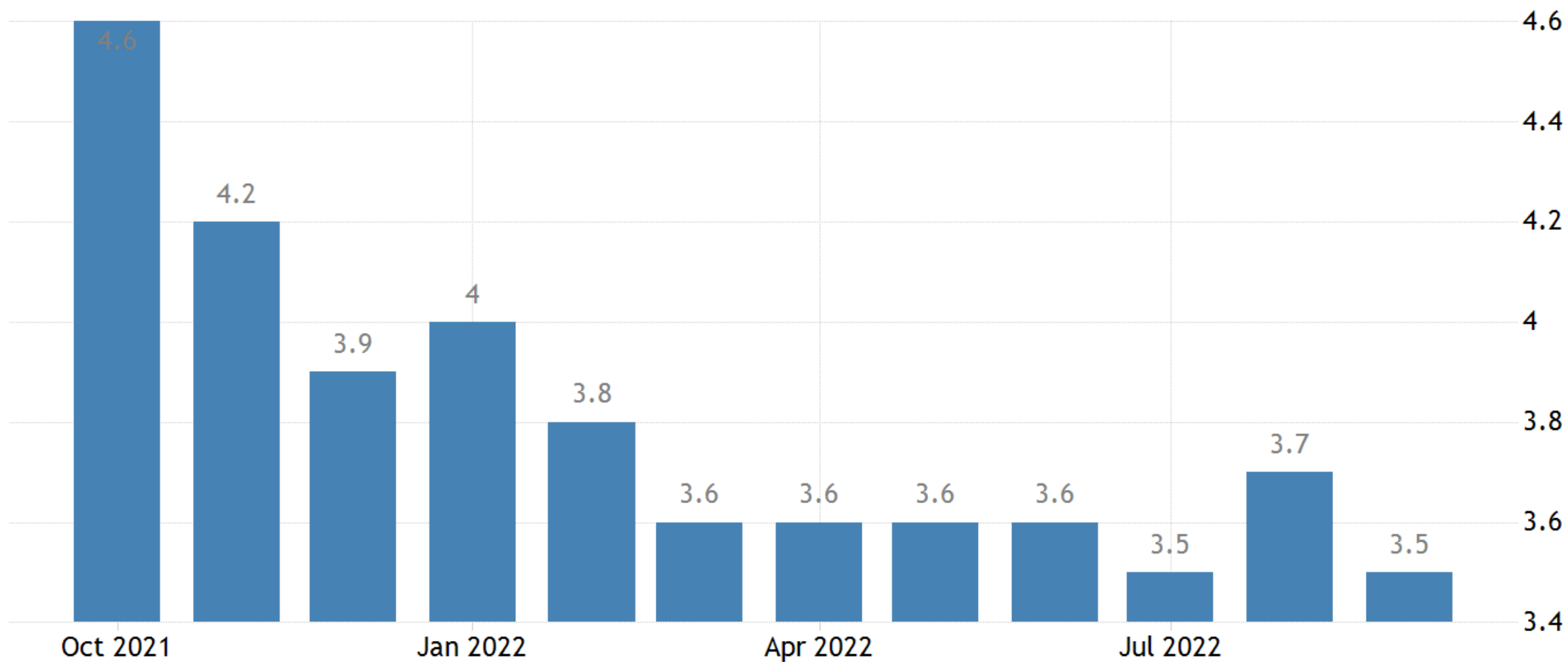
Monthly Mortgage Payment Using Median Existing Home Price - Austin-Round Rock-San Marcos, TX with a 20% Down Payment & Average 30Y Mortgage Rate



American Household Savings Now Lowest Since 2008

33% - April '20

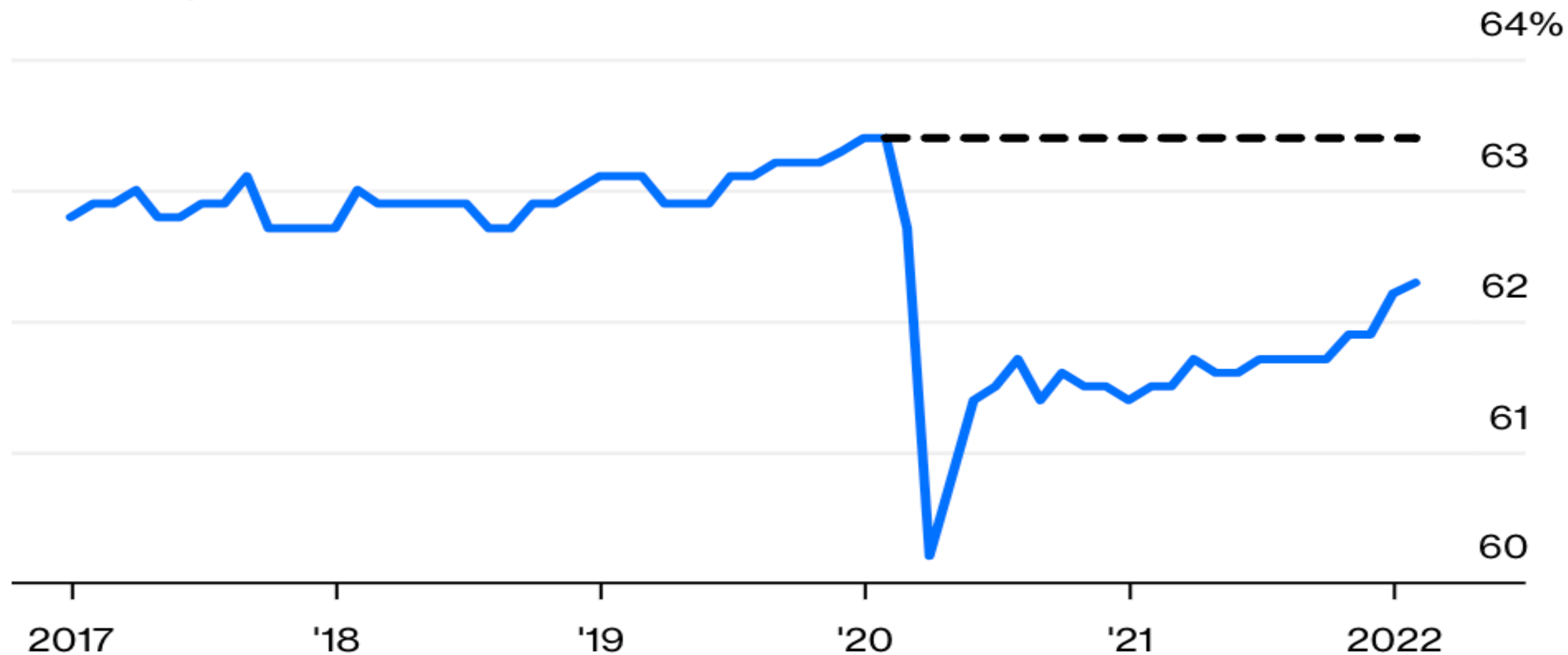
3% - October '22



Still a Ways to Go

Labor-force participation, ages 16 and older, seasonally adjusted

Participation rate Feb. 2020 rate



Source: U.S. Bureau of Labor Statistics

Department of Homeland Security
Texas Service Center
200 West 9th Street
Mesquite, TX 75185-1488



U.S. Citizenship and Immigration Services



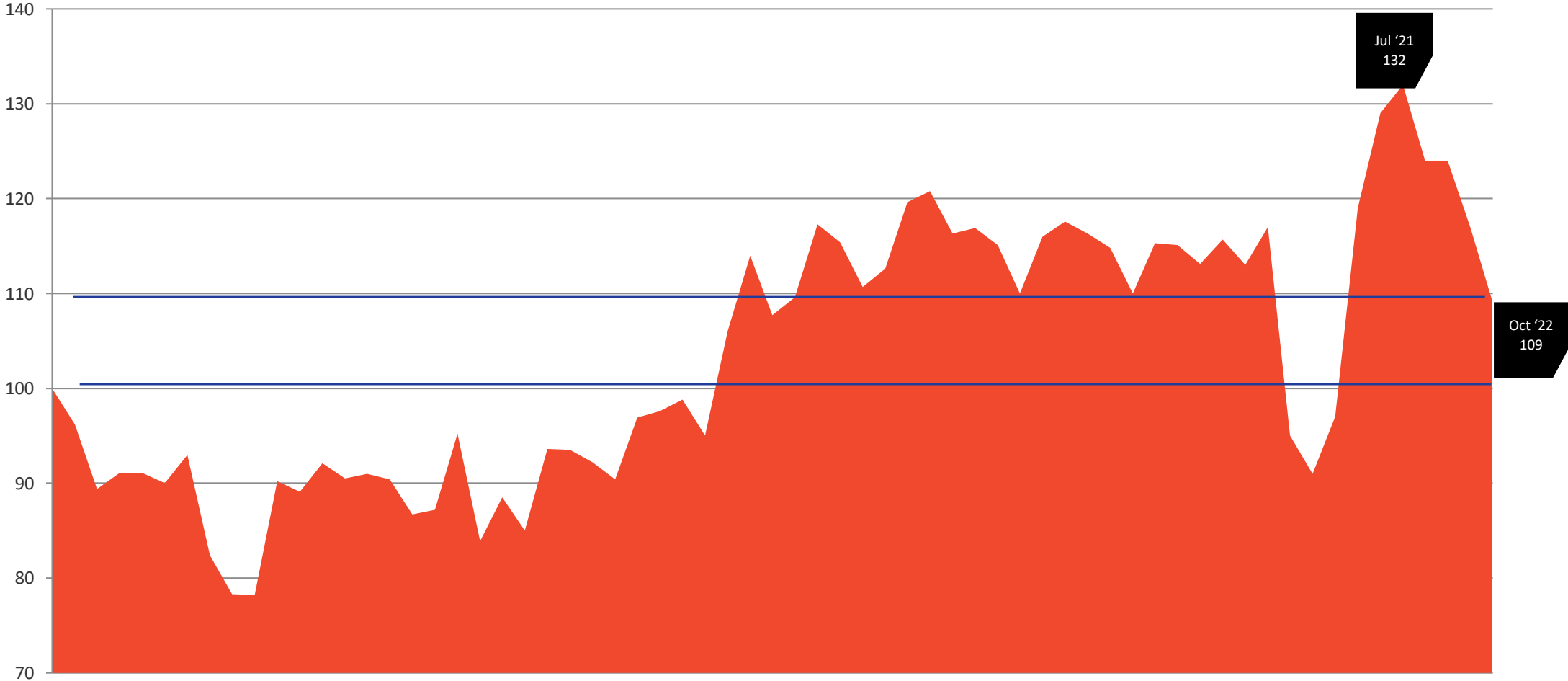
#2

WILL TRAVEL CONDITIONS BOOM OR
BUST? YES!

FEAR → UNDERSTANDING → ACTION → RATIONAL BEHAVIOR



U.S. Leisure Travel Will Decline Over Next 12 Months



Base: U.S. adults (n=4,551)
Source: MMGY Global's *travelhorizons*™/2022 *Portrait of American Travelers*® "Fall Edition"





Is Air Travel Really Back?

2/3

of travelers who did not fly the last six months plan to book a flight in the next six months

Experience Matters

30%

of travelers who experienced a flight cancellation or lost luggage in Summer '22 will not fly for their next vacation

Experience Matters

-25%

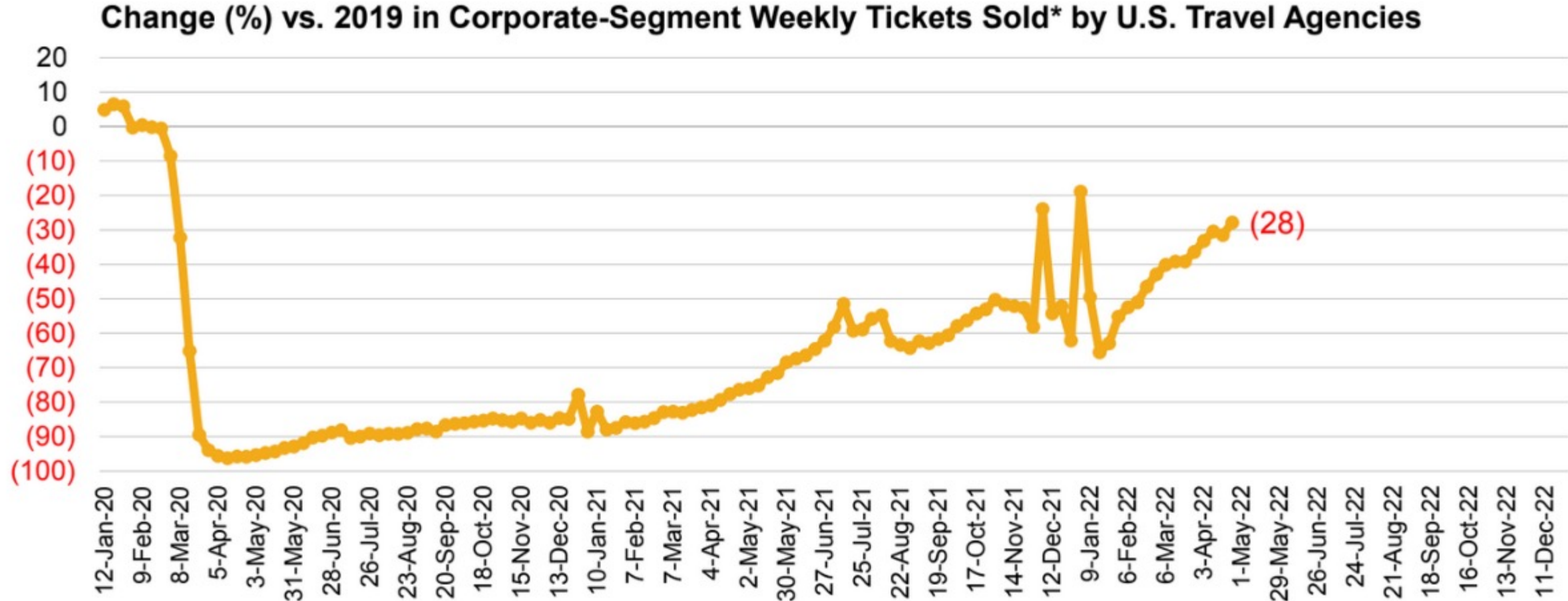
Passenger satisfaction in airport and flight experience, to the lowest level recorded



ROUTE MAPS ARE CHANGING

Corporate Ticket Sales Have Improved Steadily Over the Couple Months

Levels Remain Well Below 2019



Source: Airlines Reporting Corporation (ARC)

* Results do not include sales of tickets purchased directly from airlines and are not net of refunds or exchanges.







Relative Demand Still Strong

71%

Of people are still placing importance on taking vacation days over the next 12 months
(VS 81% IN AUGUST)

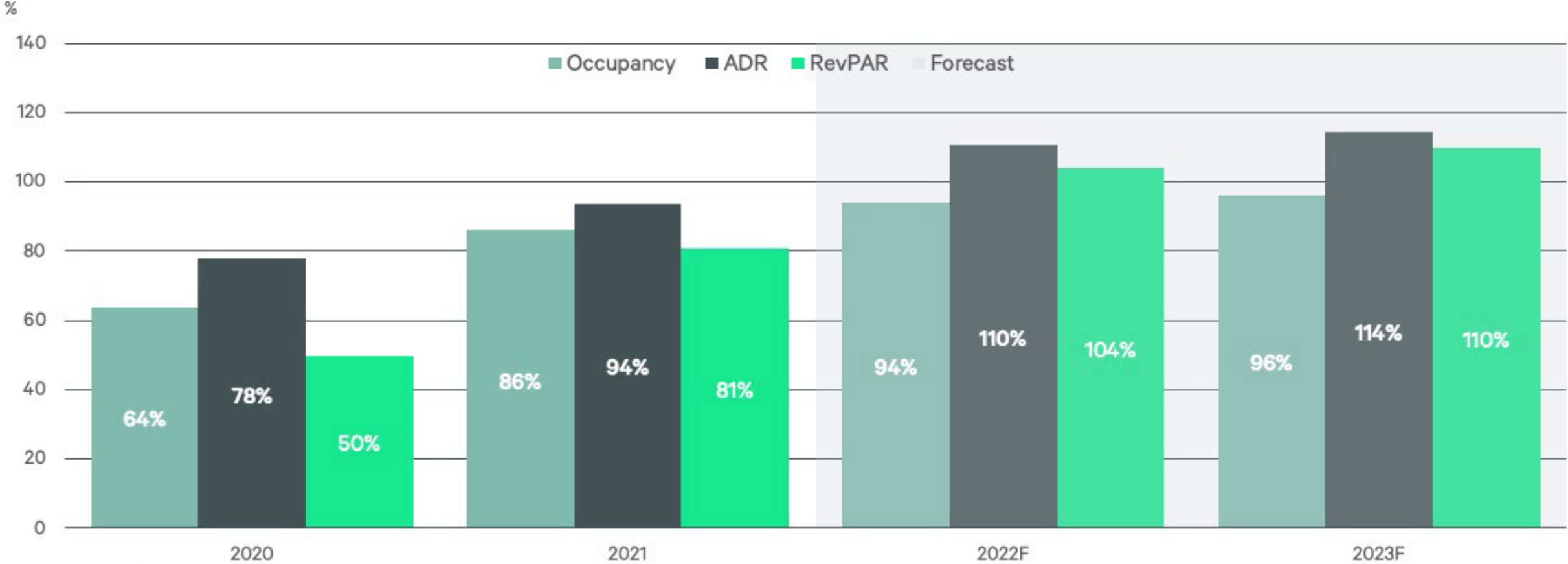
Commercial Demand Still Strengthening

83%

of workers WANT to take a business trip in the next 3 months

Nominal RevPAR and ADR should fully recover this year, Occupancy will recover in 2025

Hotel Performance Indicators as a percent of 2019



Short-Term Demand Stronger

57%

Of travelers will take a flight during the holiday season
(VS 35% IN 2019)



#3

**HOW ARE CONSUMER BEHAVIORS
CHANGING?**

1 CONTROL

Financial insecurity, adjustment to post-pandemic life and widespread misinformation leave consumers grasping for a sense of control. Brands can leverage the pillars of value to center the client and create tailored experiences.

2 RELIABILITY

Consumers don't ask for much. Becoming the favorite in a sea of sameness is pretty uncommon, but if you do your job well and meet expectations, being the favorite could be easier than it seems.

