Colonial Williamsburg
Marketing Research Proposal

Team 2 – Caitlyn Hetrick, Josh Johnstone, Dave Knapp, Sunny Soni, Stacia Heard

May 2025

Raymond A. Mason
School of Business

WILLIAM & MARY

Table of Contents

Overall Business and Marketing Situation

Situated in coastal Virginia, Colonial Williamsburg is the largest living museum in the world. The site covers hundreds of buildings and operates as a snapshot of pre-revolutionary and revolutionary life in what would become the United States of America. Through period actors, called interpreters, traditional trades and traditions are perpetuated in the open, available for visitors to engage and interact with. A non-profit institution, their dedication to preserving material culture, conducting ongoing archaeological and archival research, and public education, is summarized by their mission statement, "That the future may learn from the past". According to publicly available tax filings, their revenue in 2023 was over $125.85 million, most of which came from private donors (Ferree, 2024).

Although Colonial Williamsburg holds the title as world's largest living museum, they have stiff competition from other blockbuster museums in the Mid-Atlantic region and local entertainment venues. In a twenty-mile radius, Colonial Williamsburg must contend with the other two points in the 'historic triangle', Yorktown and Jamestown, both of which are operated by the National Park Service. Also in this radius, the Busch Gardens amusement park is a major draw for people looking to fill their free time. Outside of the immediate area, Colonial Williamsburg competes with the Smithsonian Institution's portfolio of museums in Washington D.C. Additionally, a major competitor for potential visitor's attention is streaming services and other at-home activities, especially in a tightening economy where households have less disposable income (*Our Organization - Colonial Williamsburg*).

The Colonial Williamsburg Foundation wants to know, "***How do we position Colonial Williamsburg at the center of conversations about America's founding, and how do we use those conversations to foster a more engaged and informed citizenry***." To glean insights into this, our team has developed a research proposal centered around the following hypothesis: ***Adults return to tourist destinations they visited as a child***. Therefore, Colonial Williamsburg should identify the experiences or features that make it the most appealing to returning visitors. While not necessarily a novel idea, we see this as a crucial group that will help '*foster a more engaged and informed citizenry*'. In the following pages, we will outline:

a. Exploratory Marketing Research Initiatives
b. Descriptive Marketing Research Initiatives
c. Predictive Marketing Research Initiative
d. Research Timetable

Exploratory Marketing Research Initiatives

Initiative 1: *Ethnographic Observation of Families at Colonial Williamsburg*

Objective: Understand how intergenerational tourism plays out in real time.

Target Population: Families who visit CW with one or both adult parents having visited CW previously. If possible, also research families visiting Jamestown and/or Yorktown National Parks. Families would ideally include at least one child aged 5 to 18.

Methodology: Observe and informally interact with families as they experience CW.

Identify verbal cues and interactions that suggest repeat visitation (i.e. re-living an experience). The overall outcome of the observation is to uncover the patterns that prompt adults to bring their children to places they visited themselves.

Observations will be conducted onsite at CW during both peak and off-peak times to maximize diversity of experiences. To ensure a non-intrusive observation, no attempt to guide the family towards specific exhibits, buildings, reenactments, etc. will be made.

The observer will conduct data collection through brief informal conversations after the family visits an exhibit, but not necessarily during transitions between exhibits to not pre-empt any spontaneity. Audio recordings (with permission) will be the primary data collection tool with the use of a collection guide to focus the observer on elements of (1) nostalgia, (2) reenactment of past experiences, (3) any emotional reactions (positive or negative) to experiences, (4) what stands out to the family's children.

Key ethical considerations include opt-in consent for the family and no data collection from minors without explicit parental approval.
Families identified as suitable candidates should be offered half-price admission or vouchers for use on CW as compensation for their time.

Outcome: Qualitative insights into how nostalgia and memory influence consumer behavior in tourism. Tangentially, identify experiences that resonate with younger audiences or where the CW experience was lacking. Finally, lay groundwork for additional descriptive research by identifying motivations and behaviors that can be measured on a scale.

