

DRAFT

H2R Market Research

Reveal Your Customer's Full Experience

PGAV Destinations ***The Alamo Brand Perception Research***

Delivered June 2018

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Methodology

TARGET AUDIENCE

The Alamo Brand Perception Research was conducted among a professionally managed panel of attractions visitors living in Texas (with 37% being Hispanic), Washington, D.C., San Francisco, San Jose, Los Angeles, San Diego, Denver and Phoenix. Respondents (*called prospects throughout the report*) were screened to ensure they were leisure travelers, household decision makers regarding travel and attractions visitors. Additionally, an oversample in the city of San Antonio was gathered, with 63% of this oversample being Hispanic.

SAMPLE

A total of 2,068 travelers were interviewed for this study, providing a maximum margin of error of +/-2.2% at a 95% confidence interval.

This presentation includes breakouts among Texas Prospects (1,600N with a maximum margin of error of +/-2.5% at a 95% confidence interval), San Antonio Prospects (236N with a maximum margin of error of +/-6.4% at a 95% confidence interval) and Feeder Markets* (400N with a maximum margin of error of +/-4.9% at a 95% confidence interval).

*Feeder Market Prospects include prospects of Washington, D.C., San Francisco, San Jose, Los Angeles, San Diego, Denver and Phoenix.



Brand Penetration

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- Consideration & Visitation
- Market Potential



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- Intent to Visit
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Barriers to Visitation

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- Stated vs. Derived Barriers
- Motivations for Future Visits

Executive Summary

Project Overview

The purpose of conducting the Brand Perception Research for The Alamo was to provide decision makers with a benchmark that measures how attractions visitors across the region view The Alamo's brand as a travel destination.

This research also explores how The Alamo compares to other San Antonio attractions in its competitive set and H2R's Proprietary Industry Norms (H2R Norms), which for this study are comprised of attraction brand scores tested since 2014.



The Alamo is Top-of-Mind Among Travelers

- The Alamo is a well-known authentic American attraction with very strong top-of-mind brand awareness. More than one-third (35%) of target travelers in this study identified it as a historical/cultural attraction in the state of Texas that first comes to mind—dominating all other landmarks across the state. Hispanic prospects reported a slightly higher percentage at 36%.
- Likewise, The Alamo's aided brand awareness is nearly universal at 98% and, as expected, is highest among San Antonio prospects (100%) followed closely by Hispanic prospects (99%), Texas prospects (99%) and Feeder Markets outside of Texas (95%).
- Market potential (those who have visited or considered visiting The Alamo) is also strong overall at 93%, exceeding the competitive set average (+25 points) and the H2R Norm (+22 points) significantly*. This ratio is 96% among both Hispanic prospects and Texas prospects, ranking second behind only the San Antonio River Walk for both groups. The Alamo also has a high market share among Hispanic prospects, with 86% having visited before—the same as Texas prospects.

*Throughout this presentation, the term "significant" indicates a statistically significant difference.



Brand Health Stronger Among Hispanics

- The Alamo earns stronger brand health scores among Hispanics than other ethnicities – and this is true in San Antonio, across Texas and in the Feeder Markets. Hispanic consumers exhibit higher aided awareness of The Alamo and are more likely to have visited the landmark recently.
- Likewise, Hispanic consumers' across the target market view The Alamo somewhat more favorably than either Caucasians or other ethnicities, although not by statistically significant levels. And, Hispanics living in San Antonio and in Texas are significantly more likely to have seen advertising (41% and 32%, respectively) for The Alamo than Caucasians living in San Antonio (34%) and Texas (25%).
- Perhaps most importantly, Hispanic travelers exhibit a much higher intent to visit. Hispanic consumers across Texas (+18 points), in San Antonio (+12 points) and in the Feeder Markets (+41 points) are all significantly more likely to visit The Alamo than their Caucasian counterparts. Unaided comments deliver similar sentiments.



Favorable Opinion, But Average Intent

- Overall, prospects have an overwhelmingly favorable view of The Alamo. Nearly nine out of ten (85%) have a positive opinion of The Alamo, with the historic attraction ranking second behind San Antonio River Walk (90%). This metric significantly exceeds the competitive set average (+14 points) and the H2R Norm (+17 points). As might be expected, Texas (87%) and San Antonio (88%) prospects have a more favorable opinion of The Alamo than Feeder Market prospects (78%), but Hispanic prospects outrank all four segments (89% favorable opinion).
- Intent to visit The Alamo is highest among San Antonio prospects (61%), followed by Hispanic prospects (59%), Texas prospects (49%) and Feeder Market prospects (29%). But overall, intent to visit The Alamo is comparable to the San Antonio Competitive Set and the H2R Norm. Nearly five in ten (46%) said they would be likely to visit in the next 12 months, significantly lower than intent for the San Antonio River Walk (62%).
- The Alamo also receives excellent scores on review sites such as TripAdvisor. Coming in second for number of reviews (15,718) among the competitive set, The Alamo earns a satisfaction score of 4.43 – 0.06 points higher than the competitive set average.