3 LEADERSHIP

Consumers are looking to brands for societal leadership. This can be a heavy burden ... or an opportunity to build equity and loyalty.

REVERSE ENGINEERING



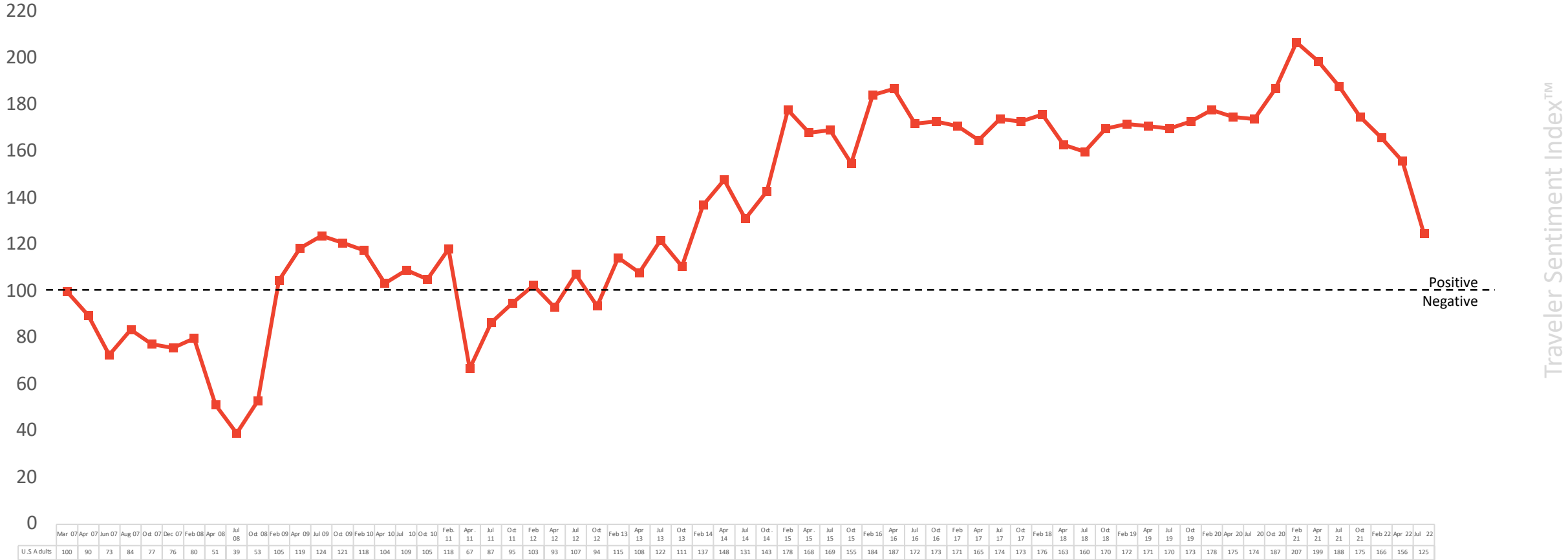


Rate Was The Driver in 2022

+26%

Growth vs. 2019

Index 3: Perceived Affordability of Travel



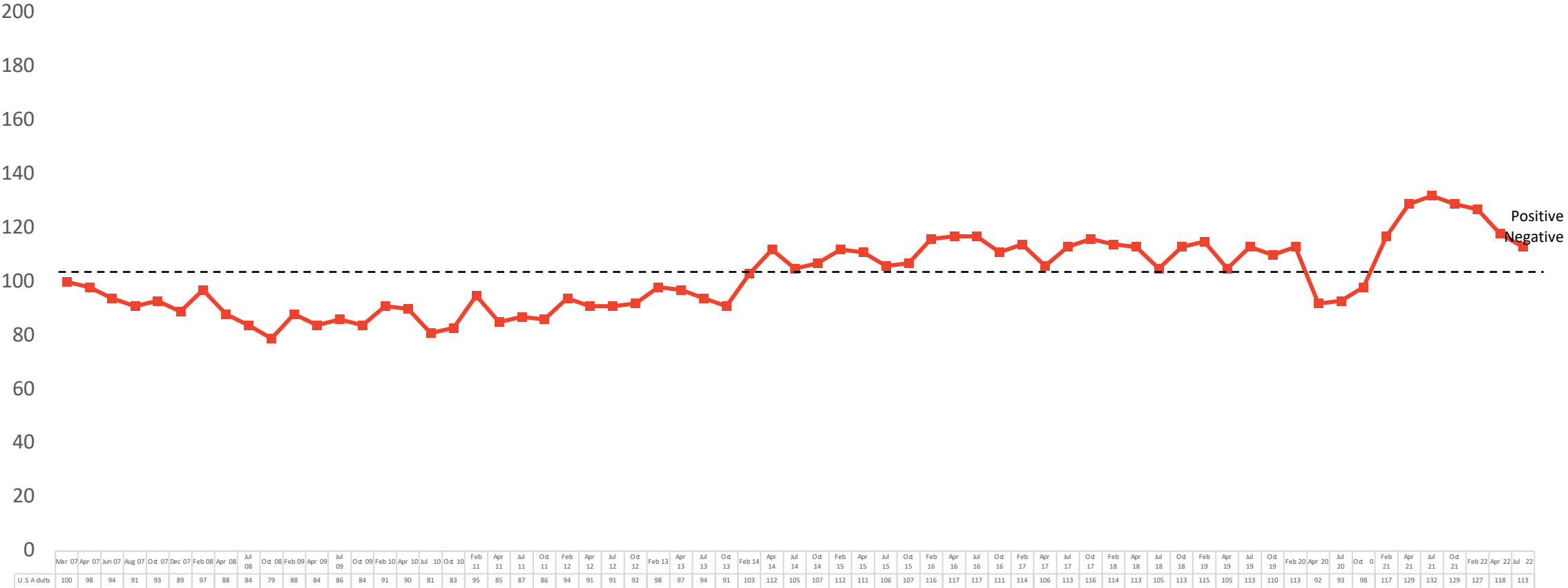
Source: MMGY Global's 2022 Portrait of American Travelers® "Fall Edition"

Affluent Travelers Will Dominate in 2023

+220

Travel Index of Households with \$250k HHI vs overall market

Intent for Travel to Europe Weakening



Source: MMGY Global's 2022 Portrait of American Travelers® "Fall Edition"

WHILE DEMAND FOR US CITY DESTINATIONS IS RETURNING

+12%

Q3 sentiment increase for
city experiences

A person is sitting on a sandy beach, using a laptop. The person is wearing a light-colored top, dark shorts, and white sneakers. A tan backpack and a hat are lying on the sand next to them. The ocean is visible in the background with gentle waves. The text 'working from wherever' is overlaid on the image in a black, italicized font, with a bullet point at the beginning. Below this text, the letters 'WFWW' are written in a large, bold, orange-red font.

• *working from wherever*

WFWW



WFH Allowing Americans To Travel More

66%

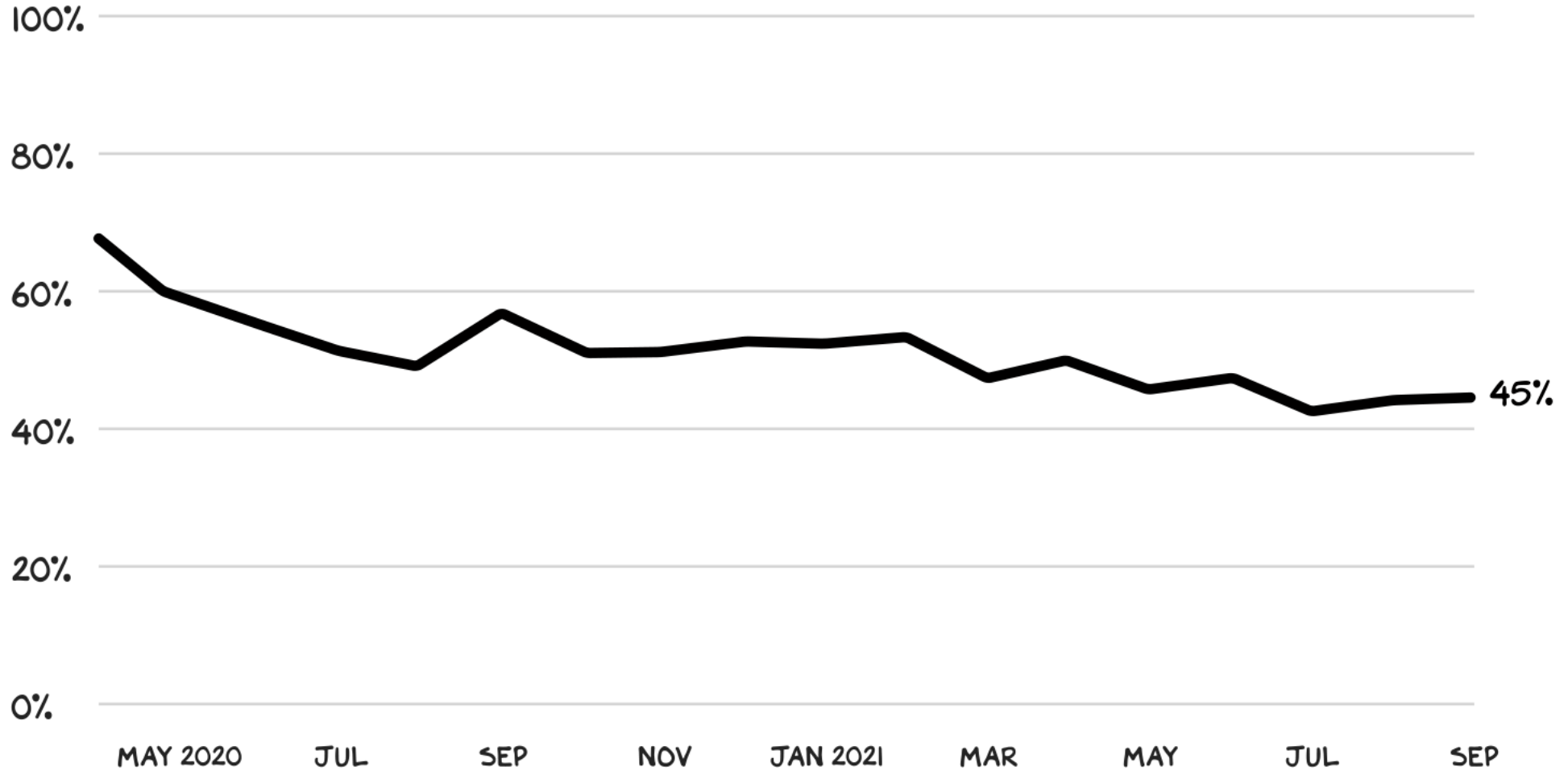
Of Americans said that they feel encouraged to explore new destinations while working from home.

34%

Of Americans said they have extended a trip because they now have freedom to work from home.

SHARE OF U.S. EMPLOYEES WORKING REMOTELY

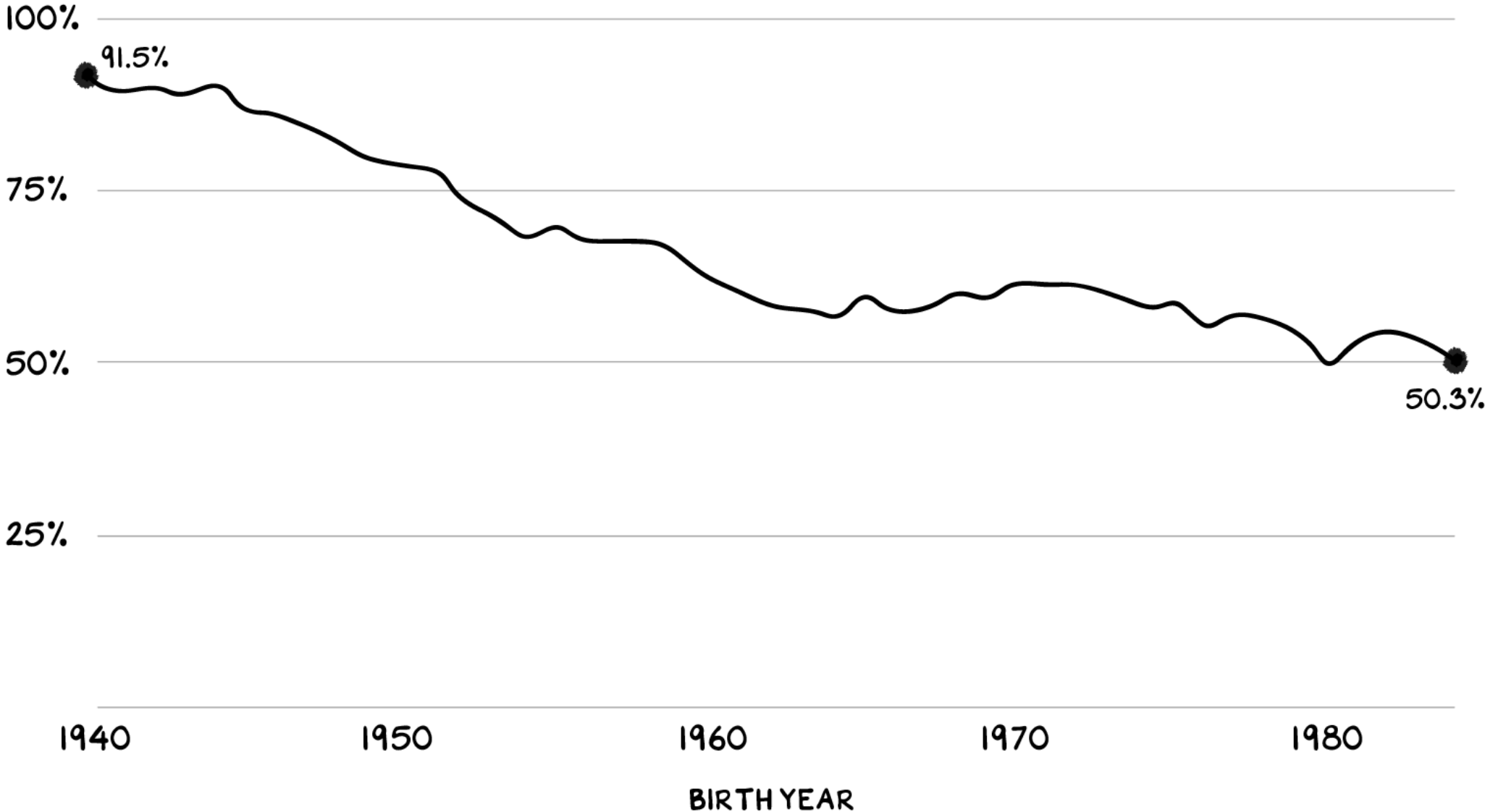
APRIL 2020 - SEPTEMBER 2021





ONLY HALF OF MILLENNIALS EARN MORE THAN PARENTS AT SAME AGE

THE SHARE OF CHILDREN EARNING MORE THAN THEIR PARENTS HAS REACHED ITS LOWEST POINT ON RECORD



SOURCE: CNN



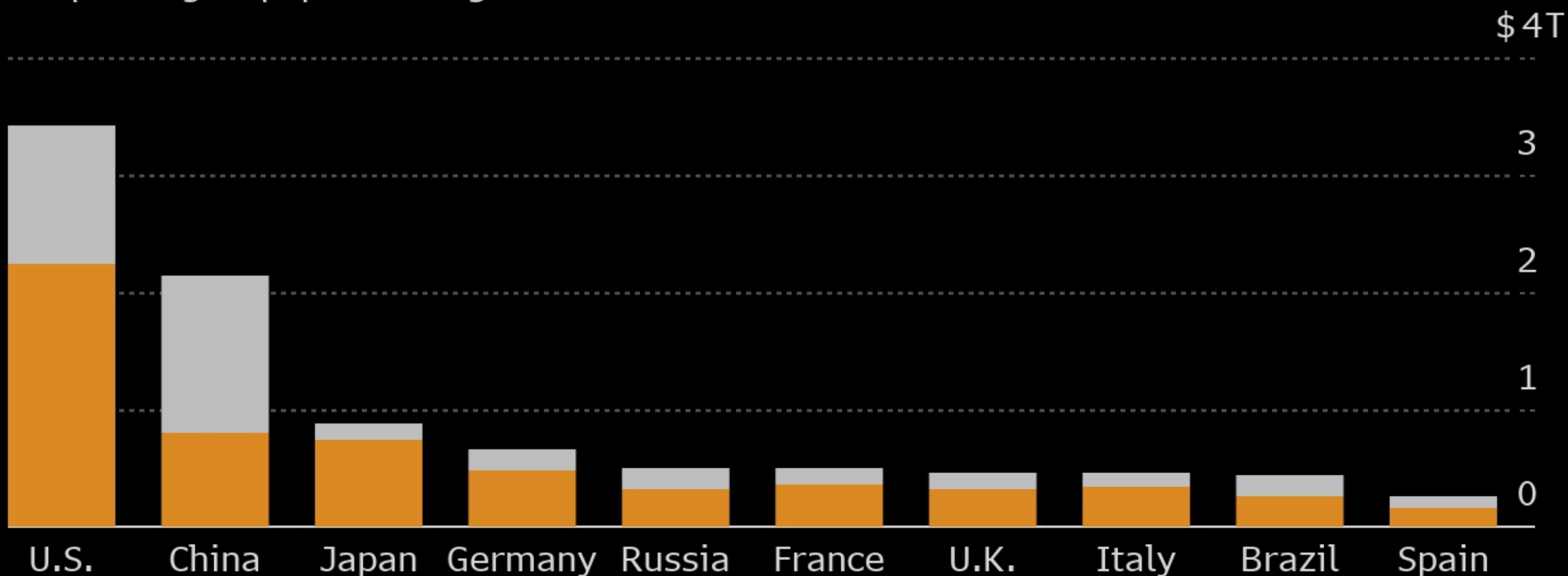




Spending Power

U.S., China are dominant markets for seniors' consumption

■ Spending of population aged 65 and above in 2020 ■ 2030 forecast



Source: World Data Lab

Note: Data is for middle and upper classes in 2011 purchasing power parity

Accessibility

A grayscale photograph of three men walking across a modern bridge. The man on the left is using a cane and has his arm around the man in the middle. The man on the right is walking slightly ahead of them. In the background, a city skyline with tall buildings is visible under a clear sky. The bridge has a metal railing with a diamond-patterned mesh.

