

WILLIAMSBURG TOURISM COUNCIL

Qualitative Research Findings
Traveler Focus Groups
May 2020

AGENDA

1. OBJECTIVE AND METHODOLOGY REVIEW
2. AUDIENCE REVIEW
3. PRIMARY RESEARCH FINDINGS
4. IMPLICATIONS
5. NEXT STEPS

RESEARCH OBJECTIVES

- Explore the behaviors and underlying emotions that drive domestic destination consideration and affinity
- Identify common journey points , sources and sequences
- Explore the effects that COVID-19 has had on anticipated travel plans



The findings are part of an initiative to inform audience segmentation, digital customer experience, media decisions and creative messaging.

APPROACH

Secondary Research

Secondary traveler segmentation research:

- GfK MRI
- Mintel
- Phocuswright
- Skift
- Deloitte
- Other secondary sources

SMARI Traveler and Visitor Profile Research

Opportunity Segment ID

Identify mindset and attitudinal macro and micro segments based on existing research.

Qualitative Research

Conduct (9) 90-minute focus groups to further define audience segments as well as layer actionable media and journey behavior.

Outputs

- 3 consumer personas and 1 journey
- Insights to inform ongoing creative campaign messaging and media decisions

WHO WE SPOKE WITH

- (9) 90-minute focus groups, with 5-7 participants each, were recruited through SMARI and moderated by Connelly Partners between May 5 and May 7, 2020.
- Participants were recruited by SMARI from various geographic target markets. There were 3 dedicated groups per each attitudinal audience segment.

REVIEW OF MICROSEGMENTS

MINDFUL APPRECIATORS

SIMPLE STRIVERS

They value simplicity, ease and transparency above all else in their travels from planning to experiencing. So by nature, they're more willing to outsource their decision making to trusted parties to avoid extensive research. The purpose of their vacation is to recharge and reconnect.

CULTURE QUESTERS

They use travel as an opportunity to break themselves from their home lives and instead learn something new. As such they enjoy visiting museums, historical sites, arts and culture.

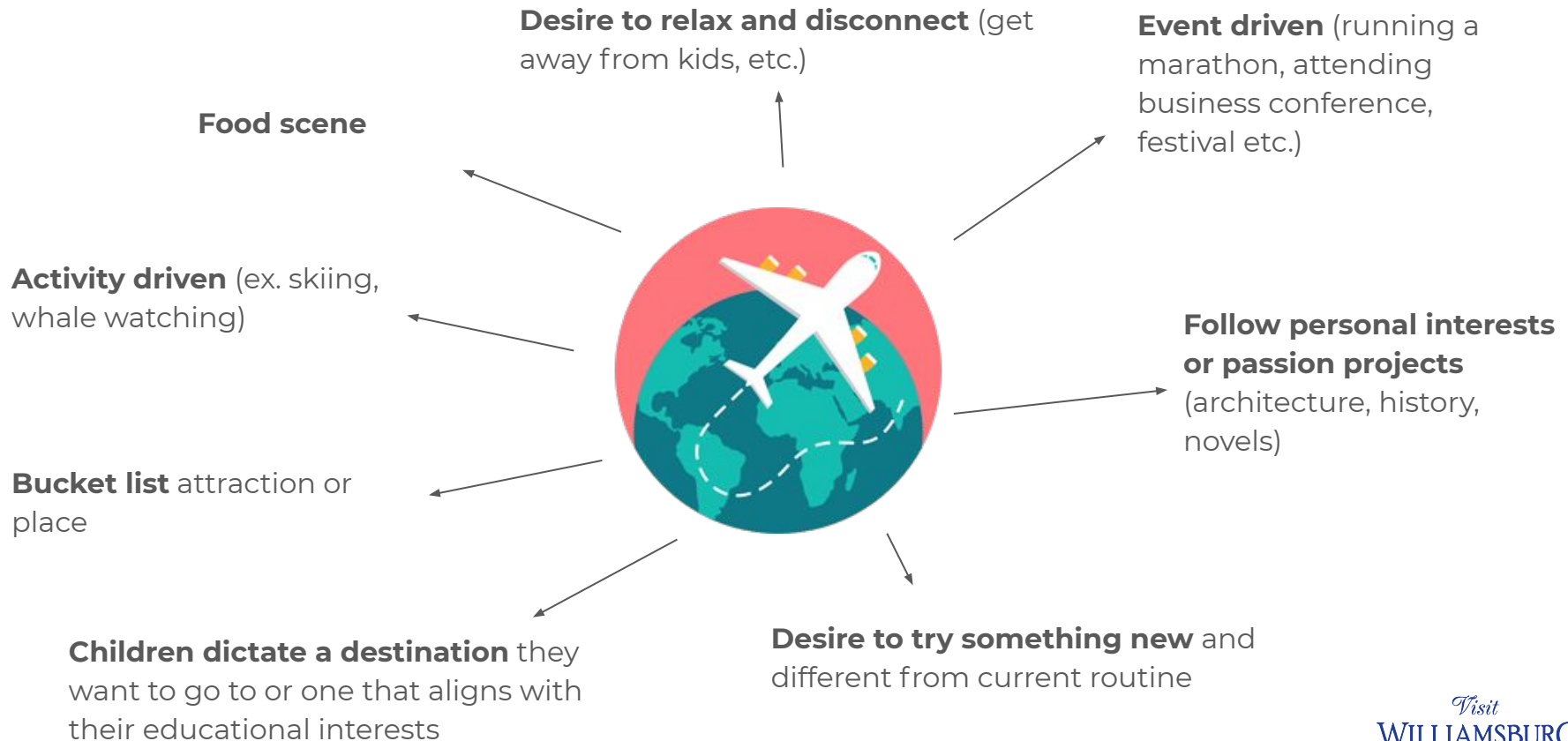
Parents, in particular, want to use this time to incorporate educational elements for their children's sake.