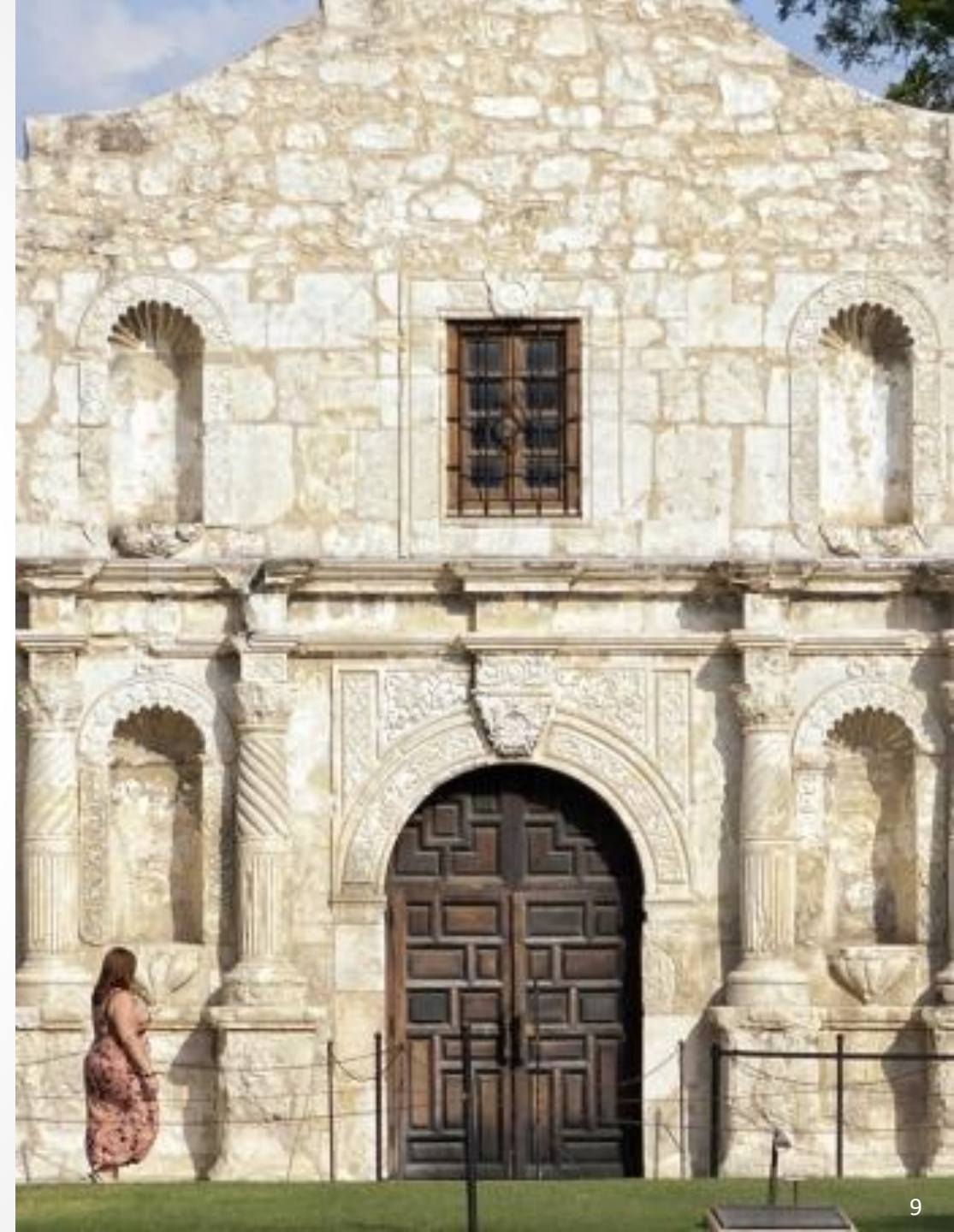


One-Fifth Do Not Enter The Alamo

- Eight in ten Alamo Visitors across these target markets indicate they entered The Alamo on their last visit, while 20% say they visited but never actually entered. This ratio is similar across all three geographic segments. The Alamo is not considered a highly repeatable guest experience. Overall, 24% of Visitors indicate they have just visited The Alamo once. As expected, San Antonio visitors are most likely to have visited more than once (90%), followed by Hispanic prospects (83%), Texas prospects (79%) and distantly Feeder Markets (47%).
- Nearly half of Visitors (47%) indicated they visited The Alamo with children under age 18 in their party. This is a similar ratio compared to Historic Landmarks/Places overall last year at 45%¹ and higher than overarching U.S. travelers at 36%². Hispanic Visitors (60%) San Antonio Visitors (53%) and Texas Visitors (48%) are significantly more likely to have visited The Alamo with children compared to Feeder Market Visitors (34%).
- Demographics across Visitors and Non-Visitors are remarkably similar to Non-Visitors.

¹ PGAV Destinations & H2R Market Research (April 2018), *Voice of the Visitor 2018*

² OmniTrak (May 2018), *TravelTrakAmerica*



Emotional Drivers for Hispanics Vary

- Among Hispanic Visitors to The Alamo, those ages 55 and older were significantly more likely to visit and enter The Alamo (87%) compared to their younger counterparts (75%). However, younger Hispanics were significantly more likely to visit this year (+15 points). And, as one might expect, older Hispanics were far less likely to have children in their Visitor party (45%) compared to Hispanics under 55 (64%).
- While activity participation was similar among both Hispanic age groups, the emotional drivers for their visit had some variations. The top emotional drivers for both age groups were the desire to learn about history and desire to provide my family with a memorable experience. But for younger Hispanics, the desire to learn/experience something new (+18 points), reconnect and spend time with friends/loved ones (+18 points) and experience a new event (+18 points) were significantly more important in motivating their visit.



Brand Strengths & Unmet Needs

- A “Brand Map” map analysis reveals The Alamo has many strengths in the eyes of Visitors. These include self-guided tours, on-site historic museums/structures and being a place where all ages can learn and have fun. While most of these strengths were found across the different segments, Texas, San Antonio and Hispanic prospects were more likely to see The Alamo as a multi-generation destination with something that appeals to everyone.
- While The Alamo has numerous strengths, a few unmet needs exist as well. Visitors (overall, by geographic segment and among Hispanics) feel The Alamo lacks fresh new events, attractions and activities and it would also benefit from having a greater variety of things to see and do on-site. Visitors also believe there is a lack of shade from the heat and would like the opportunity to buy a ticket online and choose a specific tour time. This means that these attributes’ importance outweighed Visitors’ satisfaction with them as they relate to The Alamo.



Reverent Space & Shade Top Concept Elements

- Among the eight elements that were tested, consumers agree most that The Alamo could most benefit from having more reverent space (73%) and more shade trees on the site (73%). These were the top two elements among Texans, Hispanics, San Antonio prospects and Feeder Market prospects. Reclaiming and delineating the footprint (69%) ranked third overall. Texas, Hispanic and San Antonio prospects were significantly more interested in the state-of-the-art museum than were Feeder Market prospects.
- Among Hispanics, older prospects ages 55+ were significantly more likely to agree with removing commercial activities like Ripley's and Tomb Raider from the historic core (+13 points) compared to younger Hispanics. Younger Hispanics, however, were significantly more likely to agree with giving The Alamo entrance a real wow factor (+13 points). It is important to note, however, that these two elements ranked 7th and 8th overall and by age group. And, the same trends were seen overall.



Barriers to Visitation Led by Product Issues

- While most of The Alamo's brand health metrics are excellent, retention runs around average at 46%, indicating The Alamo has a higher ratio of Lapsed Visitors relative to its total market share. Guests have visited, but they need a reason to return.
- Visitors are not the only segment that feel The Alamo is in need of some variety or new experiences. Among Non-Visitors and Lapsed Visitors, the top issues that align most closely with low consumer intent to visit include *never comes to mind*, *not for me/not interested* and *no must sees compelling me to visit*. These derived barriers rank among the top five issues overall, and among Texas prospects and Feeder Market prospects.
- Other derived barriers among Texas Non-Visitors/Lapsed Visitors include *having other places to visit in San Antonio* and a *lack of variety to keep everyone in the travel party entertained*. As expected, *distance and/or proximity* is more of a barrier for Feeder Market Non-Visitors/Lapsed Visitors, as is a *lack of recommendations*. Travelers from out of market need to visit San Antonio before The Alamo can efficiently convert them into Visitors.



Thoughts to Consider

The data in this study suggests The Alamo has strong brand health—both overall and among segments. The next step, based upon the preponderance of evidence revealed in this research, is to provide prospects with a compelling reason to visit or return.

Consumers are ripe for new experiences that will entice prospects to visit and get those who have already visited to return to The Alamo—so it is ideal timing to proceed with the Phase 2 Concept Testing.



Thoughts to Consider

- **Leverage emotional drivers.** Those who entered The Alamo said a desire to learn about history, to provide a memorable experience and to learn/experience something new motivated their visit. These were also in the top for Hispanics, along with the desire to have a fun/entertaining experience. These emotional drivers should be kept in mind when creating possible concepts to add to The Alamo and could be highlighted in marketing materials.
- **Address pain points.** Having relief from the sun and heat is very important to The Alamo's prospects (79%), but only half of Visitors (51%) are satisfied with this aspect of their experience at The Alamo. And, prospects overall and across geographic segments rated providing more trees and shade on site in their top 2 elements that were tested. Addressing this need is important.
- **Court Locals.** The Alamo has a strong base of local visitors that have a positive opinion of the attraction and are likely to recommend it. Leveraging this group on social media or with a "bring out-of-town guests" promotion may also help spur locals to bring in more visitors.
- **Actively Leverage Brand Ambassadors.** Recommendations and references from friends and family have equity that paid advertisements do not. Given that seven in ten (73%) Recent Visitors said they would recommend the attraction to friends/family, it would be wise to actively reach out to these brand ambassadors and provide them with information they can share with their friends and social network followers to help organically grow interest in The Alamo.