Initiative 2: *Customer Discovery Interviews in Colonial Williamsburg*

Objective: To connect and learn from the adults in the families that recently took the CW tour, in an engaging small-talk conversation, within a relaxing environment.

Target Population: Adults of the families who visited CW that day (still wearing their CW pass lanyards), relaxing within the general Merchant Square area.

Methodology: Casually interact with said adults in a fun and relaxing environment, like breweries, restaurants, the markets within the Merchant Square.

Example: Unintentionally, members of our team discovered that during Spring Break weeks, many families on the CW tour would break for lunch or wrap up their day at Precarious Brewery

— a lively spot with open space, arcade games, food, adult beverages, and entertainment. While the adults relaxed over food and drinks, the kids were playing in the arcade.

Seizing the opportunity, one of our team members would strike up casual conversations with the adults — whether while waiting in line for food, washing hands in the restroom, or ordering a drink. Through these friendly interactions, they gained valuable insights into the families' experiences and overall impressions of CW. Often, the conversations went deeper, with visitors offering thoughtful suggestions on how their experience could have been even better. Without formal effort, our team was able to gather authentic, off-the-cuff feedback directly from recent CW guests.

Methodology continued: Hire/ Recruit engaging and noninvasive individuals, to engage in small talk with target market. By having the recruits ask the right questions in the right setting, these casual conversations can provide valuable qualitative input for better insights in regard to the wants and needs of your target market.

Outcome: By doing this, you gain valuable, authentic, and candid insights from families. Instead of feeling pressured to complete a survey or respond to a scripted questionnaire from a CW representative, they engage naturally in conversation about their experience at CW. This approach gives a voice to the majority of your target audience — those who typically don't take the time to leave a Google review after every visit. Overall, it provides qualitative insights into a previously quiet segment of your market, offering a richer understanding of their perspectives and needs.

Initiative 3: *Online Sentiment Analysis*

Objective: Discover unsolicited consumer narratives about returning to childhood destinations with the goal of finding emotional drivers, behaviors, and language patterns associated with nostalgia tourism.

Target Population: Tourists who self-profess visiting a destination based on childhood experiences (nostalgia). While special attention should be paid to data found regarding visits to CW, the target population should look at a wide range of experiences to better capture insights into what causes people to return to childhood vacation spots.

Methodology: Scrape and analyze user generated platforms including but not limited to Reddit, Facebook, TripAdvisor, Instagram, etc. Web scraping tools should focus on keywords including, "returning", "childhood memory/trip", "family tradition", "nostalgic". This data then should be organized into recurring themes with themes further subdivided into positive or negative associations.

Outcome: This research will produce a thematic map of when and why people return to childhood destinations. Key insights should include how emotions play into tourist decision

making as well as the language tourists use to describe those visits. These insights should be used as a foundation for follow-on descriptive research.

Descriptive Marketing Research Initiatives

Initiative 4: *Who is Colonial Williamsburg's current and prospective visitors?*

<u>Target Population</u>: Current and past visitors

<u>Methodology</u>: Cross-Functional On-line survey from people purchasing tickets.
- Survey Design:
    - o Length: 10-15 questions (5-10 minutes)
    - o Distribution vehicle: Mailchimp
    - o Examples of potential questions:
        - Multiple-Choice Question:
            - Age: 18-25; 25-30; 30-35
        - Example of close-ended Question:
            - How many times have you visited Colonial Williamsburg? _____ (numerical value)

<u>Content/notes</u>: Cross Functional On-line Survey would be primary and qualitive data.
- The purpose would be to gather direct feedback from users on their demographics and why they chose to visit Colonial Williamsburg.
- Topics in the survey would be demographics; where do you live, how did you get here, where are you staying, what interests you the most in coming here, and where else would you have gone.
- Sampling would be from anyone who purchases tickets on site at Colonial Williamsburg or on-line during the month of Jine. We Would sample for two weeks.
    - o This would be beneficial to break down "who" and the "what" is visiting Colonial Williamsburg.

<u>Compensation</u>: Half-off ticket pricing

Initiative 5: *Analyze First-time Visitors, Return Visitors, and where they are visiting at Colonial Williamsburg*

<u>Target Population</u>: First-time and returning visitors to Colonial Williamsburg

<u>Methodology</u>: Technology-Mediated Observation and a follow-up online Survey.