24%

Of Americans now identify as
having a disability

Wellness Travel

50%

Faster growth rate than
conventional travel



An aerial photograph of a tropical coastline. The water is a vibrant turquoise color, and the land is covered in dense green vegetation. Several small, traditional wooden boats are visible in the water. The sky is blue with some light clouds.

#4

HOW ARE INFLUENCES CHANGING CONSUMERS?

CONSUMER



PURCHASE



BOOKING WINDOWS LENGTHENING

+60%

Q1-O-Q Growth for 90-180
Day Planning

CANCELATION/REBOOKING RATES

+31%

2022 VS 2019

 Hotels.com™

trivago®

KAYAK®

 HomeAway®



expedia group

Booking.com

 travelocity®

ORBITZ

hotwire™


 BOOKING HOLDINGS

Rentalcars.com

CarRentals.com™

agoda

EGENCIA®

 OpenTable™

wotif!



CLASSIC VACATIONS™



Expedia®
cruise ship centers®



Home



Dennis Schaal replied



Rafat Ali, Media Oper...  @... · 2h ...

One of the iconic companies that *never* even came up once on stage at Skift Global Forum was Tripadvisor. Not once. Imagine that even 5 yrs ago! This should scare the shit out of the company's new leadership, its silent, creeping march towards irrelevance, minus Viator.



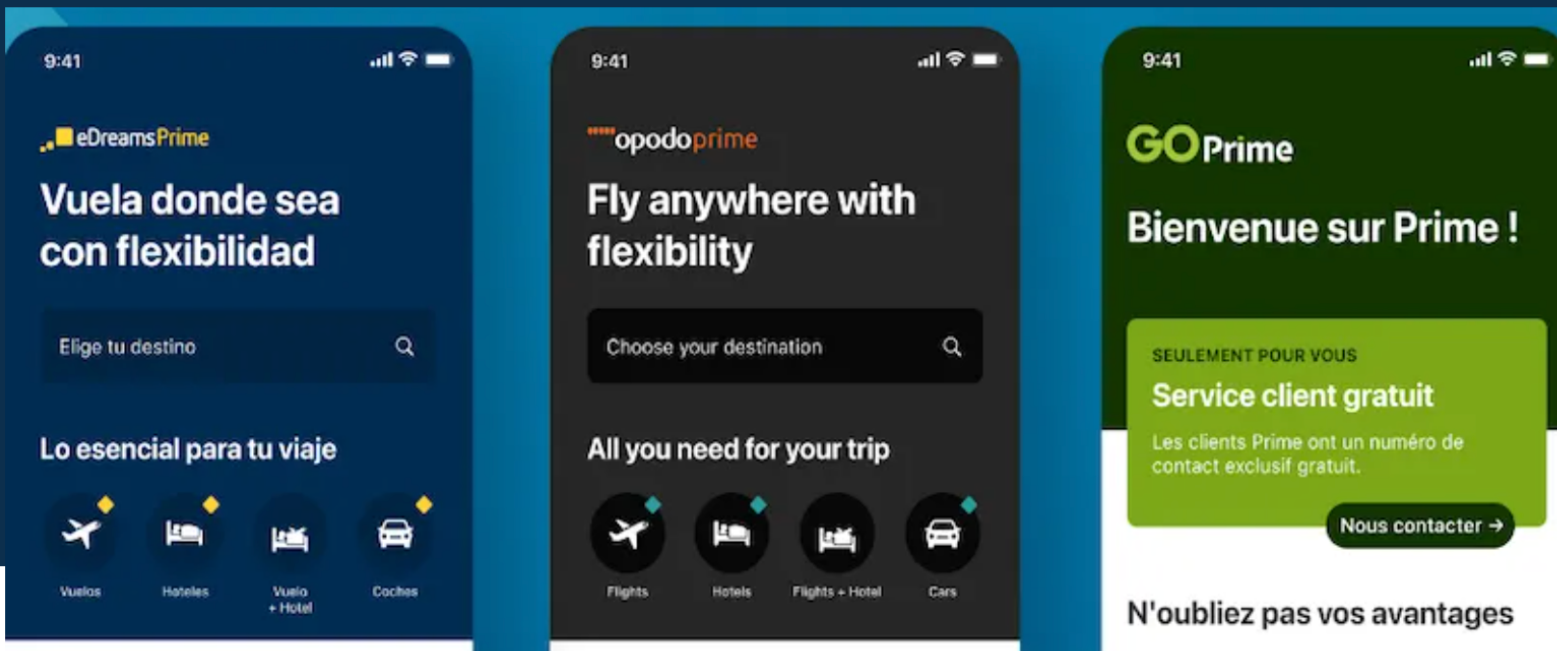
1 in 5

Travelers use Tripadvisor or Airbnb as search engines for local activities

A Shift In The Use of Aggregators

23%

Increase in non-travel apps or non-traditional travel websites for planning of travel



EDREAMS ODIGEO REPORTS

"ALL-TIME RECORDS" IN

BOOKINGS AND REVENUE

NEWS / ONLINE

BY LINDA FOX | AUGUST 31, 2022

SHARE

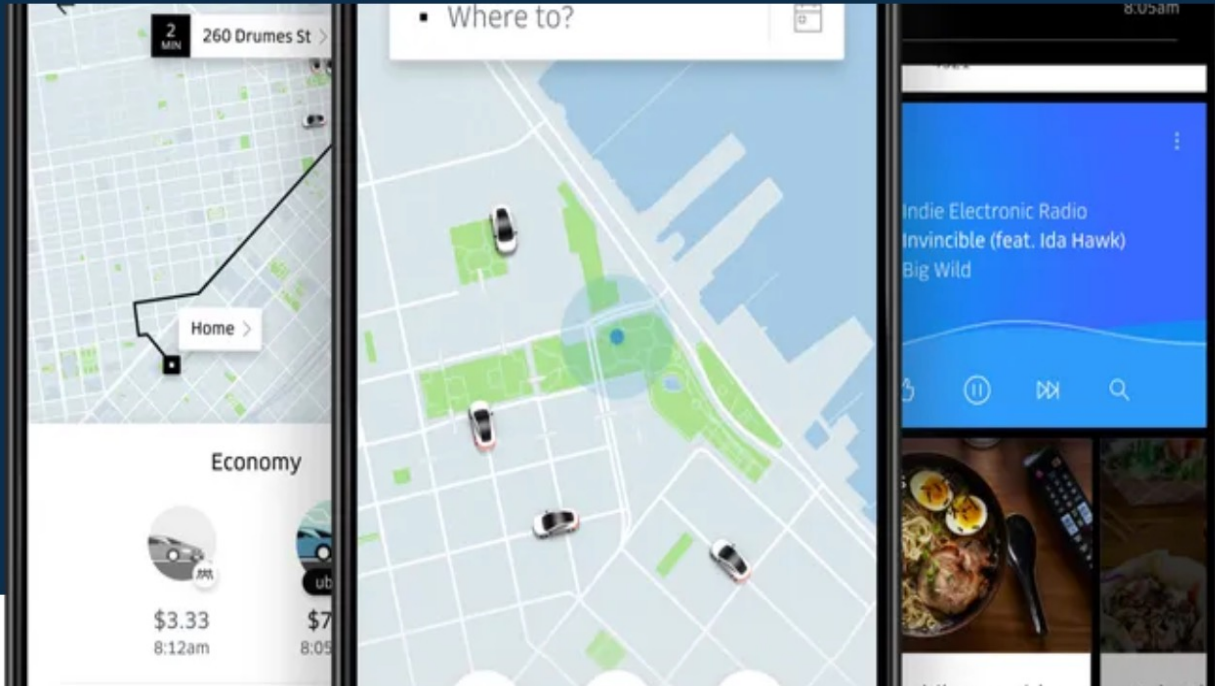


Event Calendar

ALL EVENTS AND REPLAYS

ADVERTISING

duetto



NEWS / ONLINE

APRIL 6, 2022

SHARE



UBER GOES FULL SUPERAPP, ADDS PLANES, TRAINS AND HOTELS

Event Calendar

14 APR **Travel recovery in 2022 and beyond: How can businesses ride the wave?**
April 14 2022
Online

27 **Phocuswright Europe 2022**



An aerial photograph of a tropical coastline. The water is a vibrant turquoise color, and the land is covered in dense green vegetation. Several small, traditional wooden boats are visible in the water. The sky is blue with some light clouds.

#5

WHERE MIGHT LURK THE
NEXT DISRUPTIONS?





THIS TABLE HAS BEEN SANITISED

SCAN THIS QR CODE FOR
THE RESTAURANT MENU






HARD ROCK
**SAFE +
SOUND**



TNMT

Three major use cases of NFTs in the travel context

Use Case	Example	Description	Today's Relevance	Long-term Outlook
 Travel Community	Travala	Loyalty program as part of booking platform	●	●
	Travel Toucans	Travel community with NFT rewards	●	●
	Nature Seychelles	Nature conservation NFTs	●	●
 Airline Loyalty	airBaltic	NFT art as digital collectible	●	●
	FlyCoin	Blockchain-based airline loyalty and rewards	●	●
	United Airlines	Digital NFT collectible as VIP rewards	●	●
 NFT Passport	San Marino	Government-issued NFT as vaccine certificate	●	●
	IATA	Blockchain-based passport for health certificates and other documentation	●	●
	Pebble	Blockchain-based device to record location-based data	●	●










SUSTAINABILITY MATTERS

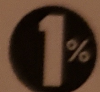
48%

Of travelers will focus more on the environmental impact of travel

...tomatoes
...butter-white miso,

40

38 



FOR THE
PLANET

*We commit to giving back 1% of yearly sales to environmental non-profits.

PURCHASE A TREE

Ask your server how to plant 50 trees with

"Trees for the Future" 5

OFFSET YOUR FLIGHT UNITED



By offsetting your flight, you will retire carbon credits and directly support community-driven activities that protect and restore critical forests around the world.

[← CALCULATE AGAIN](#)

YOUR RESULTS

Here is the footprint of your flight and how you can neutralize your impact on the climate.

DISTANCE FLOWN: 4,812 miles

FUEL EFFICIENCY: 60 MPG

0.75 = **\$7.48**

tons of carbon dioxide

in carbon offsets

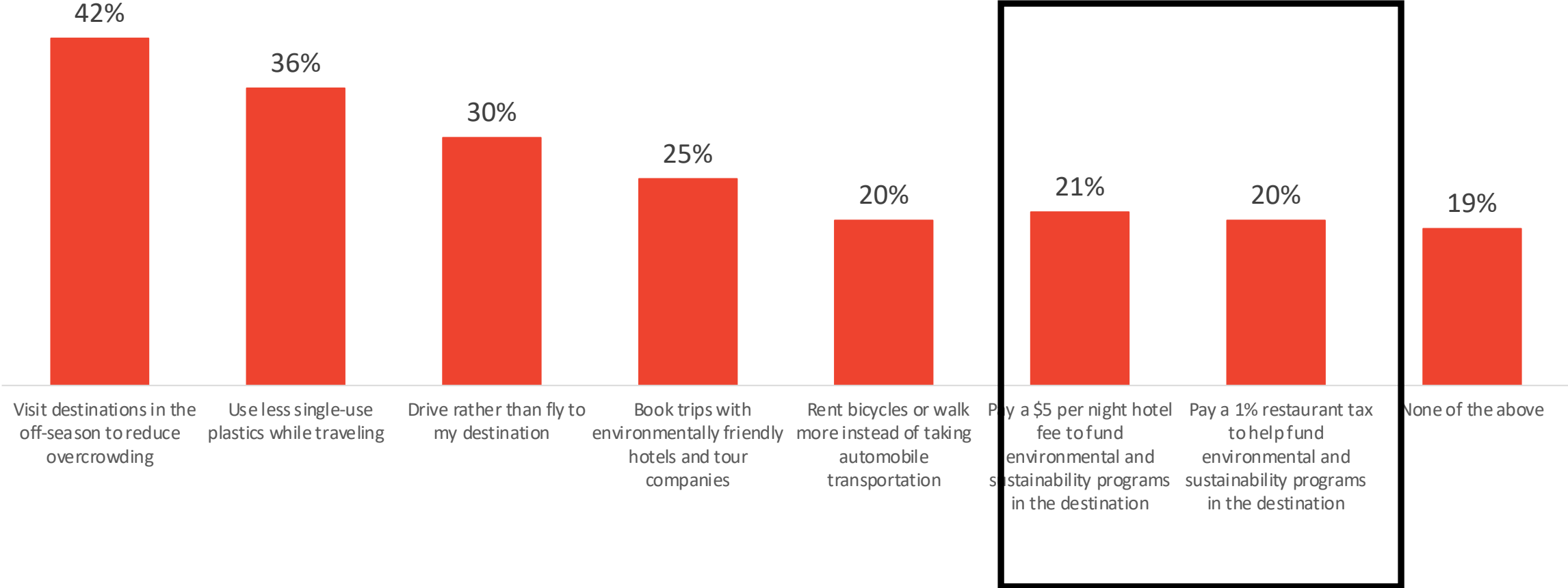
[OFFSET YOUR FLIGHT](#)

[Learn more about carbon credits](#)



Yet, Just 1 in 5 Travelers Is Willing to Pay a Nominal Fee That Increases The Cost of Lodging or Restaurants

Actions Willing to Take to Reduce Impact on Environment



Base: Active leisure travelers (n=3,985)

Source: MMGY Global's 2022 Portrait of American Travelers® "Spring Edition"

NFTs are not about digital tiaras

This is an economic environment that affects service and labor conditions more than travel demand

Leisure will normalize, be disproportionately via car and move back to cities as well as into a domestic balance

Affluent, older and WFH-flex segments will over index for leisure experiences

Commercial travel intent is growing more quickly than many suggest

Intermediary influence is as crucial as ever but is shifting



\$8.8 Trillion

WTTC

\$13.1 TRILLION

WTTC

Rank	Country/Region	2015 (USD billion)	2025 (USD billion)	Percent Increase
1	Mainland China	\$137.0	\$255.4	86%
2	United States of America	\$101.0	\$134.1	33%
3	Germany	\$74.4	\$97.6	31%
4	United Kingdom	\$61.3	\$96.9	58%
5	Russian Federation	\$22.6	\$49.1	118%
6	Hong Kong	\$26.7	\$47.4	78%
7	Singapore	\$22.5	\$44.9	99%
8	France	\$37.4	\$43.9	17%
9	Brazil	\$18.3	\$37.8	106%
10	South Korea	\$21.1	\$34.3	63%



THANK YOU



Clayton Reid
CEO, MMGY Global
Global @claytonreid



Roundtable Discussion

Approve Minutes

September 20, 2022

Voting

James City County
City of Williamsburg

Busch Gardens
Hotel/Motel Association
Jamestown Rediscovery
Restaurant Association
York County

Ruth Larson, Chair
Doug Pons, Treasurer

Kevin Lembke
Neal Chalkley
James Horn
Mickey Chohany
Chad Green

Product Development Fund Transfer Request

Andrew Trivette, City Manager, Williamsburg

Voting

James City County
City of Williamsburg

Busch Gardens
Hotel/Motel Association
Jamestown Rediscovery
Restaurant Association
York County

Ruth Larson, Chair
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Kevin Lembke
Neal Chalkley
James Horn
Mickey Chohany
Chad Green

Treasurer's Report

Financials

- Revenue/Expenses
- Cash on Hand
- Tax Revenue

September Revenue/Expenses

	Actual	Budget	Variance
REVENUE			
Sales Tax (58.1-603.2)	1,367,149	1,356,551	10,598
\$1 Transient Tax	192,904	138,835	54,069
Maintenance of Effort Funds	0	0	0
ARPA Grants	0	0	0
Other	8,604	2,500	6,104
Total Revenue	1,568,657	1,497,886	70,771
EXPENSES			
Destination Marketing	1,009,039	974,483	(34,556)
Other Sales & Marketing	32,919	46,596	13,677
Labor & Benefits	81,010	133,159	52,149
Admin	24,859	48,483	23,624
Total Expenses	1,147,828	1,202,721	54,893
Net Revenue Expense by Month	420,830	295,165	125,665

Source: York County, Office of the Commissioner and Revenue and VA Department of Taxation

FYTD Revenue/Expenses

	Actual	Budget	Variance
REVENUE			
Sales Tax (58.1-603.2)	3,812,190	3,802,184	10,006
\$1 Transient Tax	488,627	477,957	10,670
Maintenance of Effort Funds	0	37,350	(37,350)
ARPA Grants	0	0	0
Other	13,754	7,500	6,254
Total Revenue	4,314,572	4,324,991	(10,419)
EXPENSES			
Destination Marketing	2,571,222	3,127,549	556,327
Other Sales & Marketing	94,980	139,522	44,542
Labor & Benefits	248,759	366,384	117,625
Admin	75,190	127,191	52,001
Total Expenses	2,990,151	3,760,646	770,495
Net Revenue Expense by Month	1,324,421	564,345	760,076

Net Position - Beginning of Year	10,677,798	10,677,798	0
Net Position - Current YTD	12,002,219	11,242,143	760,076

Source: York County, Office of the Commissioner and Revenue and VA Department of Taxation

September Cash on Hand

Operating Cash

Cash Balances	Jul-22		
	Actual	Budget	Variance
Bank Account Balances: operations			
BB&T Reserve Checking	\$ 250,002	\$ 250,000	\$ 2
BB&T ICS Investment Fund	\$ 509,922	\$ 510,000	\$ (78)
Ches Bank Payroll	\$ 1,000	\$ -	\$ 1,000
Ches Bank Checking	\$ 5,858,721	\$ 6,183,611	\$ (324,890)
Total Cash on Hand	\$ 6,619,645	\$ 6,943,611	\$ (323,966)

Cash Balances	Aug-22		
	Actual	Budget	Variance
Bank Account Balances: operations			
BB&T Reserve Checking	\$ 250,002	\$ 250,000	\$ 2
BB&T ICS Investment Fund	\$ 509,929	\$ 510,000	\$ (71)
Ches Bank Payroll	\$ 1,000	\$ -	\$ 1,000
Ches Bank Checking	\$ 6,442,746	\$ 6,363,043	\$ 79,703
Total Cash on Hand	\$ 7,203,677	\$ 7,123,043	\$ 80,634