Brand Penetration

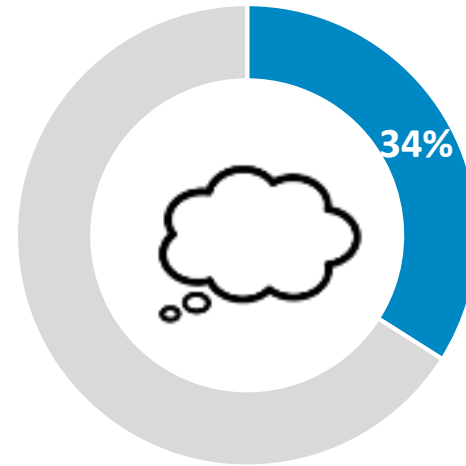
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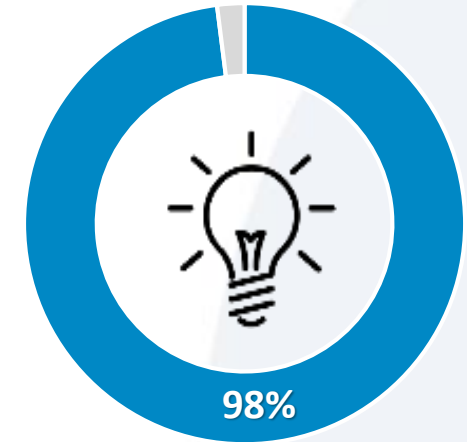
Brand Penetration KPIs*



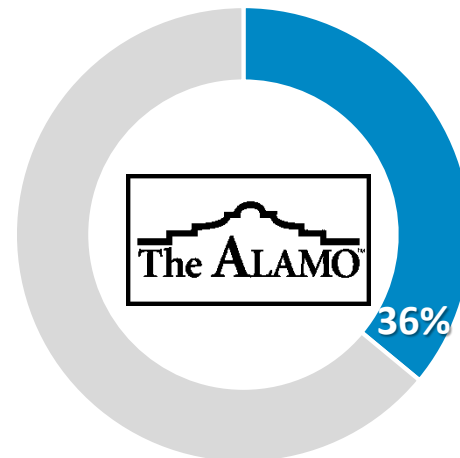
Unaided Brand Awareness



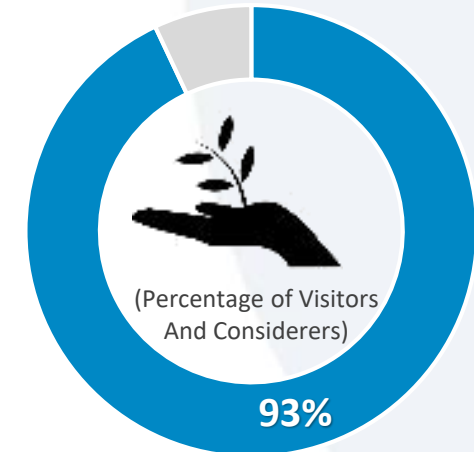
Aided Brand Awareness



Visitation in Past 2 Years



Market Potential

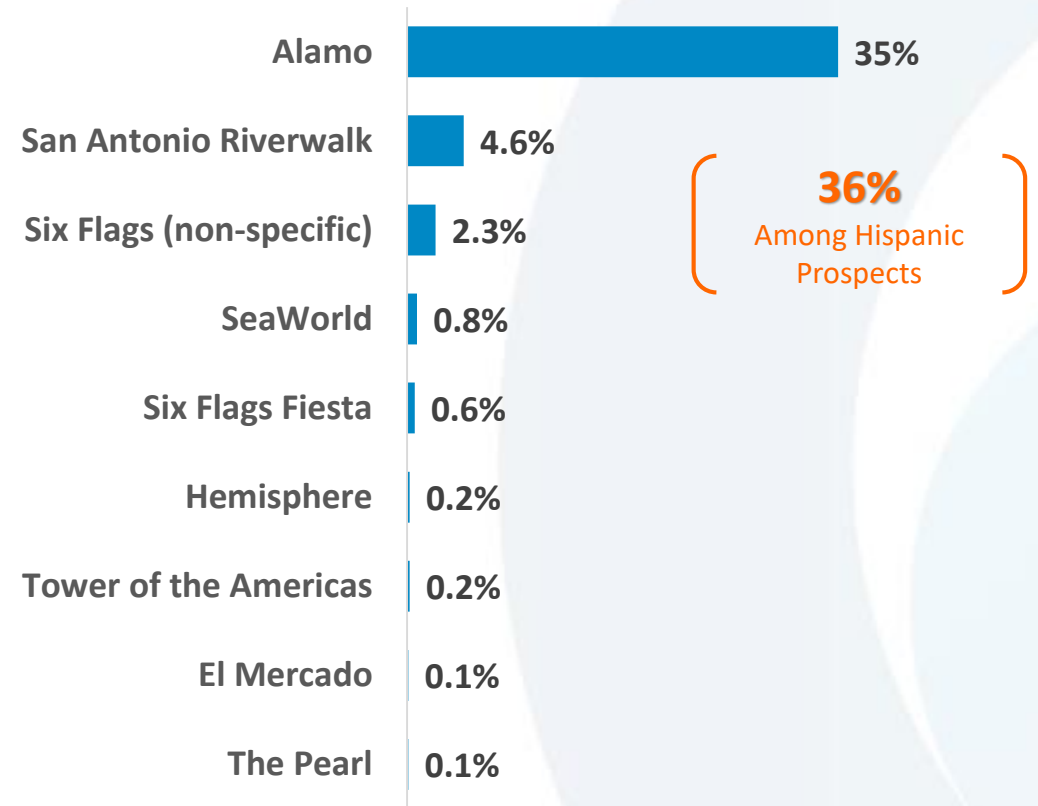


*Key Performance Indicators

The Alamo is a top-of-mind Texas icon, with an unaided awareness level significantly higher than other Texas attractions.



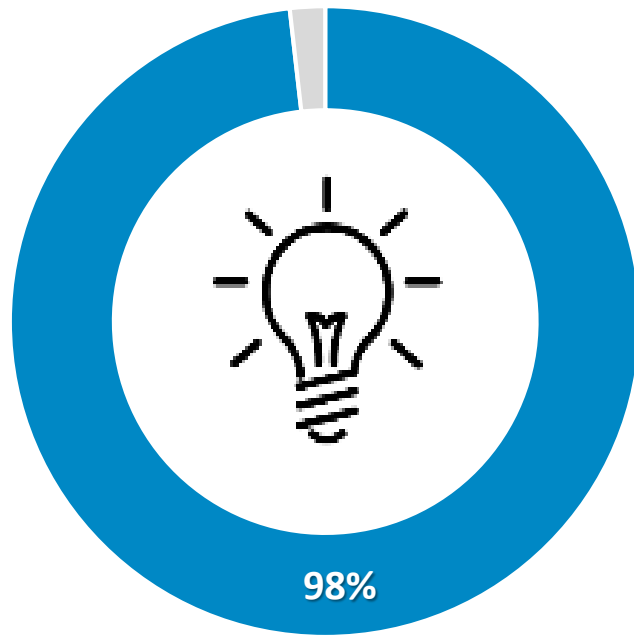
Top of Mind Historical/Cultural Attractions in Texas



Q13: When you think of historical/cultural attractions in the state of Texas, which ones first come to mind?