- Technology-Mediated Observation: Use cellphone towers to gather primary and qualitative data on visitors. Information to extract would be who is visiting, if they have visited before (using past data), and what they are viewing/mapping individual foot traffic. From the latter information, with the help of digital cameras, create a heatmap of the site and analyze where the largest volume of visitors go. This method is noninvasive and would allow for one or two individuals to comb through the data and see what it is saying.
- On-line Survey: Send a follow-up survey using Multiple Choice Questions and Likert Scale. Example of potential Likert Scale questions:
  - Prompt: Rank how important each of the following is to you during your visit
    - Access to a variety of unique experiences
      - (1) Least Important to (5) Most Important
    - Viewing exhibits
      - (1) Least Important to (5) Most Important
    - Interactions with interpreters
      - (1) Least Important to (5) Most Important

Sampling notes: Sampling would be everyone who visits for both observation and survey. The study would continue for at least a year and a half to capture return visitors. This would be beneficial to observe who is visiting and asking follow-on questions about their experience and what they value about it.

Compensation: Coupon for 20% off merchandise during respondent's next visit

Initiative 6: *How does returning to Colonial Williamsburg as an adult help to reconnect them to their past while creating new memories upon returning?*

Target Population: Return visitors that visited as a child (between 5 and 15).

Methodology: Mail Panel Survey and Secondary Data Analysis
- Survey
  - Mail Panel Survey would be Primary and Qualitative data.
  - Survey sent to a group chosen in advance that could provide feedback on their experience.
  - Questions would revolve around respondents' feelings when they visited as a child and now, and what has changed
  - The topics for the Mail Panel Survey would be about their feelings and what has changed.
  - Survey Design:
    - Questions would be Multiple-Choice, Close-ended, and Open-ended.

- Example of Open-end question:
    - Describe how you were feeling when you re-visited after being there as a child?
- Secondary Data Analysis:
    - A secondary data analysis would be Secondary and Qualitative data.
    - Reviewing all the data from websites such as Reddit, Quora, and other Social Media sites about visiting Colonial Williamsburg since their childhood.

Sampling notes: Sampling would be from those who had visited as children and have agreed to be a part of the Mail Panel Survey. This would be beneficial to break down the "when" and "how" is visiting Colonial Williamsburg.

Compensation: For the participants, in the Mail- In Survey, they are going to receive $50 for their time.

Predictive Marketing Research Initiative

Initiative 7: *Forecasting Future Visitation Among Young Adults Based on Childhood Exposure to Colonial Williamsburg*

Objective:

      To predict which young adults, especially those who visited Colonial Williamsburg (CW) during childhood are most likely to return with their own families. This initiative models future family visitation likelihood by analyzing childhood exposure, current cultural behaviors, and preferred content formats.

      The goal is to generate a predictive profile that helps CW identify and engage high-potential return visitors using existing survey and focus group data.

Target Population:
- • Primary: Adults aged 18–35 who may have visited CW as children
- • Secondary: Adults aged 36–50 currently parenting or planning family travel
- • Target Criteria:
    - • Mix of former CW visitors and culturally engaged non-visitors
    - • Interest in returning with family, especially children

Methodology:
- *Step 1: Define the Dependent Variable*
    - Future visitation intent with family (measured via survey Likert-scale scores)
- *Step 2: Identify Key Independent Variables*
    - Drawn from primary/quantitative and qualitative data:
        - • Childhood visit history (yes/no)

          • Interest in visiting with family or children (check-all responses)
          • Preferred engagement formats (AR, gamified learning, short-form videos)
          • Content consumption habits (e.g., books, TikTok, museums, podcasts)
          • Demographics (age, education, region)