SEE-ERS & DO-ERS

They're travel maximizers. This group loves to be entertained by the sights and experiences. They're often celebrating a milestone or simply exploring a new place. They view being an experienced traveler as an enviable quality, thus they're using social media not just for sourcing travel inspiration, but to showcase their adventures.

PRIMARY RESEARCH FINDINGS

Collective Motivations to Travel



Why go back to the same destination?



The vacation was superb, it exceeded expectations and the memories are so joyful that they feel a pull to relive them.

“It was so successful, that we’re like why mess with success. Because it’s not always a guarantee that you’re going to find that result again.”



The destination offers an abundance of activities, requiring a second trip to accomplish it all.

“We feel like we didn’t get to see it and do it all. We wanted to spend a little more time going to the beach and parks. We also feel that there are a lot of good restaurants and didn’t feel like we got to eat at all.”



A desire to go back to a nostalgic destination from their past, but this time, they’ll share it with new travel companions.

“A connection to memories and relive and sharing with our daughter things we did as a kid, that’s for us why we go back to places”

But not everywhere or everything is viewed as repeatable

Mainstream bucket list attractions or sights, such as the Statue of Liberty, are not viewed as something to go back to multiple times by the majority of people. On the other hand, the more experiential elements of a destination, where travelers interact with each other and the place, are perceived as repeat-worthy, especially if they are with new travel companions.

- *“I’ve been to NY before. **How many times can you see the Statue of Liberty?** I like to do more outdoorsy things too. I can go back to that same water rafting place because it’s something you’re doing and it’s a fun day...I guess I am a do-er, so I want to go places I can do stuff and not just walk around and look. **Activities like rafting, they could change even based on who you’re with.** Rafting with a different group of people will be a completely different experience.”*

Simple Strivers are more likely to be repeat visitors

As passive travelers, it's not surprising they tend to be repeat visitors of familiar destinations. It's easier than finding a new destination, there's no need to plan an itinerary and it requires a shorter lead time.

They cite **a sense of familiarity, security** and even **routine** to be a comforting element of what keeps them going back. Part of this **comfort also comes from knowing you will be returning**. There's no need to stress over a jam packed itinerary if you know you will be coming back.

*"We have a good routine down too. A big part of it is **there's no planning to it**. We know what restaurants we want to eat at. We'll switch it out if we want to try something new. **Everything is a routine.**"*

*"Miami is one of the places we go to and we actually used to live there. Part of it is going back and **reliving some of those experiences.**"*

*"South Carolina...it has great weather in the summer. Offers flexibility in that you get a house, the whole family is there. Has **traditions that have been set in place**. Provides simple fun, good weather, good beaches."*

Whereas Culture Questers and See-ers & Do-ers thirst for something new

Culture questers are more inclined to find rich experiences in new destinations. They're driven by a **desire to learn or experience something outside of their norm.**

- *“Having a headquarters or having multiple things to do is pretty important. It's one of the ways we **try to guarantee having a richer experience.** At least having the ability to go deeper is something we look to. And varying it up is another component of it. We always try go to different places and try to purposely stir away from that.”*
- *“I don't think I've been on a repeat trip in a while.”*
- *“**We're looking to do something intellectual** - visit museums, monuments, things that we're gonna have a learning experience.”*

See-ers & do-ers also placed an emphasis on wanting to go to a new destination, because **the novelty of something new is where they derive their entertainment** and enjoyment.