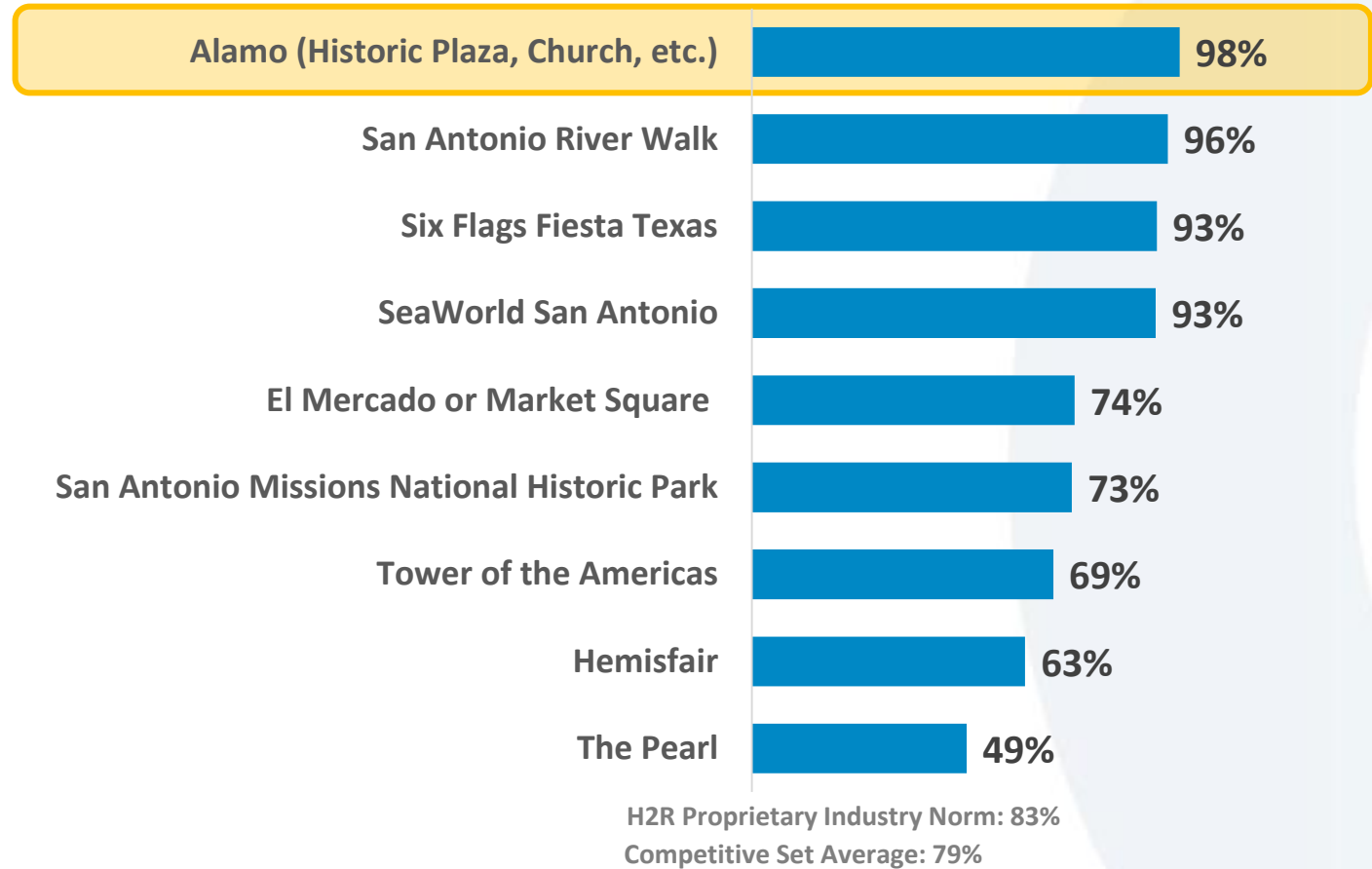
Awareness of The Alamo is near universal at 98%. It ranks first in the competitive set and significantly higher than H2R's Norm for attractions.

The Alamo Aided Brand Awareness



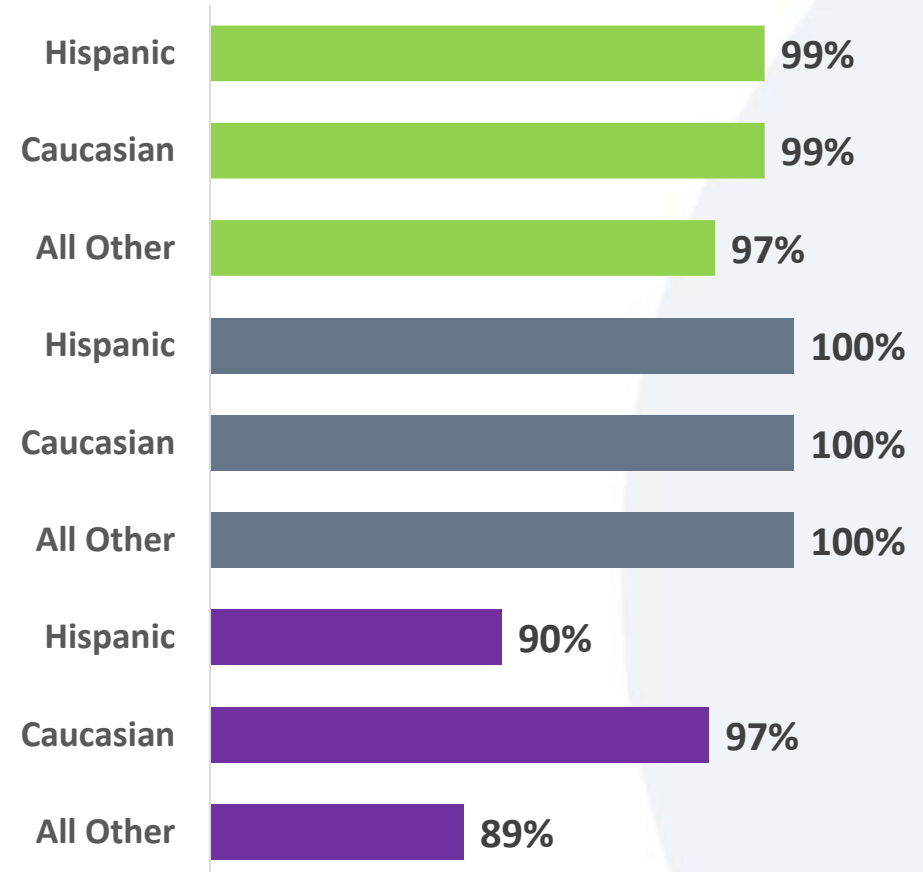
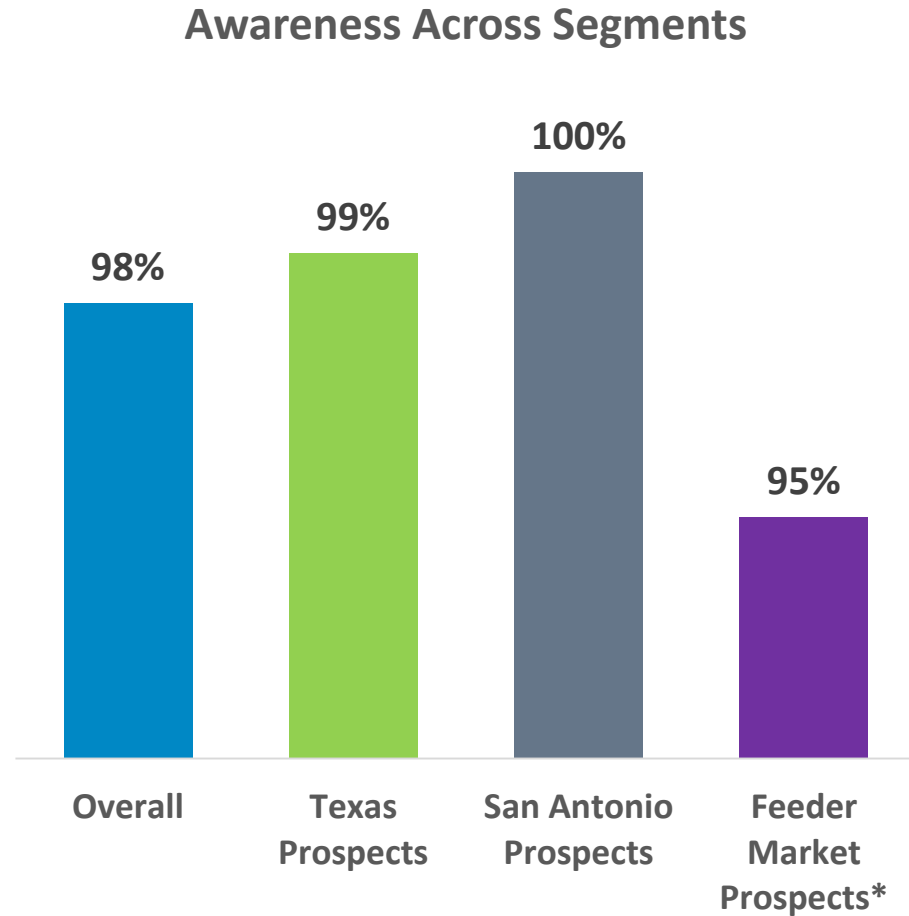
99% Among Hispanic Prospects