Cash Balances	Sep-22		
	Actual	Budget	Variance
Bank Account Balances: operations			
BB&T Reserve Checking	\$ 250,002	\$ 250,000	\$ 2
BB&T ICS Investment Fund	\$ 509,935	\$ 510,000	\$ (65)
Ches Bank Payroll	\$ 1,000	\$ -	\$ 1,000
Ches Bank Checking	\$ 6,634,543	\$ 6,658,208	\$ (23,665)
Total Cash on Hand	\$ 7,395,480	\$ 7,418,208	\$ (22,728)

Key Sources of Funds	Jul-22		
	Actual	Budget	Variance
State Disbursement	\$ 1,395,295	\$ 1,153,787	\$ 241,508
Total Gov't Sources	\$ 1,395,295	\$ 1,153,787	\$ 241,508

Key Sources of Funds	Aug-22		
	Actual	Budget	Variance
State Disbursement	\$ 1,368,821	\$ 1,458,326	\$ (89,505)
Total Gov't Sources	\$ 1,368,821	\$ 1,458,326	\$ (89,505)

Key Sources of Funds	Sep-22		
	Actual	Budget	Variance
State Disbursement	\$ 1,560,053	\$ 1,495,386	\$ 64,667
Total Gov't Sources	\$ 1,560,053	\$ 1,495,386	\$ 64,667

Interest Earned:	Jul-22		
	Actual	Budget	Variance
State Interest Paid	\$ -	\$ -	\$ -
BB&T Reserve Checking	\$ 16	\$ -	\$ 16
BB&T ICS Investment Fund	\$ 4	\$ -	\$ 4
Ches Bank Money Market	\$ 994	\$ -	\$ 994
Ches Bank Checking	\$ 1,265	\$ 2,500	\$ (1,235)
Total Interest Earned	\$ 2,279	\$ 2,500	\$ (221)

Interest Earned:	Aug-22		
	Actual	Budget	Variance
State Interest Paid	\$ -	\$ -	\$ -
BB&T Reserve Checking	\$ 2	\$ -	\$ 2
BB&T ICS Investment Fund	\$ 4	\$ -	\$ 4
Ches Bank Money Market	\$ 1,100	\$ -	\$ 1,100
Ches Bank Checking	\$ 1,266	\$ 2,500	\$ (1,234)
Total Interest Earned	\$ 2,373	\$ 2,500	\$ (127)

Interest Earned:	Sep-22		
	Actual	Budget	Variance
State Interest Paid	\$ -	\$ -	\$ -
BB&T Reserve Checking	\$ 2	\$ -	\$ 2
BB&T ICS Investment Fund	\$ 4	\$ -	\$ 4
Ches Bank Money Market	\$ 3,657	\$ -	\$ 3,657
Ches Bank Checking	\$ 4,676	\$ 2,500	\$ 2,176
Total Interest Earned	\$ 8,339	\$ 2,500	\$ 5,839

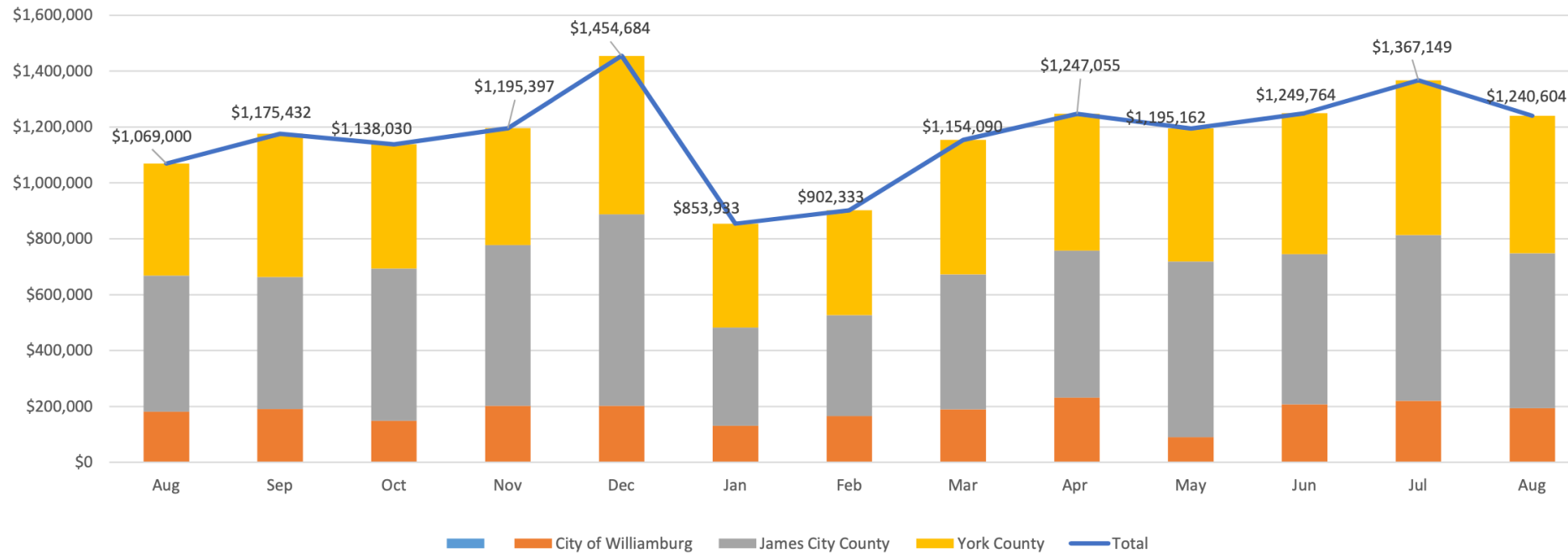
Product Development Reserves

Cash Balances	Jul-22		
	Actual	Budget	Variance
Bank Account Balances: Reserves			
Ches Bank Money Market	\$ 5,182,423	\$ 5,157,680	\$ 24,743
Total Cash on Hand	\$ 5,182,423	\$ 5,157,680	\$ 24,743

Cash Balances	Aug-22		
	Actual	Budget	Variance
Bank Account Balances: Reserves			
Ches Bank Money Market	\$ 5,183,523	\$ 5,158,780	\$ 24,743
Total Cash on Hand	\$ 5,183,523	\$ 5,158,780	\$ 24,743

Cash Balances	Sep-22		
	Actual	Budget	Variance
Bank Account Balances: Reserves			
Ches Bank Money Market	\$ 5,187,180	\$ 5,159,880	\$ 27,300
Total Cash on Hand	\$ 5,187,180	\$ 5,159,880	\$ 27,300

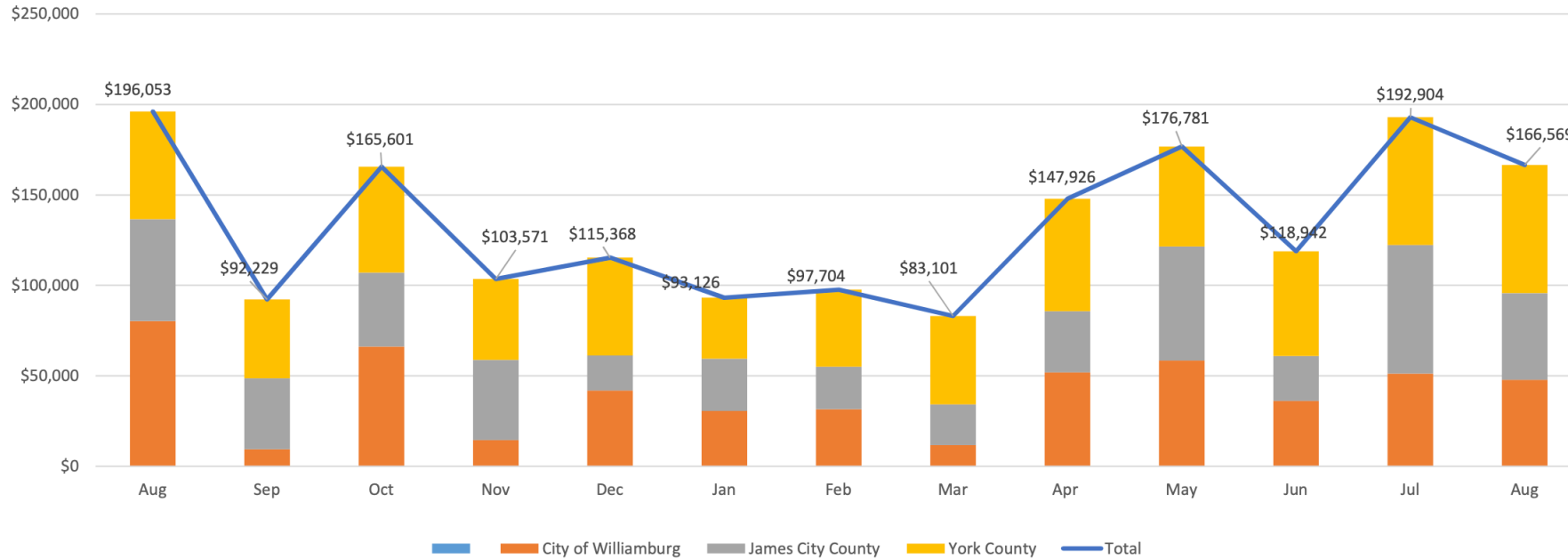
Sales Tax



§§ 58.1-603.2 1/2 of 1%													
FY2022 / 2023	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Total
City of Williamsburg	\$190,799	\$149,111	\$202,317	\$202,613	\$131,465	\$165,912	\$189,651	\$231,784	\$90,027	\$207,491	\$220,587	\$193,545	\$2,175,302
James City County	\$471,923	\$544,978	\$575,357	\$684,676	\$350,997	\$360,658	\$481,969	\$525,667	\$629,207	\$537,213	\$592,409	\$554,137	\$6,309,192
York County	\$512,710	\$443,940	\$417,723	\$567,395	\$371,471	\$375,763	\$482,470	\$489,605	\$475,929	\$505,060	\$554,153	\$492,921	\$5,689,140
Total	\$1,175,432	\$1,138,030	\$1,195,397	\$1,454,684	\$853,933	\$902,333	\$1,154,090	\$1,247,055	\$1,195,162	\$1,249,764	\$1,367,149	\$1,240,604	\$14,173,634
Calendar YTD Total													\$9,210,091
FY2021 / 2022	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Total
City of Williamsburg	\$143,078	\$162,942	\$159,187	\$181,890	\$129,427	\$111,620	\$178,712	\$184,092	\$184,364	\$198,233	\$161,127	\$180,467	\$1,975,139
James City County	\$373,849	\$350,286	\$409,548	\$486,887	\$313,509	\$300,542	\$435,892	\$470,743	\$437,697	\$561,486	\$585,238	\$488,021	\$5,213,697
York County	\$404,705	\$321,911	\$405,622	\$469,441	\$340,202	\$328,074	\$449,488	\$478,979	\$453,380	\$496,320	\$548,283	\$400,511	\$5,096,916
Total	\$921,632	\$835,139	\$974,357	\$1,138,217	\$783,138	\$740,236	\$1,064,092	\$1,133,814	\$1,054,706	\$1,256,039	\$1,294,648	\$1,069,000	\$12,265,018
Calendar YTD Total													\$8,395,672

*Source: York County, Office of the Commissioner of Revenue

Transient Tax



Transient Tax \$1 of the \$2													
FY2022 / 2023	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Total
City of Williamsburg	\$9,465	\$66,183	\$14,661	\$41,856	\$30,655	\$31,478	\$11,790	\$52,009	\$58,379	\$36,281	\$51,383	\$47,851	\$451,991
James City County	\$39,182	\$40,829	\$44,154	\$19,433	\$28,881	\$23,543	\$22,353	\$33,659	\$63,164	\$24,694	\$70,889	\$47,765	\$458,546
York County	\$43,582	\$58,589	\$44,756	\$54,079	\$33,590	\$42,683	\$48,958	\$62,258	\$55,238	\$57,967	\$70,632	\$70,953	\$643,285
Total	\$92,229	\$165,601	\$103,571	\$115,368	\$93,126	\$97,704	\$83,101	\$147,926	\$176,781	\$118,942	\$192,904	\$166,569	\$1,553,822
Calendar YTD Total													\$1,077,053
FY2021 / 2022	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Total
City of Williamsburg	\$30,678	\$24,695	\$19,294	\$13,619	\$18,982	\$16,116	\$9,439	\$22,923	\$56,282	\$41,821	\$35,851	\$80,268	\$369,968
James City County	\$27,300	\$19,161	\$22,875	\$16,989	\$16,914	\$9,478	\$32,773	\$42,022	\$41,597	\$41,896	\$31,557	\$56,393	\$358,955
York County	\$32,239	\$30,061	\$22,745	\$32,401	\$27,983	\$25,888	\$37,132	\$52,932	\$45,170	\$55,354	\$69,741	\$59,392	\$491,038
Total	\$90,217	\$73,917	\$64,914	\$63,009	\$63,879	\$51,482	\$79,344	\$117,877	\$143,049	\$139,071	\$137,149	\$196,053	\$1,219,961
Calendar YTD Total													\$927,904

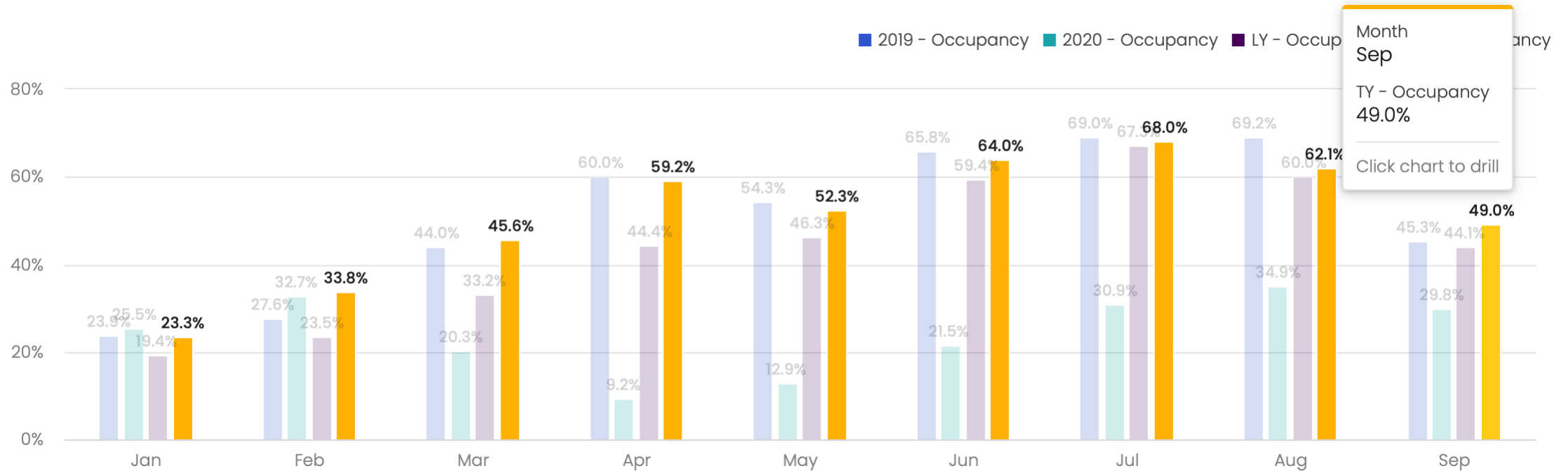
*Source: York County, Office of the Commissioner of Revenue