- *Step 3: Statistical Techniques*
    - Descriptive Analysis: Compare average revisit likelihood between past visitors and non-visitors
    - Cross-Tabulations (Chi-Square): Test association between childhood visit and future family intent
    - T-tests/ANOVA: Analyze digital content format preferences by age and visit history
    - Regression Modeling: Predict likelihood of family revisit using all listed independent variables
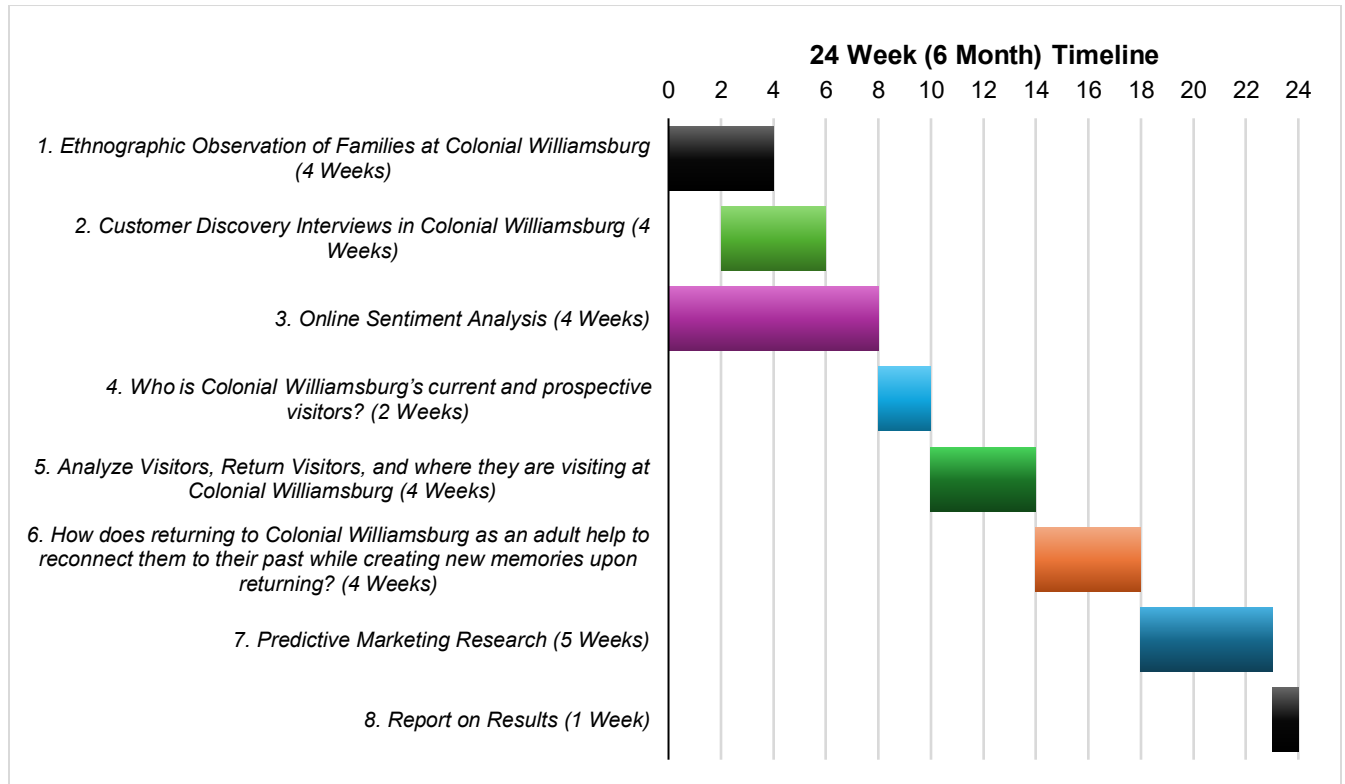
Research Initiative Proofing:

To test the methodology laid out in initiative 7, Team 2 conducted a survey to check the methodology and verify the feasibility of our proposed line of research. The highlights of that survey are shown below along with secondary data and qualitative insights.