Aided Awareness of Competitive Attractions



Q14: Please indicate your awareness and/or prior visitation of the following San Antonio, TX area attractions.

San Antonio and Texas prospects yield the highest awareness levels, reporting comparable percentages among both Caucasians and Hispanics.

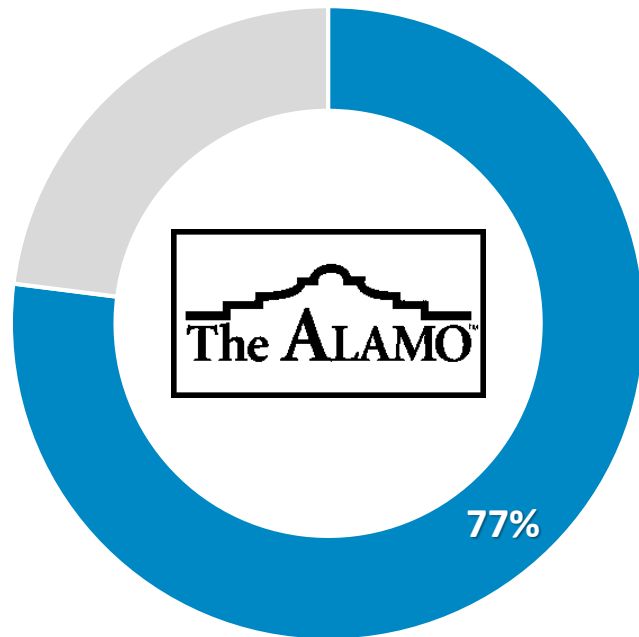


Q14: Please indicate your awareness and/or prior visitation of the following San Antonio, TX area attractions.

*Feeder Market Prospects include prospects of Washington, D.C., San Francisco, San Jose, Los Angeles, San Diego, Denver and Phoenix.

Most San Antonio and Texas prospects have visited The Alamo. Hispanic consumers are as likely to have visited as Caucasians.

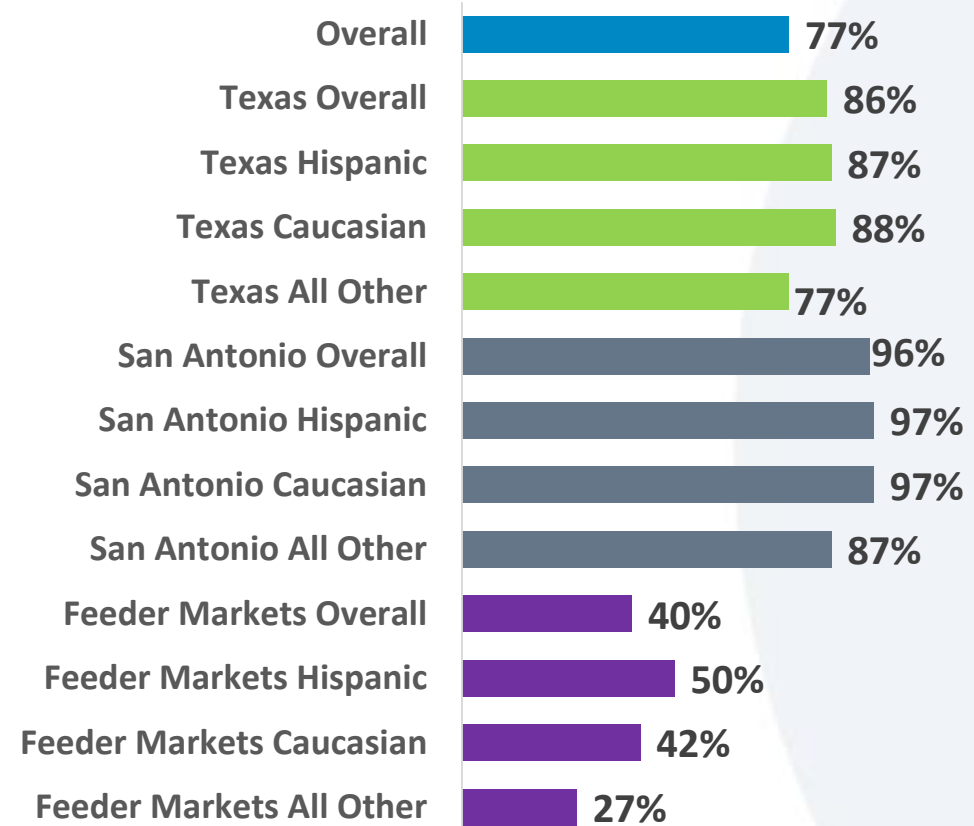
Market Share – % Have Ever Visited The Alamo