Executive Director and CEO Report

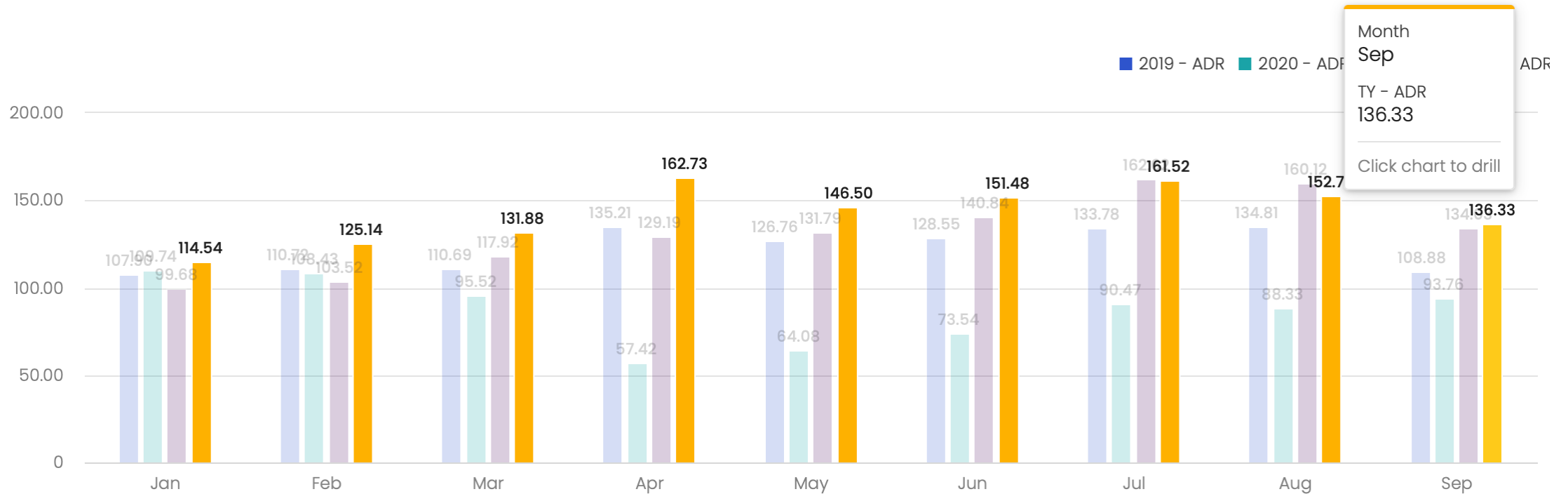
Key Performance Indicators

Marketing/Public Relations/Sales

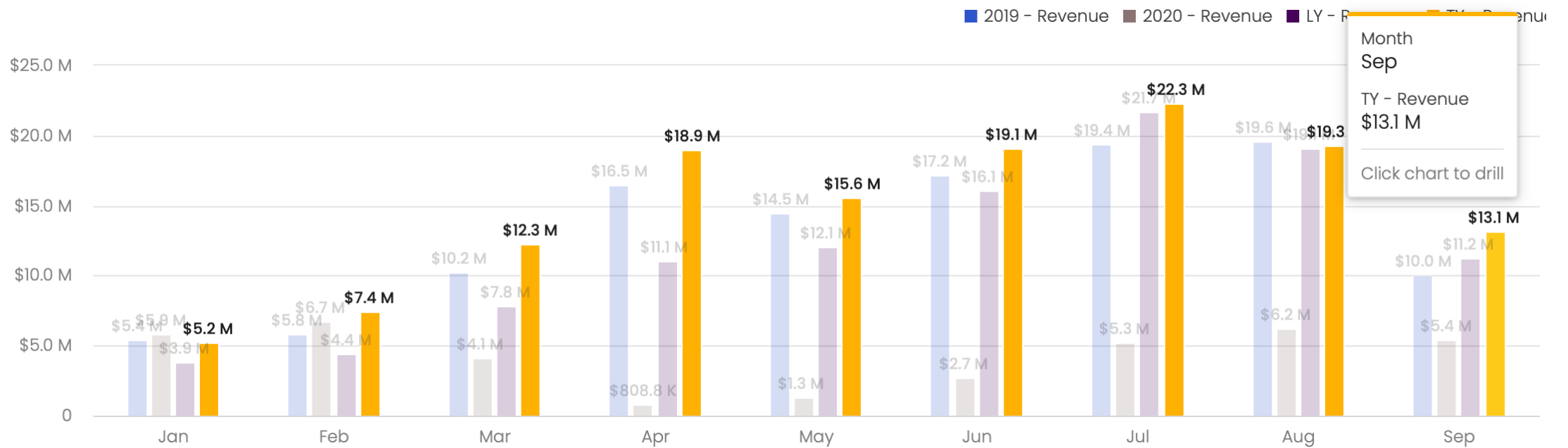
STR: Occupancy



STR: Average Daily Rate



STR: Revenue



STR: CYTD Comparison to 2019

YTD Occupancy

51.1%

YTD ADR

\$146.84

YTD RevPAR

\$75.10

YTD 2019 Occupancy

51.2%

YTD 2019 ADR

\$125.22

YTD 2019 RevPAR

\$64.11

Occ % Point Change YTD from 2019

-0.1%

ADR % Change YTD from 2019

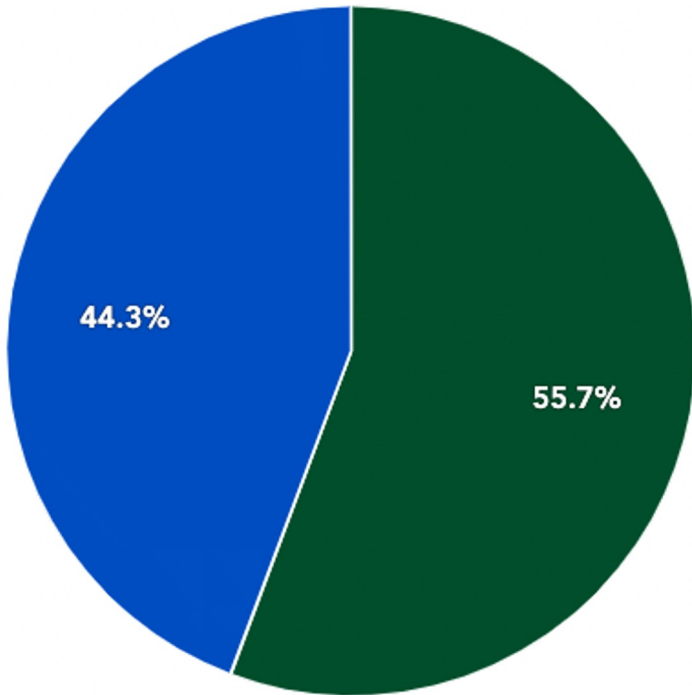
+17.3%

RevPAR % Change YTD from 2019

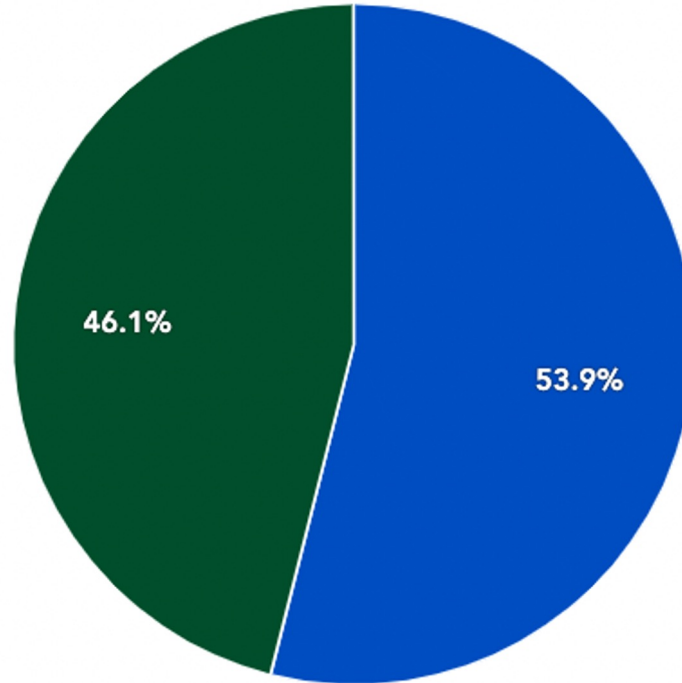
+17.1%

In-State vs. Out-of-State Visitation

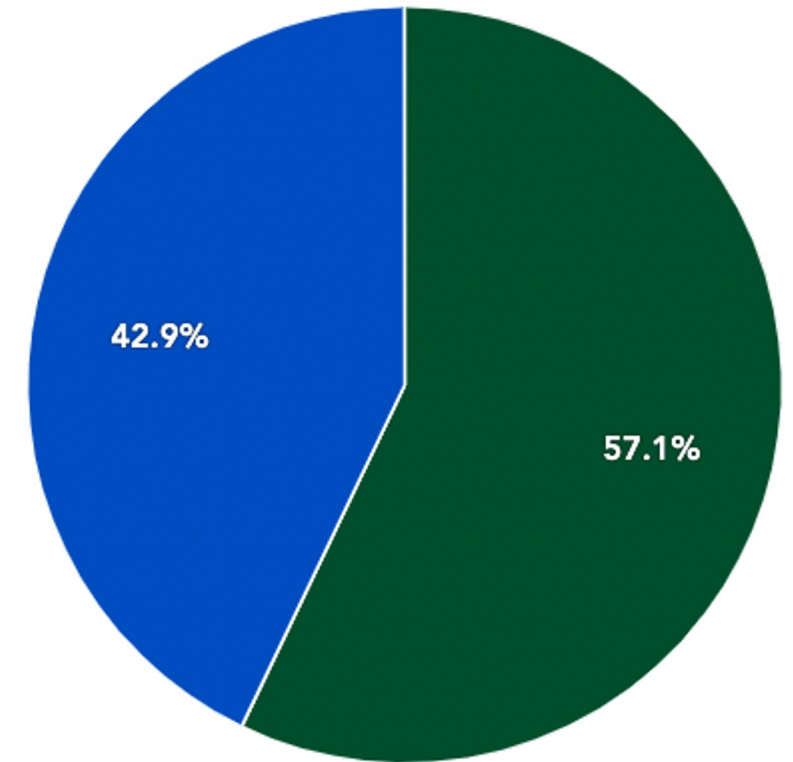
September 2019



September 2021



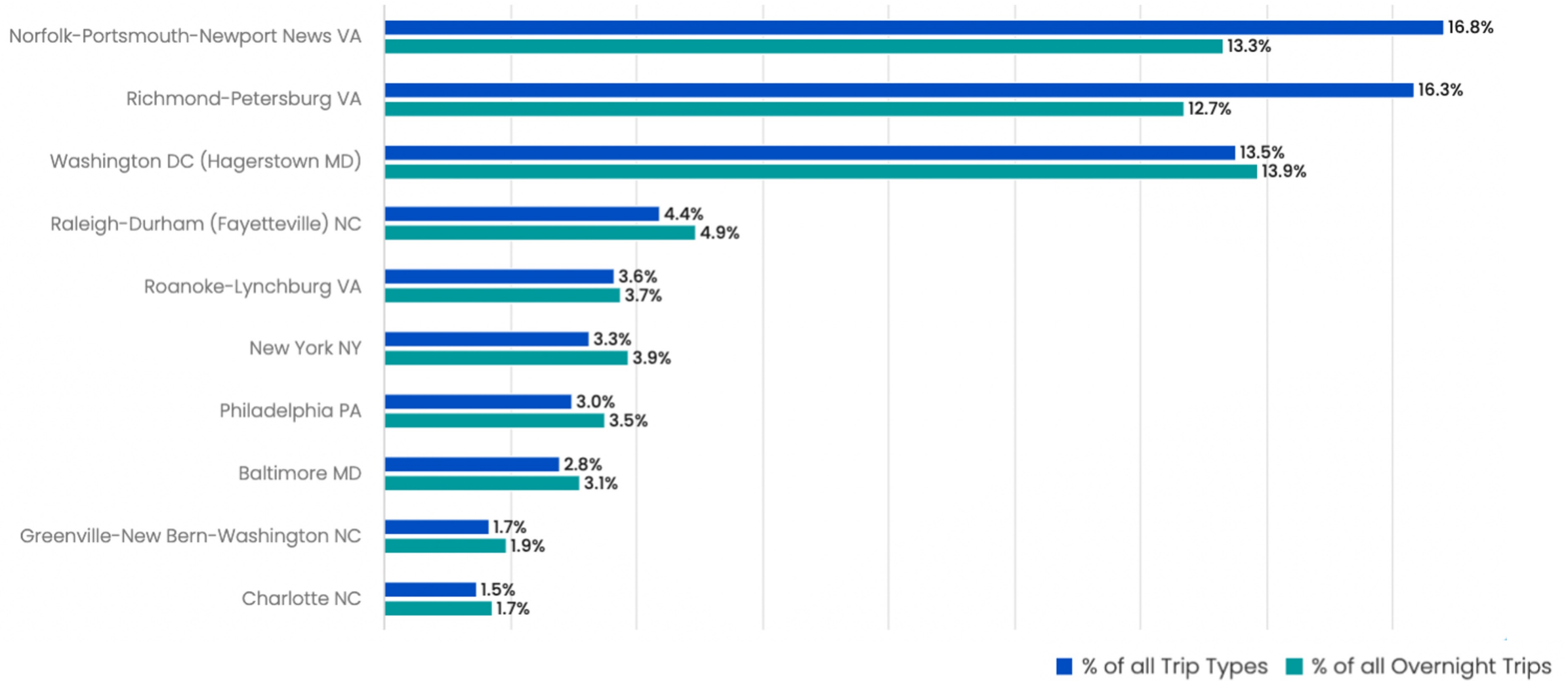
September 2022



● Out-of-State ● In-State

*Source: Near (geolocation) 9/1/2022-9/30/2022, percent of total visitor devices observed in Williamsburg

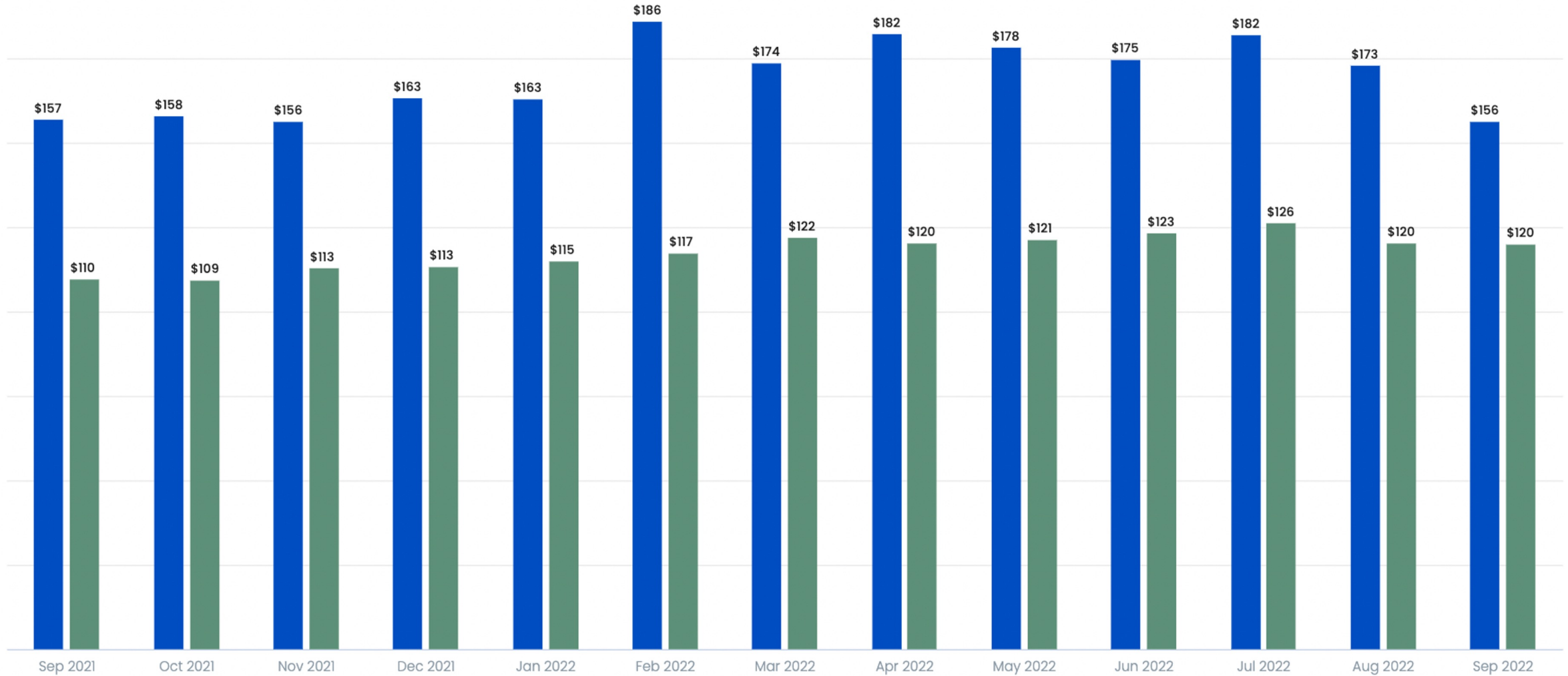
September 2022 Top Origin Markets



*Source: Near (geolocation) 9/1/2022-9/30/2022

Average Visitor Spend in Historic Triangle vs. Zartico Average

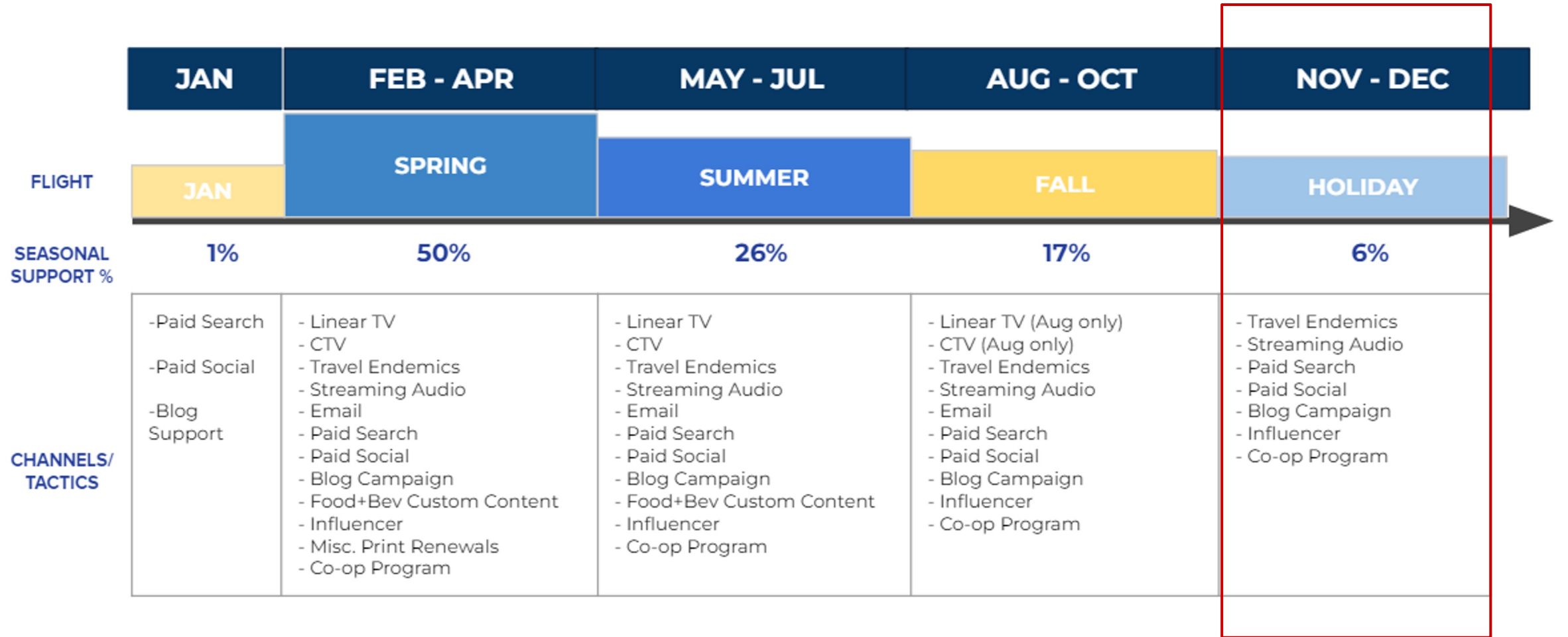
Williamsburg's average visitor spend is consistently above Zartico's average.



*Source: Affinity and Zartico. Average visitor spending is calculated as total visitor spending divided by visitor cardholder count. The blue bar is Williamsburg data, where the green is the average of all Zartico's 180+ partners.