- *“I basically like to go somewhere that's new. **As long as I have people that want to go there and experience something, I haven't been there before, I'm willing to try it.**”*
- *“I would say, I like having novelty, things that you don't see a lot.”*

Perceptions of Williamsburg

Family oriented, but better for older children:

- *“Perfect size for a family so talking about crowds - it never seems to have a crowd that’s overwhelming”*
- *“You have to had a kid who’s going to be interested and not completely bored. They have to be old enough to pay attention.”*

It’s a snapshot of history, which is appealing to many travelers, yet not necessarily the sole driver of the trip, especially if there are fellow travelers (kids or spouse) that you have to appeal to:

- *“I was actually a history major so that’s the big draw for me.”*
- *“The history aspect is an added value. The driver is usually somewhere we haven’t been and can enjoy being in nature. But whenever we stop some place and it is known for something, we like to experience that.”*
- *“History is important, if its there but it’s not the primary driver.”*

There’s a variety of fun things to do that everyone can enjoy:

- *“I think there’s plenty to do. I went during 4th of July, lots of parades, things to do, weather is usually good in the summer. Busch gardens.”*
- *“Been there 5-6 times during the course of my life and it’s pretty great with what we’re looking for right now with all those metrics. Particularly walking around the old town and taking the tours. It’s fantastic. Busch gardens is cool too.”*

The appeal for drive-to destinations will only grow

Drive-to destinations provide travelers with more flexibility and net more repeat visits:

- *“We’ll drive to certain places multiple times a year if it doesn’t feel touristy. We like places that have a casual feel to them.”*
- *“I like the freedom of packing the car and just deciding to go at the end of a long week with little to no planning.”*
- *“Places that are good for repeat visits are constantly changing: new shows, new rides, new exhibits. It has to feel fresh to get me to go back again.”*

The circumference defining acceptable driving distance will expand in a post-COVID-19 world. Generally the prior acceptable drive distance was 4 - 5 hours. Post pandemic, it is expected to be 6-8 hours of drive time on average.

- *“I won’t be getting on a plane anytime soon. That’s for sure. I’ll be driving to my vacations.”*
- *“Definitely somewhere driveable. I’m not looking to fly anywhere long distance in the future.”*
- *“I’m looking for places that are drivable that I can limit my exposure. And stay in one location, like Airbnb.”*

The Typical Journey

Development and narrowing down of a “short-list” of places they want to go

“In terms of choosing the destinations, there are far more that have made it to our shortlist than we have time to actually visit.”

“For us, some will depend if there’s a specific event we want to go to.”

“I have a running shortlist of destinations that I would like to go to. With that in mind, I am always monitoring flight saving websites and tools like that for destinations on my shortlist.”

Deciding when to go for some is more restrictive

“Usually depends on our availability. The summer. That’s because of my wife’s schedule who works in education.”

“We are spontaneous in the sense that if we have time off, we’re able to just get up and go.”

Lodging and Travel Research and Booking

“TripAdvisor to get an idea of hotels then search Marriott because that’s the chain we have the most points. Start with Expedia for air flights and compare what he finds individual websites.”

“4-6 months we out start searching for flights around the dates we need to be there. Google flight alerts before making a decision.”

“If it’s not a direct flight, I might not book”

Activity & Food Scene Research

“We did some research on what to do there, what’s in the area and try to center around hiking and breweries.”

“I talk to friends or family who have been there. My coworker told me about donkey rides and having to book them in advance. I look at a lot of different sources.”

In-trip research

“Ask hotel for recommendations for restaurants and things to do. Grab “what’s happening” or local newspaper to see what events - comedy clubs or breweries.”

“We try to do a city tour when we go to any city. We do that the first or second day so we get an idea of what’s out there and if there’s something we wanna go back to.”