Competitive Set Average: 51%

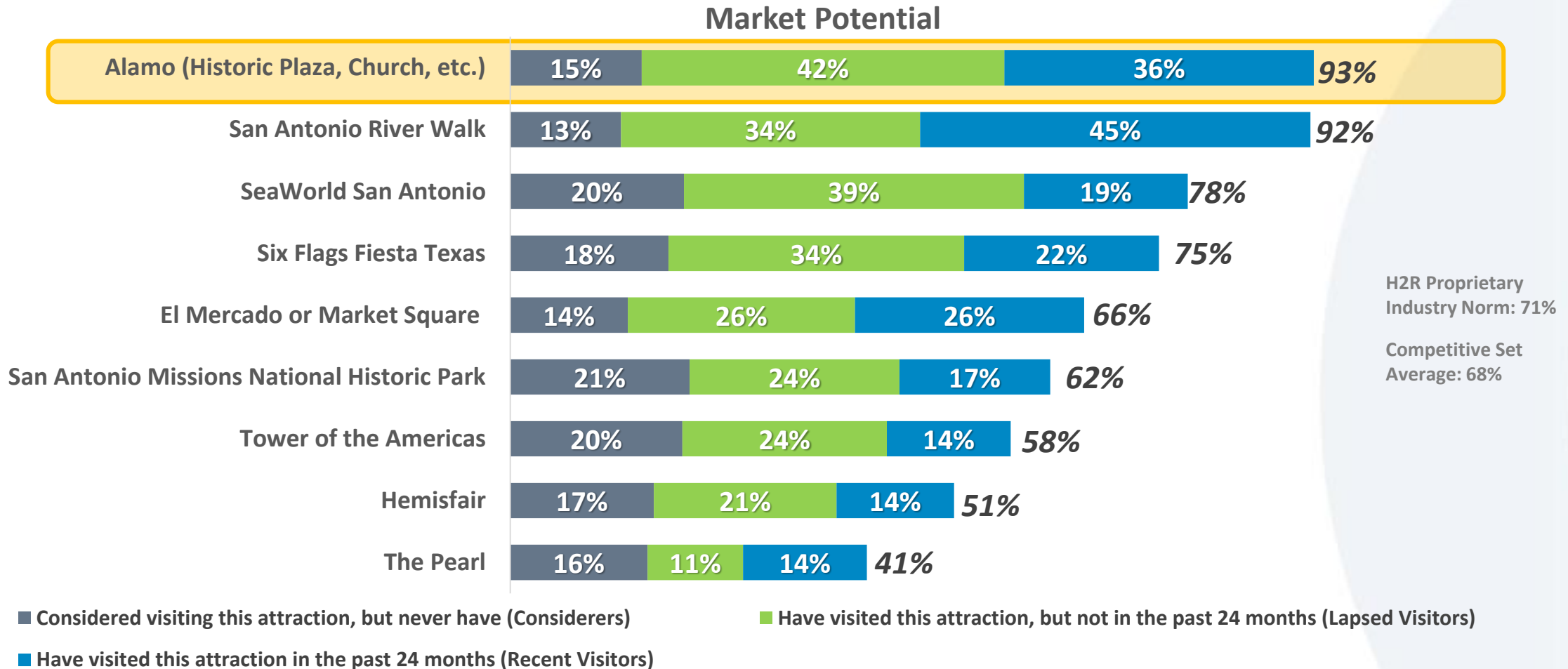
86% Among Hispanic Prospects

Market Share



Q14: Please indicate your awareness and/or prior visitation of the following San Antonio, TX area attractions.

Market potential for The Alamo is large at 93% overall – including Recent Visitors (36%), Lapsed Visitors (42%) and Considerers (15%).



Q14: Please indicate your awareness and/or prior visitation of the following San Antonio, TX area attractions.

As expected, Feeder Markets have a much higher ratio of Considerers, while Texas and San Antonio prospects have far higher levels of visitation.

The Alamo Consideration/Prior Visitation by Segment	Considerers	Lapsed Visitors	Recent Visitors	Market Potential
Overall	15%	42%	36%	93%
Hispanic Prospects Overall	10%	34%	52%	96%
Texas Prospects	10%	46%	40%	96%
Texas Hispanic	10%	35%	52%	96%
Texas Caucasian	10%	55%	34%	97%
Texas All Other	14%	44%	32%	91%
San Antonio Prospects	3%	36%	60%	99%
San Antonio Hispanic	2%	32%	66%	99%
San Antonio Caucasian	3%	36%	61%	100%
San Antonio All Other	9%	61%	26%	96%
Feeder Market Prospects	38%	27%	13%	78%
Feeder Market Hispanic	35%	20%	30%	85%
Feeder Market Caucasian	39%	29%	13%	81%
Feeder Market All Other	35%	21%	6%	62%

Q14: Please indicate your awareness and/or prior visitation of the following San Antonio, TX area attractions.

The Alamo's market potential translates into approximately 13.5 million traveler households across the target markets surveyed.

Market Potential Households*
14.5M Traveler Households in The Alamo's Target Markets