Marketing

2022 Campaign Overview



Geographic Targeting

Short Drive + Established Success/ Heaviest Volume

- Washington, DC (Hagerstown)
- Charlotte, NC
- Philadelphia, PA
- Baltimore, MD
- Raleigh-Durham, NC
- Charlottesville, VA
- Harrisonburg, VA
- Roanoke-Lynchburg, VA
- Salisbury, MD
- Greenville-New Bern-
Washington NC

Short Drive + Established Success/ Lighter Volume

- Harrisburg-Lancaster-
Lebanon-York, PA
- Greensboro-High Point-
Winston Salem, NC
- Florence-Myrtle Beach, SC

Longer Drive + Past Success

- Johnstown-Altoona-State
College, PA
- Pittsburgh, PA
- Wilkes Barre-Scranton, PA
- Knoxville, TN

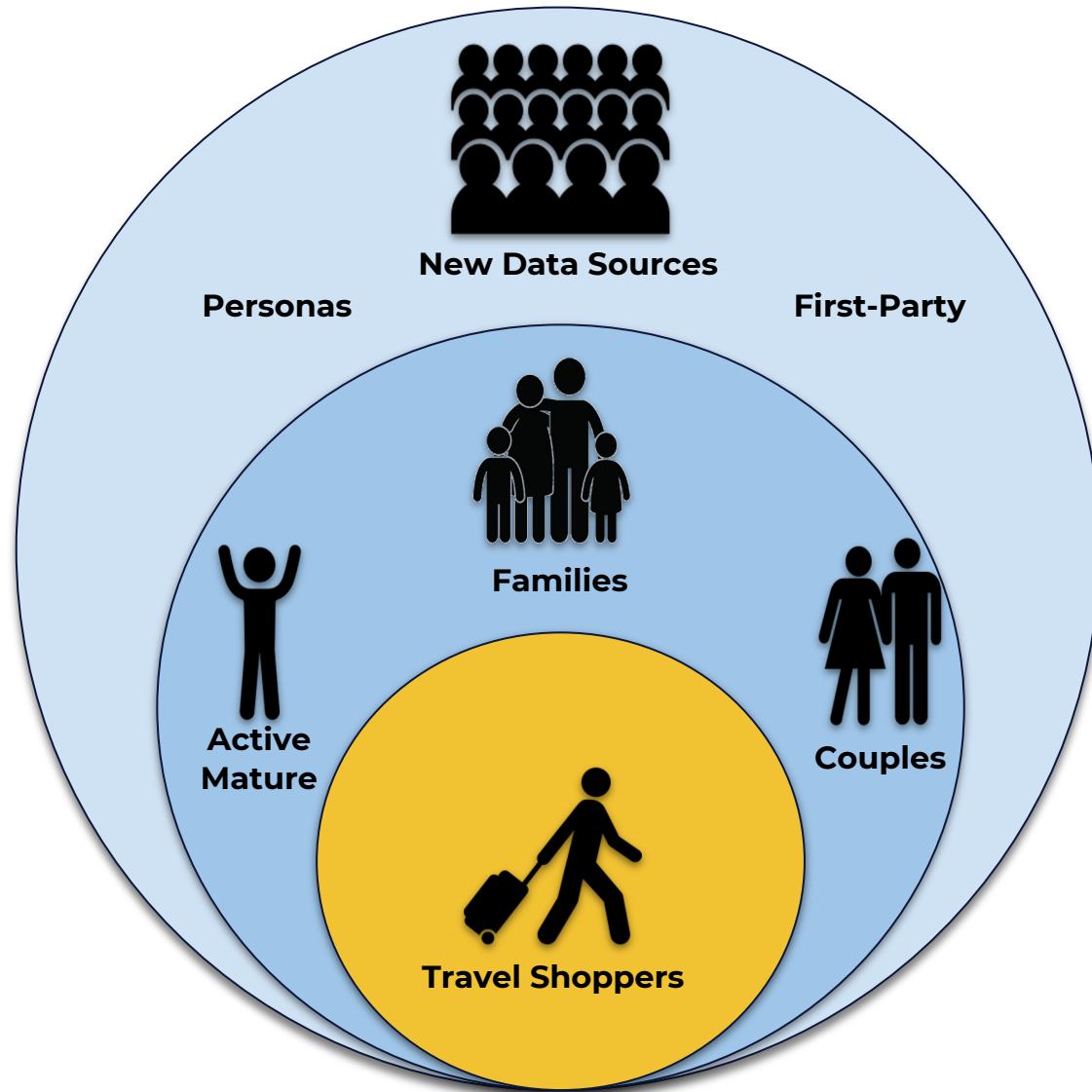
EXPANSION in 2020/21

- Cleveland, OH
- Columbus, OH
- New York, NY

LAUNCHED in 2022

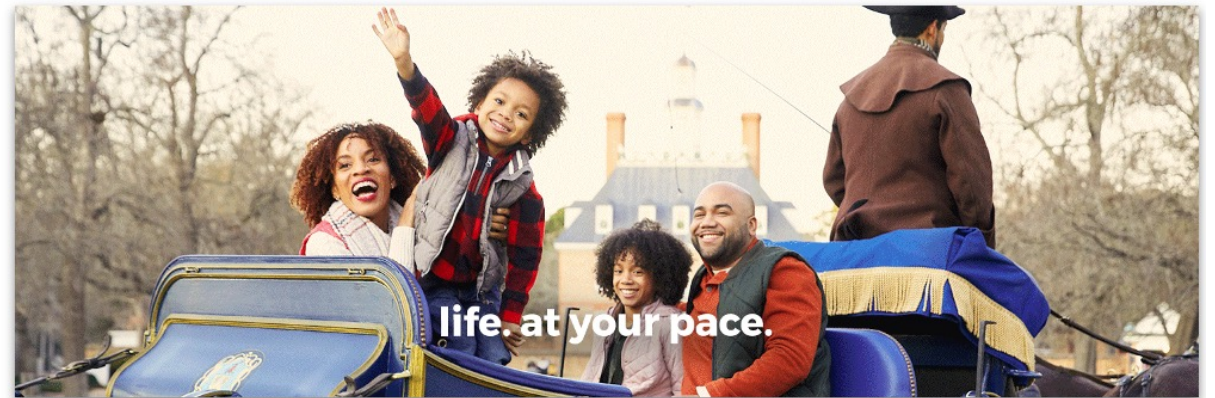
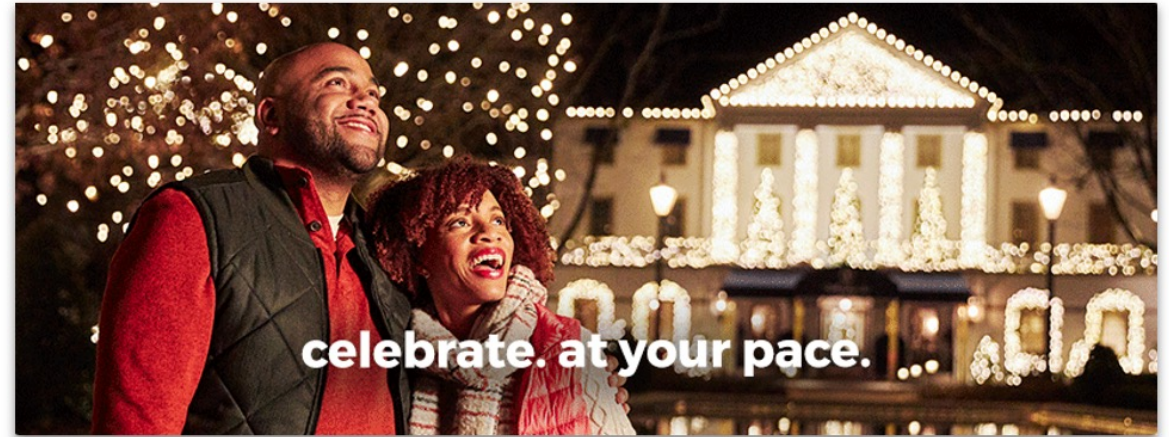
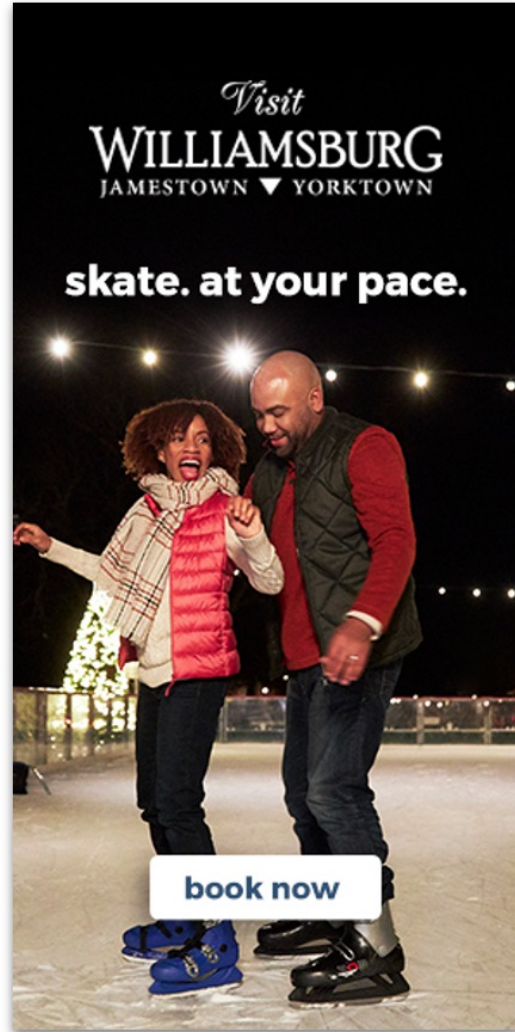
- Boston, MA

Audience Segmentation

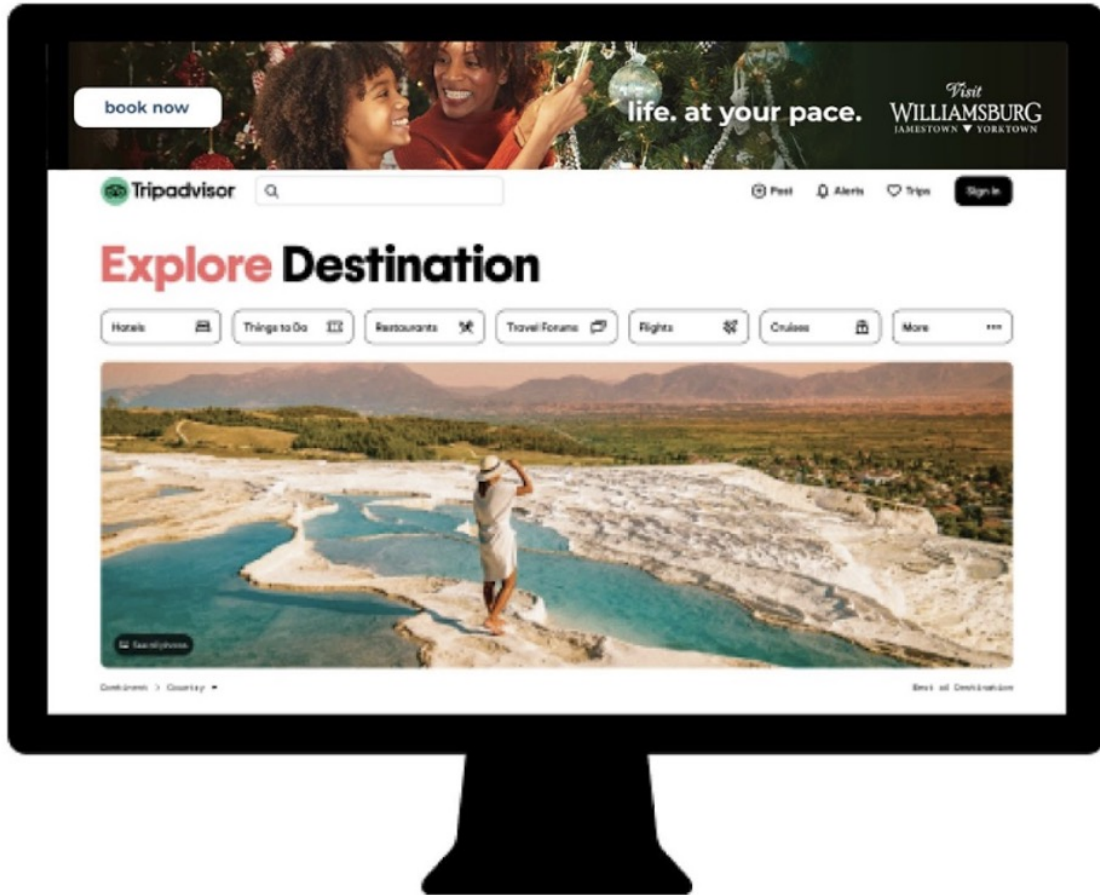


With increased demand moving into 2022, Visit Williamsburg grew new audiences, continued to place emphasis on travel shoppers, and prepared for dramatic shifts in audiences with cookie depreciation.

Holiday Advertising: Sample Digital Creative




Holiday Advertising: Sample Digital Creative



Visit Williamsburg Sponsored Like Page

Cheers to a holiday filled with plenty of things to do and see, and more than a few ways to sit and unwind.




Raise your glass
life. at your pace.

VISITWILLIAMSBURG.COM Book Now

20 311 Comments 562 Shares

Like Comment Share



Sponsored by Visit Williamsburg

holiday. at your pace.

The perfect holiday getaway is waiting for you in Williamsburg. Come eat, shop, play, and be merry — all at your pace.

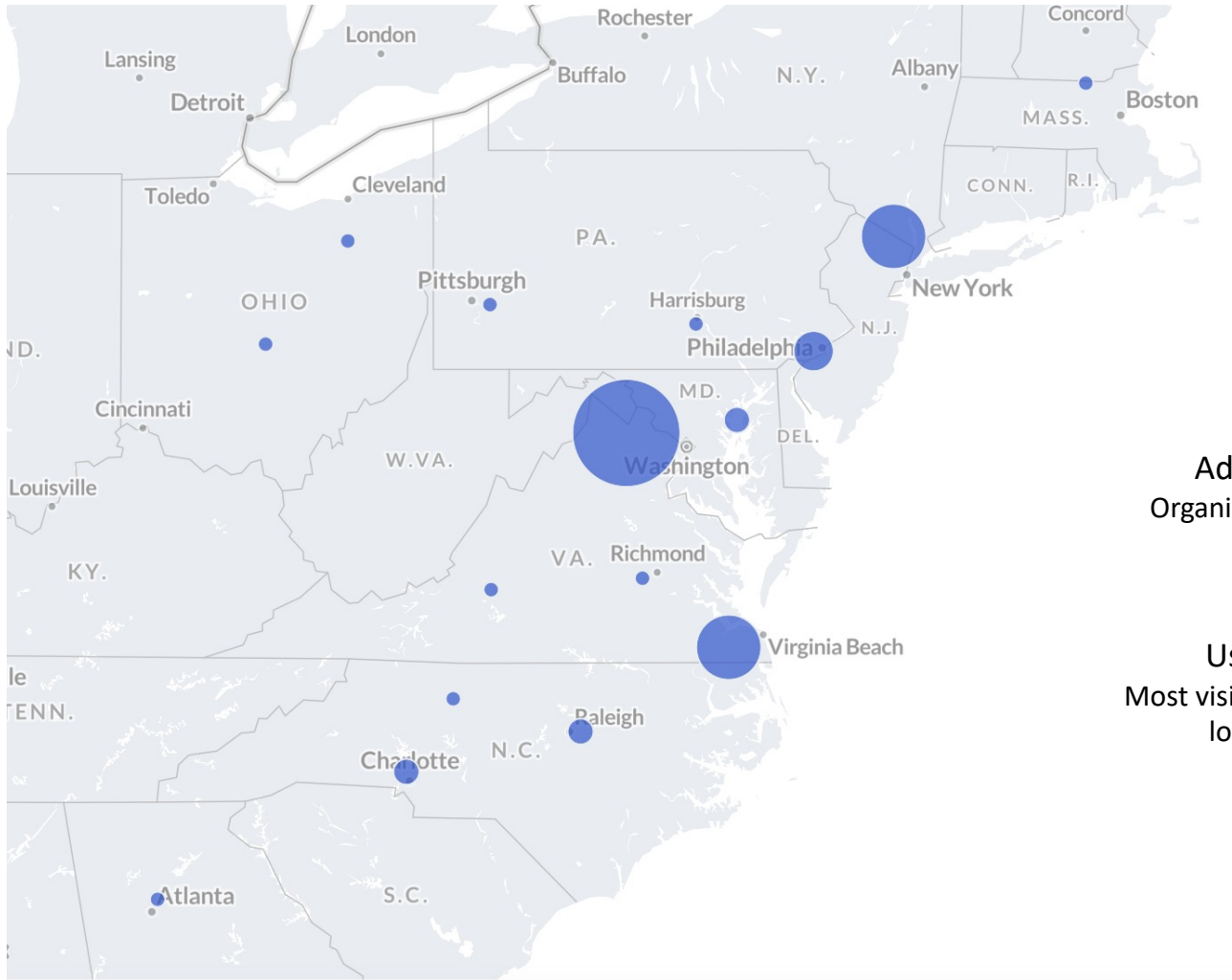
September/October: Digital Advertising Performance

Hotel searches and bookings by advertising audience were strong. With continued market uncertainty and seasonality changes, hotel booking revenue was a bit softer than August. Conversion rate remains strong, confirming we are capturing available demand at a good pace.



*Source: Adara Impact 2022; October data not final until attribution period ends on Nov 30

visitwilliamsburg.com Performance



YTD page views in expansion markets are showing significant performance gains vs. YTD 2019.