Journey Nuances

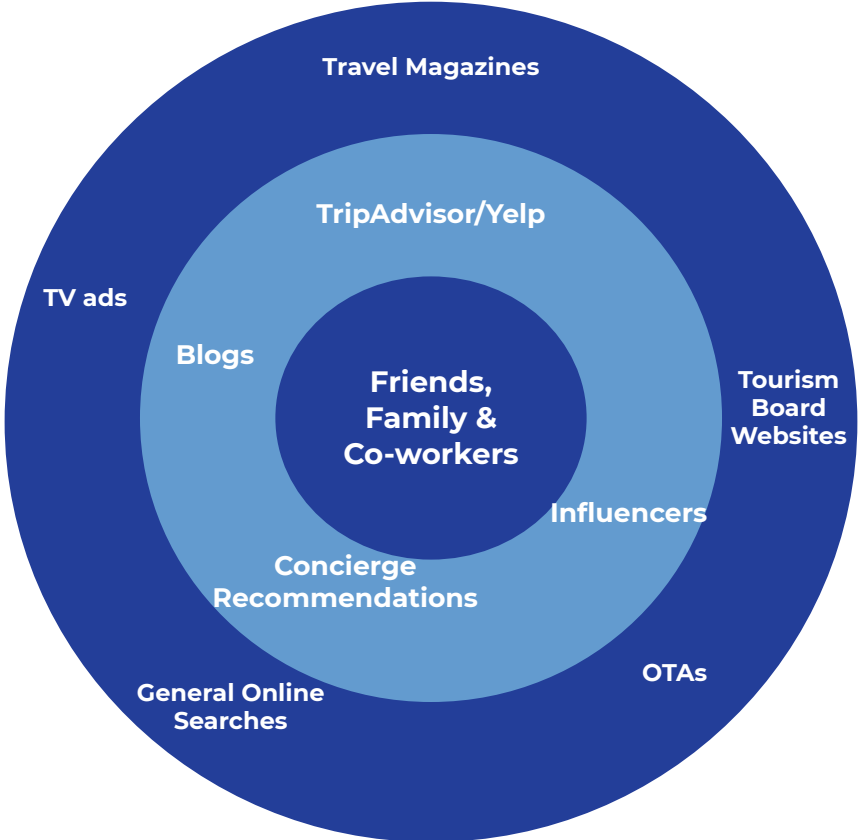
True to their identity, **Culture Questers** are **resourceful and willing to spend more time researching travel**. They are the most likely to say they use third-party websites to look at what's available (despite almost always booking directly with the airline or hotel). They're very engaged with reward and loyalty programs, using points for travel.

Planning for **multi-generational trips** or big family trips tends to look a little different:

- There's typically a **longer lead time** of up to a year.
- A **big family meeting** takes place as part of the planning process. or big family
- Things like **lodging or transportation need to accommodate everyone**

See-ers and Do-ers travel for excitement and entertainment. While they will research fun things to do ahead of time, part of the novelty of their trip is discovering hidden gems during their time in the destination. As such, they may **leave room in their itinerary for unpredicted exploration**.

Inspiration/Research Sources and their Influence



There's room for improvement among tourism board websites

Generally, people will use tourism board websites after they have already booked, to discover activities, especially if they are unfamiliar with the location. However, it's not the first or only source they use, as **there's a sense of distrust**. They're more interested in getting advice from more authentic sources where they can hear recommendations from "real people".

- *"It's hard to decipher if someone paid to have something promoted"*
- *"At times it's hard to tell what's a promotion."*
- *"When we are looking for opinions on a particular destination...I feel like you can get a better answer from people who have been there."*

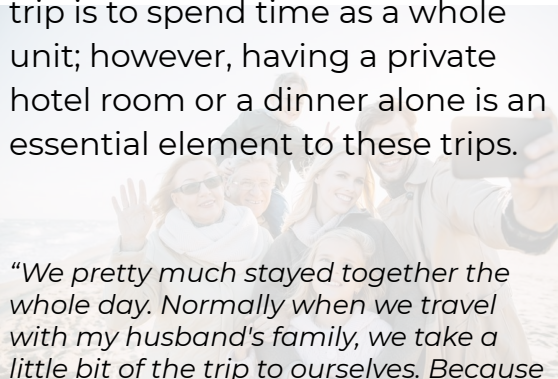
While they do admit they use the site to look at the calendars & events pages, to see if anything fun will be happening while they're in town, **many destinations' sites have outdated or inaccurate event pages** that end up getting abandoned by the traveler.

- *"I usually check because of the calendar, if there's a food festival or something that wouldn't cross my path otherwise."*
- *"I always go to the city tourism website calendar and they're usually terrible. But that's a starting point if you want to be there during a certain festival...I wish the city websites were more helpful. Sometimes calendars aren't up to date."*

Some standouts by traveler type:

MULTIGENERATIONAL FAMILIES


Many of the activities are done together, as the purpose of the trip is to spend time as a whole unit; however, having a private hotel room or a dinner alone is an essential element to these trips.