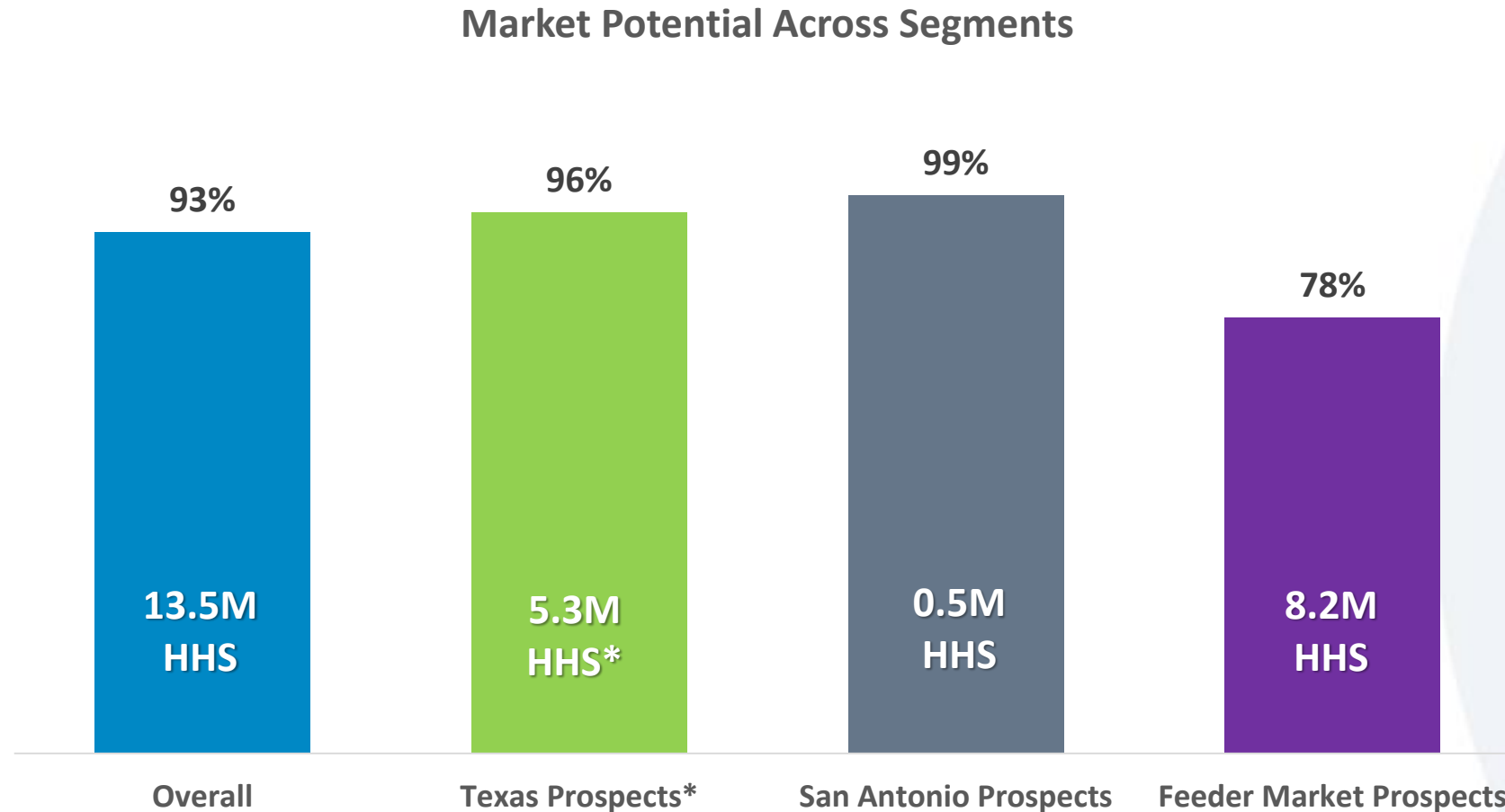


 = 1M Traveler Households

Q14: Please indicate your awareness and/or prior visitation of the following San Antonio, TX area attractions.

*Among traveler households in the markets surveyed in this study.

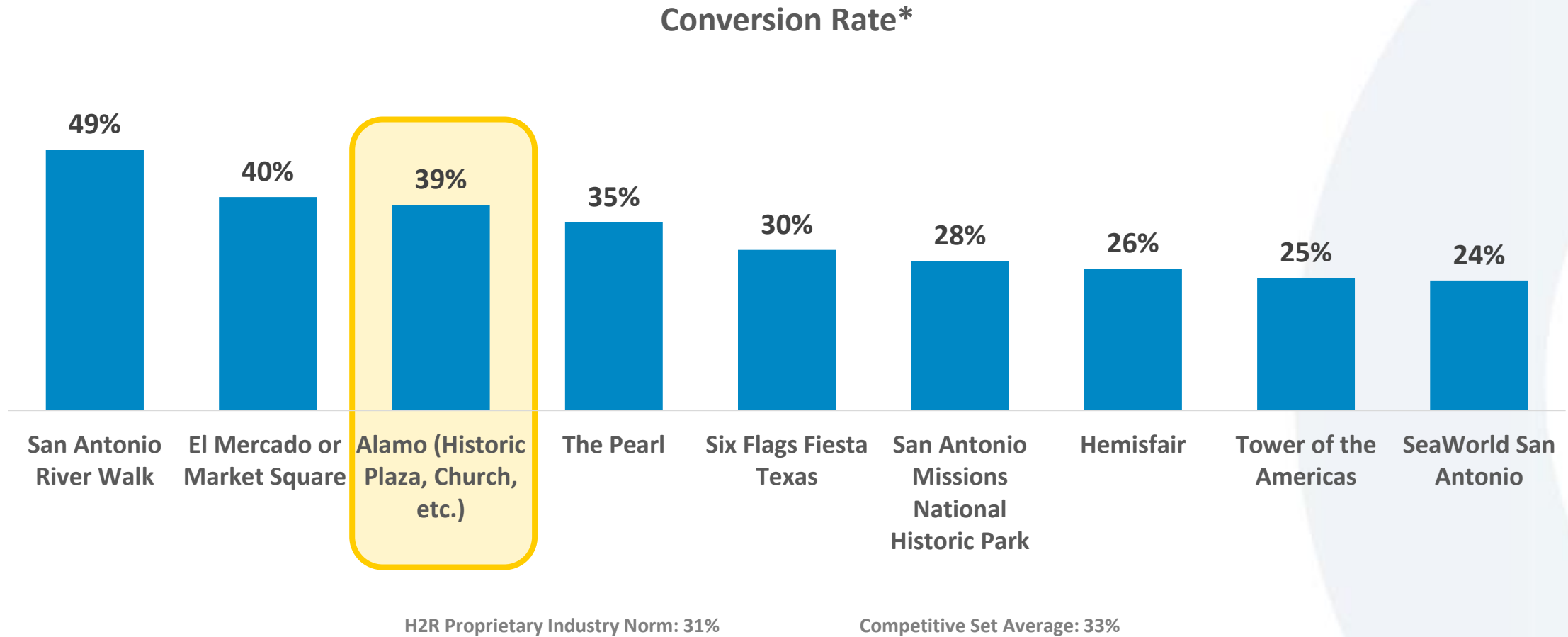
Market potential (in number of households) is highest among the Feeder Markets, with Texan households not far behind.



Q14: Please indicate your awareness and/or prior visitation of the following San Antonio, TX area attractions.

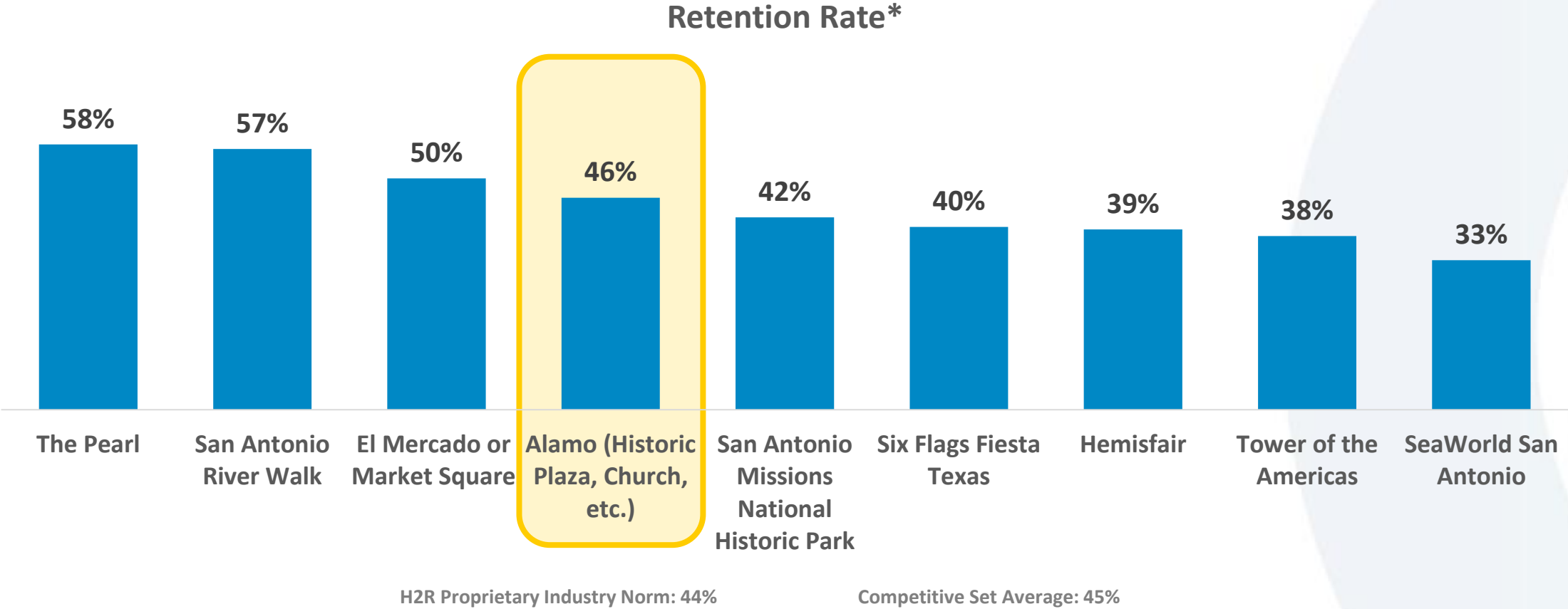
*Also includes San Antonio Prospects.