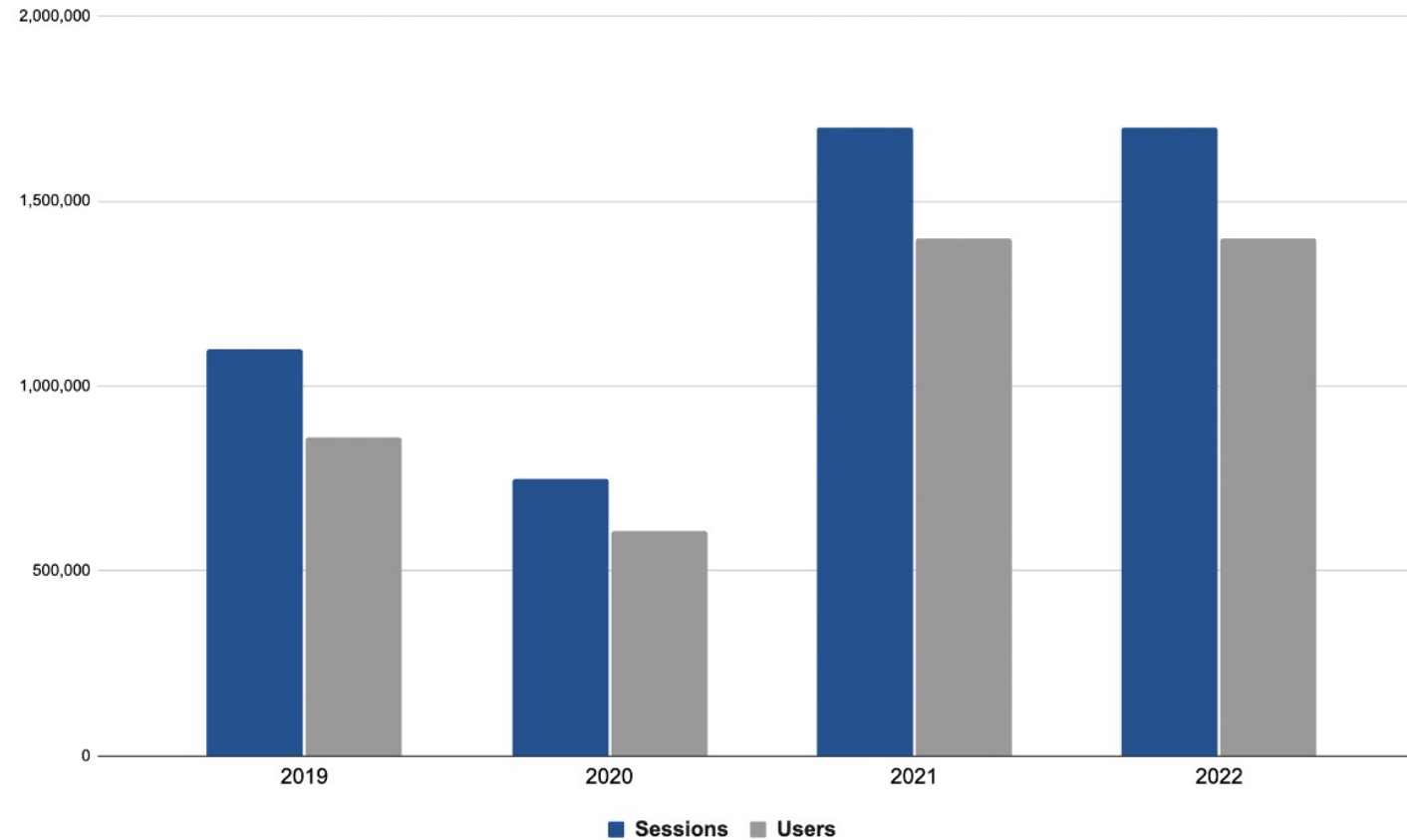
Advertising halo effect:
Organic traffic from these markets is **up 45% vs. 2019.**

Users showing intent:
Most visited pages include attractions, lodging, and restaurants.

	vs. 2019
NY	↑ 486%
BOS	↑ 333%
BAL	↑ 104%
CLE	↑ 472%
PHL	↑ 51%

visitwilliamsburg.com Performance

Since February media launch, site sessions are on par with 2021 and up 52% vs. 2019.
82% of visitors are new to site, up 2% YOY.



September/October: *The WilliamsBLOG* Performance

80K

Sessions



27%

YOY

89%

New Visitors

1.	/blog/fall-happenings	28,586
2.	/blog/fall-love-bed-and-breakfasts-williamsburg-va	14,271
3.	/blog/7-things-to-do-for-first-time-visitors-to-williamsburg	10,565
4.	/blog	9,184
5.	/blog/7-charming-date-ideas-williamsburg	7,012
6.	/blog/8-cozy-things-to-do-williamsburg	6,876
7.	/blog/celebrating-art-design-and-architecture-williamsburg	6,078
8.	/blog/10-great-free-things-to-do-in-greater-williamsburg	6,008
9.	/blog/best-outdoor-escapes-williamsburg	5,669
10.	/blog/15-ideas-long-weekend-getaway-your-kids	5,664



Fall Happenings

[READ MORE](#)



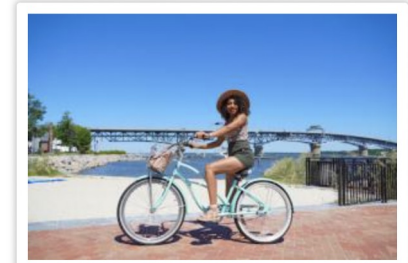
Remembering Queen Elizabeth II and her Ties to Williamsburg

[READ MORE](#)



Drinking up the History Around Williamsburg, VA

[READ MORE](#)



How to Reset and Relax in Williamsburg, Virginia


[READ MORE](#)

September/October: Social Media Performance

Follower Growth

 **1K**
(+112% YoY)

Post Clicks

 **3.4K**
(+39% YoY)

Shares & Saves

 **1.2K**
(+113% YoY)

Video Views

 **57.3K**
(+2,095% YoY)



SHORT-FORM VIDEO IS KING

TOP PERFORMING CONTENT

 [@RioTravelers](#)

Instagram Reels (originally TikTok)
21,000+ views
1,600 engagements
600 shares and saves

TOP-PERFORMING CHANNEL

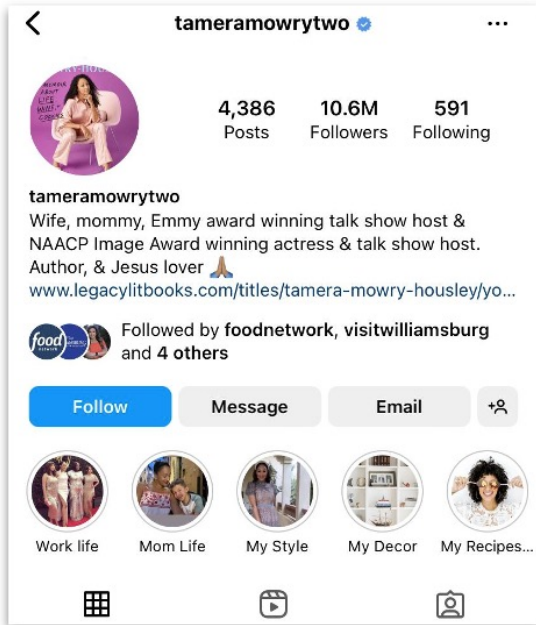
Instagram Reels

Delivers more impressions and engagements
than static photos

The last six videos on Instagram have
53,000+ views combined

Instagram: Mega Influencers

Tamera Mowry-Housley: Actress, Talk Show Host, and Author

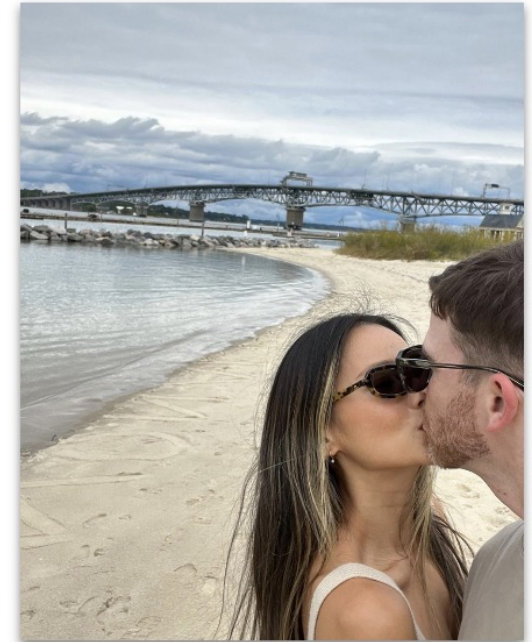
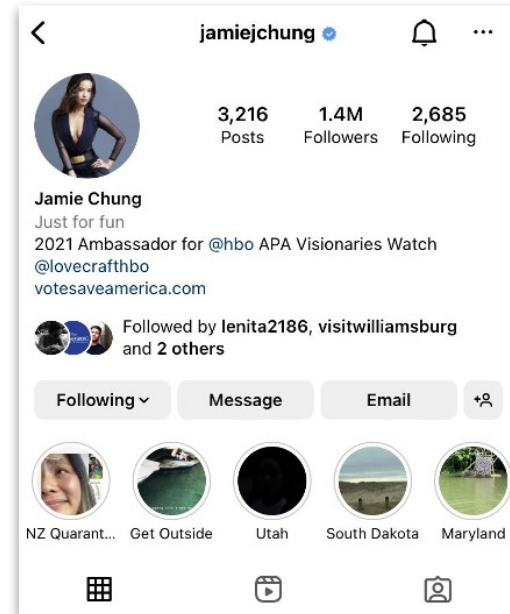


4MM+
impressions

244K+
engagements

300
new followers

Jamie Chung: Actress and Former Reality TV Personality

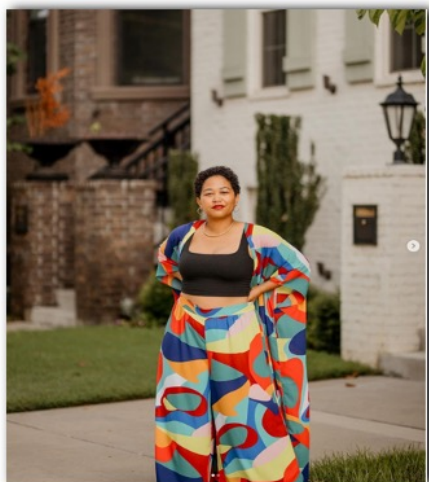


1.2MM+
impressions

48K+
engagements

280
new followers

September/October: Familiarization Tours



TikTok Influencer:
Anela Malik



Writer:
Jim Byers



Travel Influencer:
Monet Hambrick



Writer:
Jason Oliver Nixon



Writer:
Jeryl Brunner

Instagram: Macro/Micro Influencers

More than 20,00 impressions and 1,700 engagements across additional influencer partners.



Coming Up:

[Alyssa Fluellen](#): Relatable family/mom TikTok creator and influencer

[Kav Akpan](#): Travel TikTok creator

[Anna Hartman](#): Exploring Williamsburg from a local's POV

[Anela Malik](#): Food, culture, Black history, biking and waterfront

[Monet Hambrick](#): Fall family activities

[Alina Zubanova](#): Outdoor activities, fairy tale places

[Emily Hoang](#): Date night ideas, things to do under \$50 in Williamsburg, best brunch spots and coffee shops

[Diana Blinkhorn](#): Family-friendly travel

2023 Media Strategy

MEDIA STRATEGY

2023 optimization will provide greater emphasis on key KPIs of bookings and site traffic.

- **Market Evolution:** Lean into core historic markets with greater visibility in broadcast, strengthen recent expansion markets, and integrate digitally into new test market
- **Endemic Lean In:** Increase lower-funnel booking support by bringing in new travel endemics partners for increased visibility among our audiences
- **KPI Refinement:** Continue to test opportunities to own more site traffic by directing greater volume of traffic to Visit Williamsburg versus partner sites
- **Cookieless Expansion:** Integrate more platforms and partners to continue to evolve programs away from cookie reliance

2023 EVOLUTION

	LINEAR/TV	OOH	TRAVEL ENDEMIC
<i>Prioritize</i>	<p>Elevate all markets to linear broadcast, targeting more visible news dayparts locally.</p> <p>Cable will be used as needed throughout, but no longer “cable only” markets</p>	<p>Custom interactive installations in key priority expansion markets for both visibility and awareness.</p>	<p>Endemics overall will take a heightened role in 2023 to lean into bookings amid economic uncertainty.</p> <p>Increase endemic commitments by 33% over 2022</p>
<i>Integrate</i>	<p>Include rotation of :30 units in linear TV in select, newer markets needing additional support to fully establish</p> <p>Lean into increased premium and creative data opportunities in CTV</p>	<p>More streamlined approach to executions across all markets for continuity</p>	<p>More OTA partners for greater reach into lower funnel support and new in-market audiences.</p> <p>Test Adara as a media partner to help improve volume of bookings.</p>
<i>Continue</i>	<p>Flighted strategy to extend campaign duration across all markets</p> <p>CTV use throughout for prime time TV coverage against all audiences.</p>	<p>Baseline OOH awareness levels through traditional and digital OOH channels for support in established markets</p>	<p>Lean on investments with core partners - TA and Sojern - as lead performance generators.</p>

2023 EVOLUTION

	AUDIO	NON-ENDEMIC DIGITAL	EMAIL
<i>Prioritize</i>	Host-read podcast opportunities for authenticity and reach	Select High-Impact sponsorships for awareness and site traffic	Higher frequency deployment to harness significant impact on site traffic and performance
<i>Integrate</i>	Dynamic audio triggers for custom creative	Contextual targeting segments to deeper audience exposure Reach segmented groups (golf, f&b, etc) with relevancy - and protect against cookie depreciation	Greater opportunities to continue to build WTC database through direct sign ups
<i>Continue</i>	Mobile interstitial unit for greatest site traffic impact	Baseline OOH awareness levels through traditional and digital OOH channels for support in established markets	Use as a prospecting tool across broader audience mix, to bring higher funnel audiences in

2023 EVOLUTION

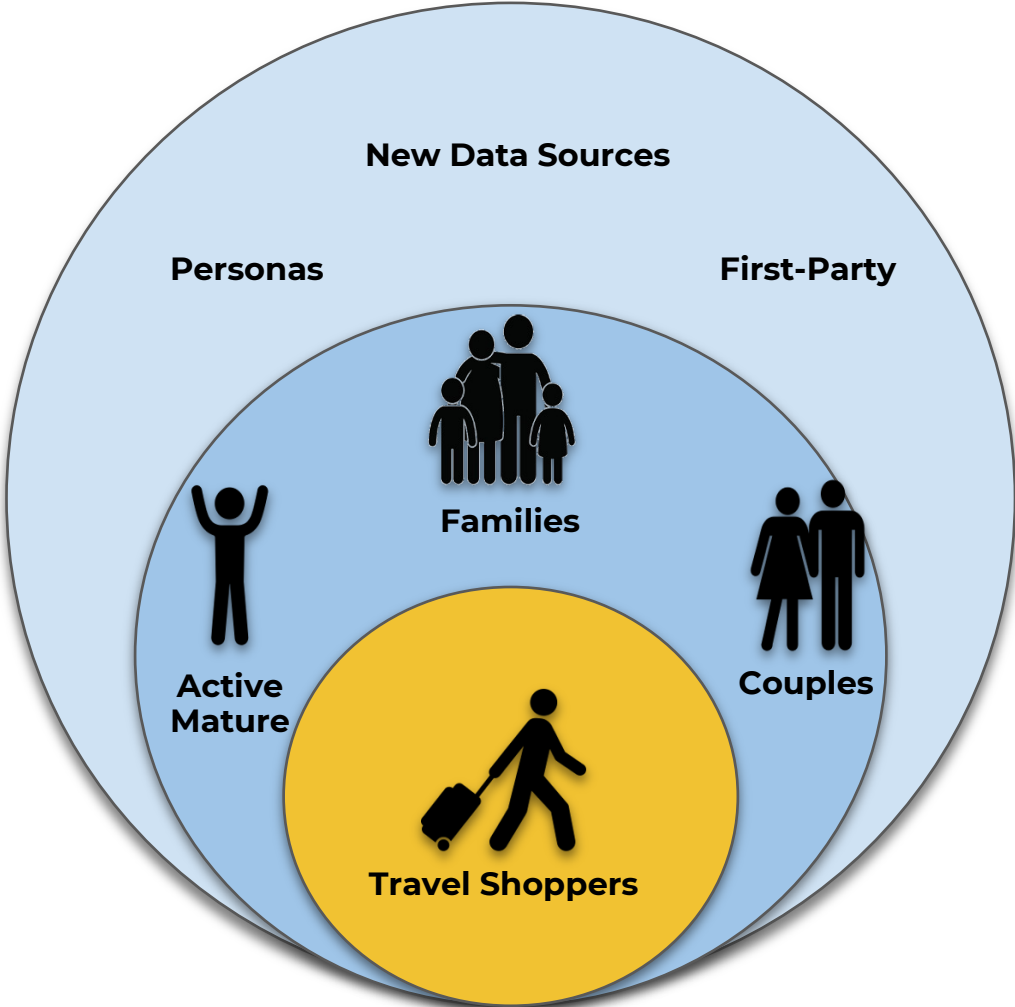
	INFLUENCER	PAID SOCIAL	NATIVE
<i>Prioritize</i>	<p>Short-form video content</p> <p>Interest-based content</p> <p>Authentic storytelling</p>	<p>Larger full funnel experience to social channels, beyond core KPIs and audiences</p> <p>A heavier lean into TikTok</p>	<p>Aggressive traffic-driving strategies to support volume</p>
<i>Integrate</i>	<p>Leverage influencer-generated assets for paid media</p> <p>Utilize learnings from top performing blog and social content to inform influencer-related trip themes</p> <p>Activate influencer partners from key paid</p>	<p>More opportunities for synergy and testing between organic content and paid support</p> <p>Additional testing to focus on benchmarks</p> <p>Additional video assets into TikTok, beyond influencer boosting only</p>	<p>Investigation over campaign of potential shifts and testing of next action steps for additional KPIs - particularly towards mid-point of year</p>
<i>Continue</i>	<p>Tap into the audience and reach of macro and mega influencers</p> <p>Capitalize on the viral nature of TikTok and creator collaborations on the app</p> <p>Leverage the credibility of subject matter experts to create blog content</p>	<p>Support for “mainstream” creative, particularly video, as wide distribution channels</p>	<p>First half focus on site traffic support, as counterpoint to endemic shifts to CPB</p>