- Primary/Quantitative Data Insights (Survey, n = 43):
    - ~70% of childhood visitors rated future visit likelihood 4 or 5 out of 5 (Soni, 2025)
    - These same respondents frequently selected "Family" or "Children" as future companions (Soni, 2025)
    - Top-rated engagement features included gamified learning, short-form content, and mobile accessibility (Soni, 2025)
- Secondary Data Highlights:
    - Only 28% of U.S. adults now visit historical sites—down from 37% in 1982 (OpenAI, 2025)
    - Gen Z and Millennials use TikTok, YouTube, and Instagram for trip planning (81%+) (OpenAI, 2025)
    - "Bringing my kids to places I loved as a child" is a strong travel motivator in museum studies (OpenAI, 2025)
    - 66% of adults under 30 listen to history podcasts; 57% prefer short-form video to learn (OpenAI, 2025)
- Qualitative Evidence (Focus Groups):
    - Participants described CW as a "core childhood memory" they'd want to recreate for their children (Team 2, 2025)
    - Repeated themes: "Make it more digital," "Needs to be interactive," "Would return if updated" (Team 2, 2025)

- o Parents emphasized the value of CW as a learning experience; if formats felt modern (Team 2, 2025)

- Expected Deliverables
    - o A predictive model identifying "high likelihood" returners
    - o Visitor segments such as:
        - Legacy Loopers: Childhood visitors now planning family returns
        - First-Time Family Explorers: Digitally engaged non-visitors interested in family visits
        - Disengaged Digitals: Low interest in both history and return likelihood
    - o A prioritization matrix of features most predictive of return (e.g., gamified learning > AR > static exhibits)
    - o Strategy blueprint for CW's marketing and programming to re-engage former child visitors using mobile-first, family-centric content
- Strategic Value to CW: This predictive initiative will enable CW to:
    - o Anticipate and target the next generation of return visitors
    - o Maximize ROI on digital family-friendly upgrades
    - o Focus retention efforts on high-conversion segments
    - o Build a scalable model for future visitor lifecycle marketing

Timetable

24 Week (6 Month) Timeline

0 2 4 6 8 10 12 14 16 18 20 22 24

1. Ethnographic Observation of Families at Colonial Williamsburg (4 Weeks)

2. Customer Discovery Interviews in Colonial Williamsburg (4 Weeks)

3. Online Sentiment Analysis (4 Weeks)

4. Who is Colonial Williamsburg's current and prospective visitors? (2 Weeks)

5. Analyze Visitors, Return Visitors, and where they are visiting at Colonial Williamsburg (4 Weeks)

6. How does returning to Colonial Williamsburg as an adult help to reconnect them to their past while creating new memories upon returning? (4 Weeks)

7. Predictive Marketing Research (5 Weeks)

8. Report on Results (1 Week)

Our timetable allocates a total of 24 weeks (roughly 6 months) to accomplish the above research proposal. The exploratory research initiatives are laid on top of each other in an 8-week period. None of the three initiatives are exclusive to the other but must all be completed prior to beginning descriptive marketing research to inform and refine the descriptive initiatives. The three descriptive initiatives build on each other and are therefore staggered sequentially over a 10-week period. Finally, the predictive marketing research initiative would begin only once the descriptive initiatives are all finalized to produce as accurate a model as possible to inform the final report over the next 5 weeks with one final week allocated to reporting on the results of the research.

References

Ferree, J. (2024, November 11). *Colonial Williamsburg Foundation, Form 990*. Nonprofit Explorer.https://projects.propublica.org/nonprofits/organizations/540505888/2024431793 49307659/full

Hair Jr, Joseph, Ortinau, David, Harrison, Dana (2024) *6th Edition Essentials of Marketing Research.* McGraw Hill.

OpenAI. (2025, May 9). Response to prompt on Gen Z and Millennial engagement with cultural and historic attractions in the U.S., including digital behavior trends and content strategy implications [Large language model]. ChatGPT. https://chat.openai.com/chat

Our Organization - Colonial Williamsburg. Colonial Williamsburg. (n.d.). http://www.colonialwilliamsburg.org/about/our-organization/

Soni, S. (2025). *Colonial Williamsburg return visitor survey (n = 43)* [Unpublished raw data]. William & Mary, Raymond A. Mason School of Business.

Team 2. (2025). Colonial Williamsburg Focus Group Feedback [Unpublished manuscript]. William & Mary, Raymond A. Mason School of Business.