"We pretty much stayed together the whole day. Normally when we travel with my husband's family, we take a little bit of the trip to ourselves. Because it is our vacation too so we branch out. We usually stay in a different hotel so we get our own time."

COUPLES

The freedom from schedules, walkability to everything and relaxing alone time is particularly appealing to couples.

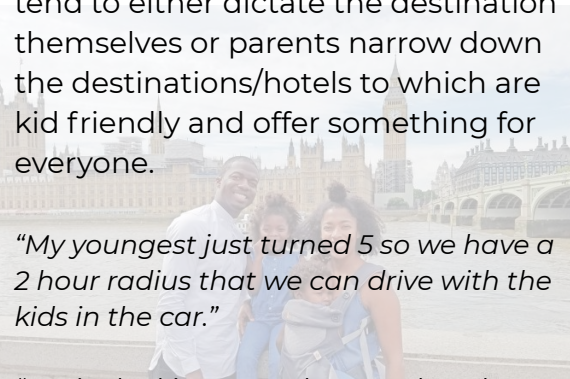


"We look for a few great restaurants and bars that we can walk to from our hotel. We love places that feel very casual and relaxed."

"We stay at the Hershey hotel and find that the draw for us is that it's intimate. There's a nice spa, we get to relax. Have us time. Holiday lights, sweet show."

YOUNG FAMILIES

Children are extremely influential in the decision of where to go. They tend to either dictate the destination themselves or parents narrow down the destinations/hotels to which are kid friendly and offer something for everyone.



"My youngest just turned 5 so we have a 2 hour radius that we can drive with the kids in the car."

"You're looking to make sure that the kids are gonna be safe and taken care of."

"75% of the time my son is expressing an interest in a destination."

Post-pandemic travel concerns

When it comes to traveling after the pandemic, the majority of people will approach with hesitation.

- They will have a preference for **weekend trips within driving distance vs. extended trips with air travel.**
- They will also have a propensity for **outdoor locations that are less crowded** with people.
- And finally, they're still suffering from the **PTSD of their cancelled trips**, and will not be booking anything that's non-refundable.

*"I **wouldn't fly currently** and can't take that risk because I think we have a second wave coming and it's just beginning."*

"I would reserve any extended long-distance trips or duration trips to be limited to family"

*"As much as I want to make plans, I think there's a bit too much in the air. So **we're looking at a domestic road trip.**"*

"I've had 3 trips cancelled between work and personal"

Post-pandemic travel concerns

However, at the other end of the spectrum, there are people who are less concerned about the virus or simply want to regain control over their life choices.

- They're so stir crazy they'll do anything to get out of the house. If the government says its ok to travel, they'll be going.

*"After having been stuck inside for many weeks now, **I am looking forward to going anywhere that is not my house or the grocery store.** I think once its safe to go, local authorities and gov't authorities say it's on the decline, I think we're looking forward to going anywhere we can."*

*"I would certainly use hand sanitizer and wear a mask and do whatever they ask me to...but **I am not scared away by most of this stuff so it won't change my opinion about where I would go.**"*

IMPLICATIONS

Implications

1. Shifting **from educational historical sites to learning and experiencing new things** more generally
 - a. Most travelers and particularly culture questers, express a desire to learn or experience something new while on vacation. By broadening beyond the historical attractions of Williamsburg to experiential elements, like riding a Segway along the river, learning how to roast coffee beans or discovering how wine is made, we can broaden the appeal of the destination to a larger population of people.
2. Painting Williamsburg as a **destination where you can relax and escape the hustle and bustle of dense major cities** will appeal to more than just Simplicity Seekers post COVID-19, as all travelers seek out less crowded, safe destinations.
3. Simple-strivers and, to some degree, see'ers & do'ers love destinations where they can 'go with the flow' (their mood and the weather can dictate the appeal to certain activities). Having site content that buckets **suggested activities based on both mood and type of day** can help reinforce the 'life at your pace' platform and be very functional for in-trip idea sourcing.
4. Dialing up the **range and uniqueness of food & bev assets** is a key component to generating more adult-only trips and overall repeat visits.
5. Whether it's history, culture or thrill parks, there needs to be fresh site and native content that **highlights the constancy of (programming)** change across all four seasons to earn Williamsburg a repeat-worthy reputation.

NEXT STEPS

NEXT STEPS

- CP to share completed and fully designed personas and journey w/ WTC w/o 5/18
- CP Strat Planning will review both docs with each CP department to ensure proper application of data.