MARKET STRATEGY

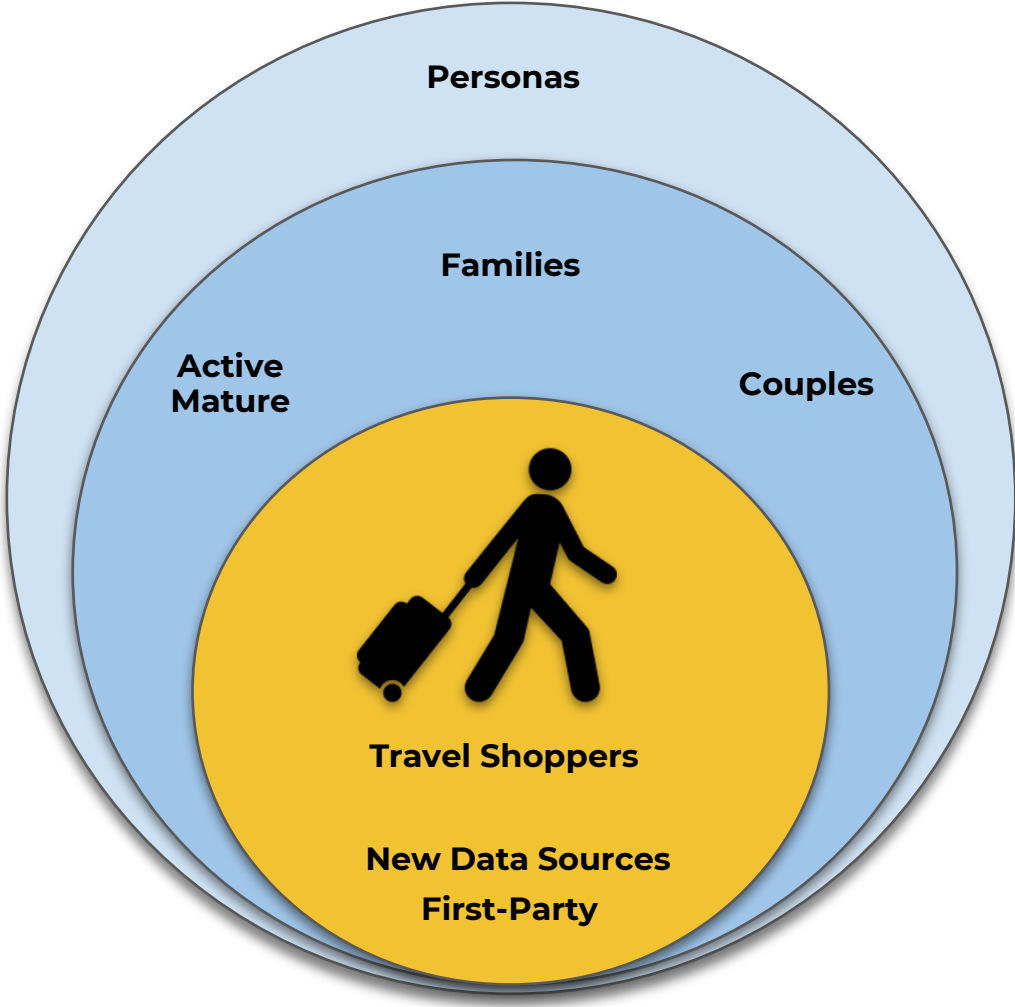
SATURATE	INFLUENCE	ELEVATE	ESTABLISH	MAINTAIN
<p>Maximize potential of strongest organic markets</p> <p>Top 10 organic</p>	<p>Continue to impact markets influenced by paid support</p> <p>Pushed to top 10 via paid efforts</p>	<p>Raise profile in smaller heritage markets</p>	<p>Allow more development time for new 2022 markets</p> <p>Begin testing one new market digitally</p>	<p>Heritage coverage in local feeder markets via digital</p>
<p>Washington DC</p> <p>New York</p> <p>Baltimore</p> <p>Raleigh-Durham</p>	<p>Philadelphia</p> <p>Harrisburg, PA</p> <p>Pittsburgh</p> <p>Charlotte</p> <p>Boston</p>	<p>Charlottesville</p> <p>Salisbury</p> <p>Roanoke</p> <p>Greenville-New Bern</p>	<p>Cleveland</p> <p>Columbus</p> <p>Atlanta (digital-only)</p>	<p>Harrisonburg, VA</p> <p>Greensboro-High Point - Winston Salem, NC</p> <p>Florence-Myrtle Beach, SC</p> <p>Johnstown-Altoona-State College, PA</p> <p>Wilkes-Barre, PA</p> <p>Knoxville, TN</p>

AUDIENCE EVOLUTION

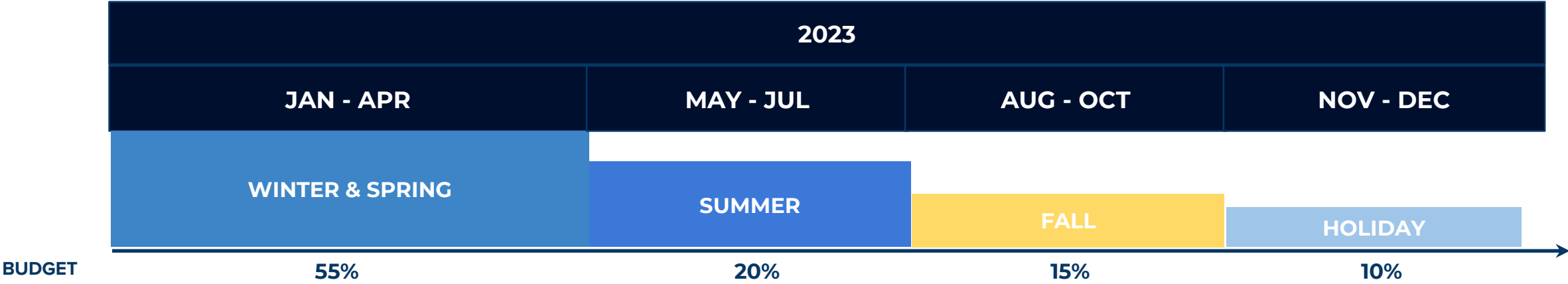
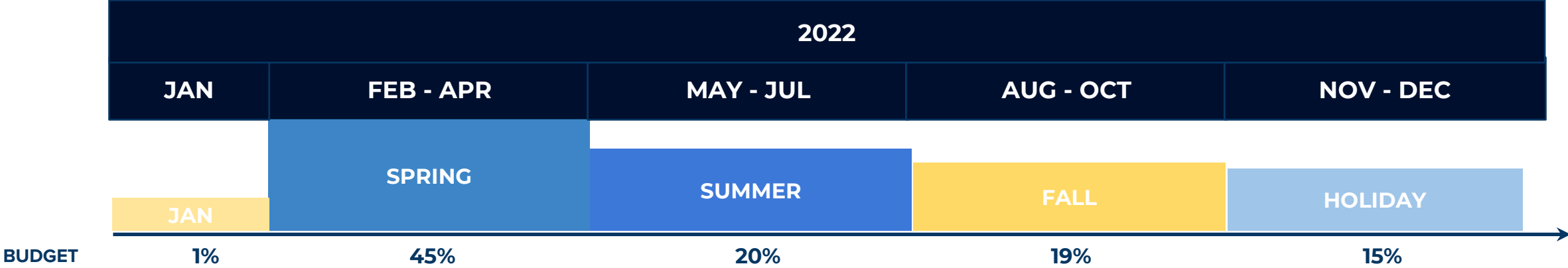
2022



2023

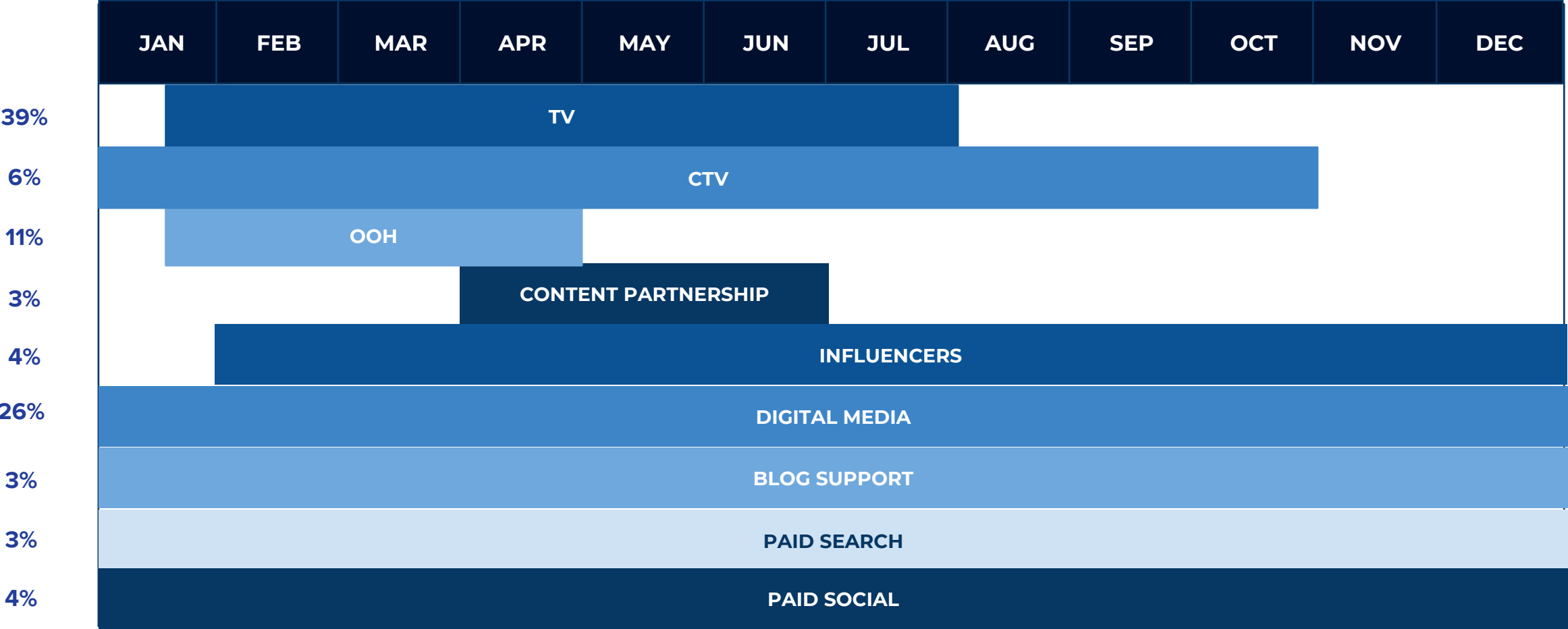


FLIGHTING STRATEGY



**Budgets/timelines provided are rough estimates and subject to fluctuations based on inventory availability and final buy details*

CHANNEL STRATEGY: 2023



**Budgets/timelines provided are rough estimates and subject to fluctuations based on inventory availability and final buy details*

BUDGET

CHANNEL	2023 PROPOSED BUDGET	2022 BUDGET	% OF TOTAL 2023 BUDGET	% VARIANCE YoY
<i>Linear TV</i>	\$5,289,574	\$4,816,005	39%	10%
<i>CTV</i>	\$750,000	\$700,000	6%	7%
<i>Out of Home</i>	\$1,450,000	\$1,423,900	11%	2%
<i>Digital Media</i>	\$3,525,000	\$3,417,857	26%	3%
<i>Content Partnerships</i>	\$340,000	\$340,000	3%	0%
<i>Paid Search</i>	\$415,000	\$415,000	3%	0%
<i>Paid Social</i>	\$587,500	\$587,500	4%	0%
<i>Blog Support</i>	\$400,000	\$400,000	3%	0%
<i>Influencer</i>	\$600,000	\$600,000	4%	0%
<i>Co-Op Program</i>	\$110,000	\$110,000	1%	0%
Annual Renewals	\$120,000	\$120,000	0.88%	0%
TOTAL	\$13,587,074	\$12,930,262	100%	5%

Linear TV: Accommodates additional markets and :30s

- Linear broadcast: Washington DC, New York, Baltimore, Raleigh-Durham, Philadelphia, Harrisonburg, Pittsburgh, Boston, Charlotte, Cleveland, Columbus, Charlottesville, Roanoke, Salisbury, Greenville-New Bern
- Integrate :30s into expansion markets - Boston, Cleveland and Columbus (50/50 blended rotation)

CTV: More premium inventory during prime time

- Direct buy with Roku during prime time hours only
- Data-Driven Creative test with Tremor

OOH: Utilizes “custom” interactive executions

- Primary: New York, Philadelphia, Boston
- Support: Washington DC, Baltimore, Cleveland

Digital Media: Integrates new partners, greater coverage of travel endemics

- Test partners
 - Priceline (Travel Endemic)
 - GumGum (High Impact)
 - StackAdapt (Contextual)
 - Smartless (Podcast)

Public Relations

September/October: Earned Media

Global Impressions
1.4 Billion

36
Placements

*YoY 2021 – 724 Million Impressions & 24 Placements

Key Media Placements | September 1 – October 31, 2022

“Virginia’s Best Fall Activities, From Ghost Tours To Halloween

Happening”

-[Kaeli Conforti](#)

Forbes

“40 of the Prettiest American Towns to Visit During the Winter”

-[Stephanie Waldek](#)

TOWN&COUNTRY

“32 Best Places to Go for Thanksgiving in America”

-[Arricca Elin Sansone](#), [Taysha Murtaugh](#), [Janaya Wecker](#)

Chal Daily

“20 best Christmas getaways for the ultimate winter escape”

-Sarah Lemire

 **TODAY**

“This Former Ballerina Continued The Legacy Of A Female-Owned Coffee And Tea Shop In Yorktown Dating Back To The 1800s”

-Jeryl Brunner

Forbes

September/October: Earned Media



Local Businesses Among Nominees For VRLTA's Ordinary Awards

By Brandy Centolanza September 23, 2022

Meanwhile, Victoria Cimino, CEO of the tourism organization Visit Williamsburg, has been named a finalist for the Jim Ricketts Award DMO/CVB Employee of the Year recognition. The other two nominees in this category are Lisa Meriwether from Discover Danville and Brande Rumpf Virginia Beach Convention & Visitors Bureau(CVB).



THE VIRGINIA GAZETTE

Travel trends could be good news for Williamsburg

By Stan Wilkerson
Virginia Gazette • Sep 23, 2022 at 9:02 am



On beautiful days, beach-goers fill the street between Williamsburg's quaint shops. (Stephen M. Katz/The Virginian-Pilot)

In other business at Tuesday's meeting, Visit Williamsburg CEO Victoria Cimino reported that so far this year, room occupancy, average daily rate and revenue per available room are all up compared to 2019. The average daily rate is a metric used to indicate the average revenue earned for an occupied room on a given day.



Lifestyle

40 of the Prettiest American Towns to Visit During the Winter


Discover skiing, Christmas lights, and more.

By Dakota M. Smith Oct 24, 2022

Williamsburg, Virginia





Learn all about American history at historic Williamsburg, particularly at Colonial Williamsburg's living history museum, which gets quite dolled up come December. Time your visit right and you might be in town to experience a few flurries—though Williamsburg only gets a few inches of snow each year, the town is full of holiday cheer.



ADAM MENDLER


MODEL THE WAY: INTERVIEW WITH VICTORIA CIMINO, CEO OF VISIT WILLIAMSBURG





Travel site names Williamsburg among the best historical cities to visit

By Willard Kalle
Virginia Gazette • Oct 12, 2022 at 10:00 am



At the Capitol building, Colonial Williamsburg. (Posted by wryynald, Community Contributor)

"For those of us who call Williamsburg home, it's no surprise that the region continues to be recognized and honored with tremendous accolades," said Victoria Cimino, chief executive officer of Visit Williamsburg.



20 Best Christmas Getaways - Christmas Vacation Ideas

SARAH LEMIRE
September 16, 2022

Williamsburg, Virginia



Christmas Town, Williamsburg, Virginia (Susan Gardens Williamsburg)

September/October: Accolades



2022 READERS' CHOICE AWARD
Best CVB/DMO

TRAVEL WEEKLY
MAGELLAN AWARDS

TWO GOLD
Blog and Television Commercial
&

TWO SILVER
Social Media and Advertising/Marketing Campaign

Sales

September/October: Shows and Events

DATE	UPCOMING SHOWS	LOCATION
October 2 - 4, 2022	Small Market Meetings Conference	Wichita, Kansas
October 9 - 12	Capital Region USA Global Market Exchange	Washington, DC
October 24 – 27, 2022	TEAMS	Oklahoma City, OK



September/October: New Business Leads

ISSUE DATE	LEADS	ROOM NIGHTS
9/7/2022	Grand Classroom – Providence Academy	30
9/15/2022	American Edventures – AE 173	36
9/15/2022	American Edventures – AE 141	50
9/22/2022	Virginia Air National Guard – Yellow Ribbon	60
9/29/2022	Rush Family Reunion	40
10/5/2022	Virginia Polytechnic Institute and State University	115
10/12/2022	Wood Family Reunion	75
10/12/2022	Carolina Cotton Growers Cooperative	235
10/19/2022	National Baptist Deacons Convention	1000
10/19/2022	Society of Lake Management Professionals	255
10/19/2022	International Jugglers’ Association	960
10/19/2022	International Jugglers’ Association	960
10/19/2022	Brooklyn Latin School	82

September/October: New Business Leads

ISSUE DATE	LEADS	ROOM NIGHTS
10/20/2022	William Diamond Junior Fife & Drum Corps	90
10/25/2022	Fullington Trailways	64
10/27/2022	Integrated Agribusiness Professionals	235
10/27/2022	Living Church of God, Inc.	140
11/03/2022	Macon County Farm Bureau	60

September/October: Service Leads

	SERVICES LEADS	
10/12/2022	Viajes A +	Guide Service
10/12/2022	Viajes A +	Meals
10/27/2022	Old Dominion SGMP	Entertainment
10/27/2022	Virginia Polytechnic Institute and State University	Attractions

September/October: Definite Bookings

Arrival Date	Definite Booking	Property	Room Nights
10/18/2022	Viajes A+ Educational Tours	The Woodlands	112
10/23/2022	Legacy Tour and Travel	The Woodlands	100
11/29/2022	Wendt Tours	The Woodlands	108
07/06/2023	Firecracker Sports	Great Wolf Lodge	200
06/25/2023	Virginia State Courts	Holiday Inn & Suites	125



Upcoming Shows and Events

DATE	UPCOMING SHOWS	LOCATION
11/13-17/2022	National Tour Association Travel Exchange	Reno, Nevada
11/27-30/2022	Travel South International	Louisville, Kentucky
1/16-20/2023	SYTA Summit	Anaheim, California
1/24-26/2023	RCMA EMerge	Chattanooga, Tennessee



Old & New Business

Adjourn

Next Meeting: January 17, 2023

Visit
WILLIAMSBURG
JAMESTOWN ▼ YORKTOWN