The Alamo has converted 39% of its market potential in the past two years—significantly more than the competitive set average and H2R’s Norm of 31%.



*Conversion Rate = % Recent Visitors / Market Potential

Retention is good, but is a bigger challenge than conversion. The Alamo's retention rate averages 46% which is on par with H2R's Norm and competitive set attractions.

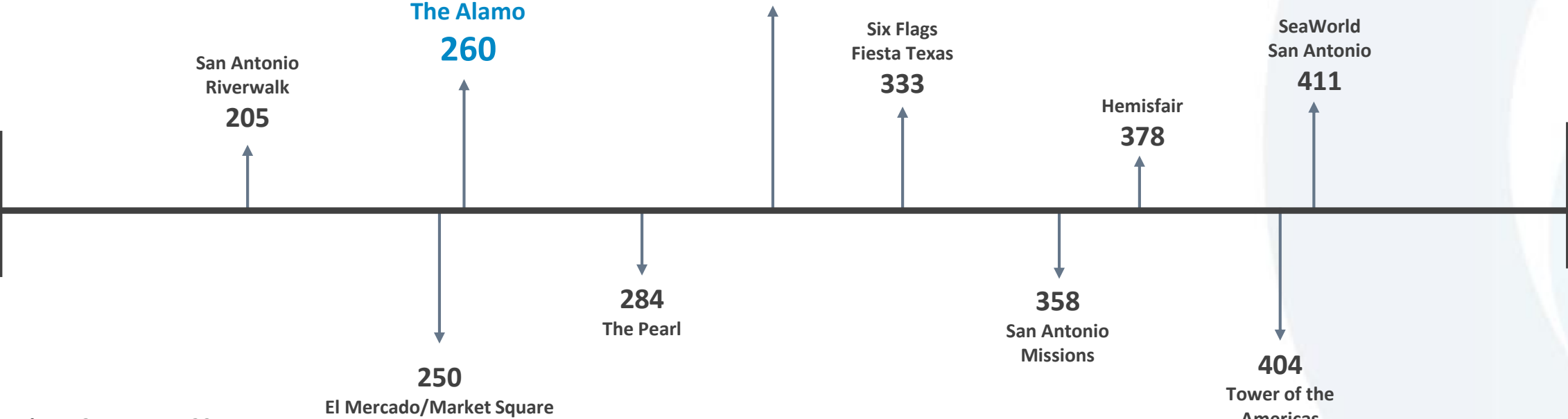


*Retention = % Recent Visitors / % Visitors Ever

The Alamo's lower VGI compared to the competitive set indicates that The Alamo is already converting a significant portion of its market opportunity than the average San Antonio attraction (leaving less upside).

Visitor Growth Indicator (VGI)*

Competitive Set
Average 320 



Min: 142 Max: 1,729

*VGI = Market Potential / Market Share (% Recent Visitors) * 100

The Alamo’s brand penetration metrics are strongest in San Antonio with considerable opportunity existing in the Feeder Markets.

Brand Penetration Summary by Segment	Overall	Texas Prospects	San Antonio Prospects	Feeder Market Prospects	Hispanic Prospects
Unaided Awareness	34%	35%	35%	39%	36%
Aided Awareness	98%	99%	100%	95%	99%
Considered Visiting (but never have)	15%	10%	3%	38%	10%
Market Share	77%	86%	96%	40%	86%
Market Potential	93%	96%	99%	78%	96%
Conversion Rate	39%	42%	61%	17%	88%
Retention	46%	47%	63%	32%	61%
VGI	260	239	164	608	183

Among Texas prospects, The Alamo dominates in aided awareness and falls second only to San Antonio River Walk across most key metrics.

Brand Penetration Metrics Among Texas Prospects	The Alamo Rank	The Alamo	El Mercado or Market Square	Hemisfair	San Antonio Missions National Historic Park	San Antonio River Walk	SeaWorld San Antonio	Six Flags Fiesta Texas	The Pearl	Tower of America
Unaided Awareness	1	35%	0.1%	0.2%	0.0%	3.8%	1.0%	0.6%	0.1%	0.2%
Aided Awareness	T1	99%	80%	69%	78%	99%	97%	97%	53%	75%
Considered Visiting	8	10%	13%	18%	21%	8%	18%	18%	17%	21%
Market Share	2	86%	59%	39%	46%	89%	67%	65%	27%	43%
Market Potential	2	96%	73%	56%	67%	97%	85%	82%	44%	64%
Conversion Rate	2	42%	41%	25%	28%	53%	25%	31%	34%	24%
Retention	4	47%	50%	36%	40%	58%	31%	39%	56%	36%
VGI	8	239	243	403	360	188	409	322	297	421

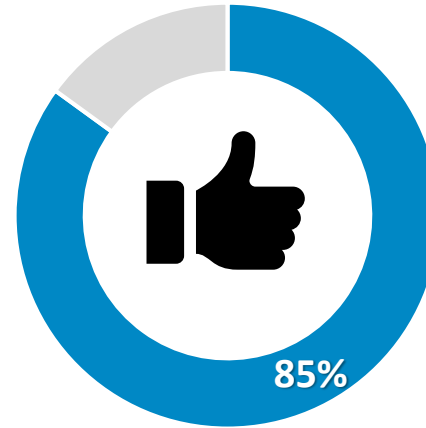
Brand Equity

02

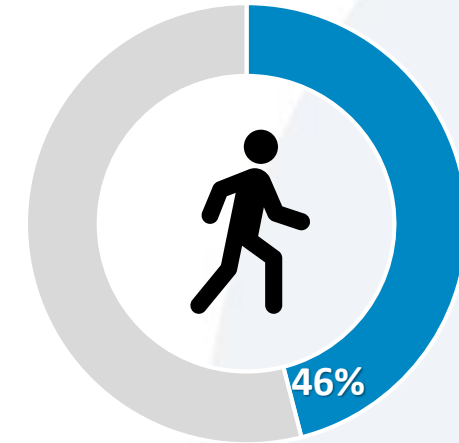
Brand Equity KPIs



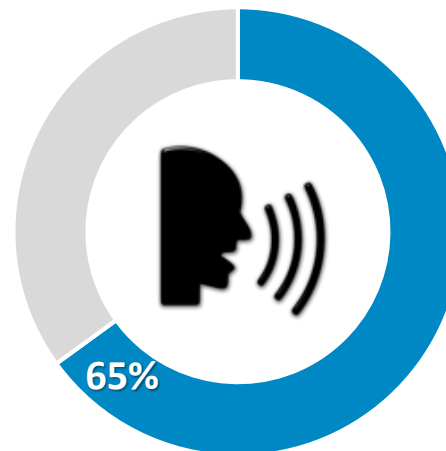
Positive Opinion



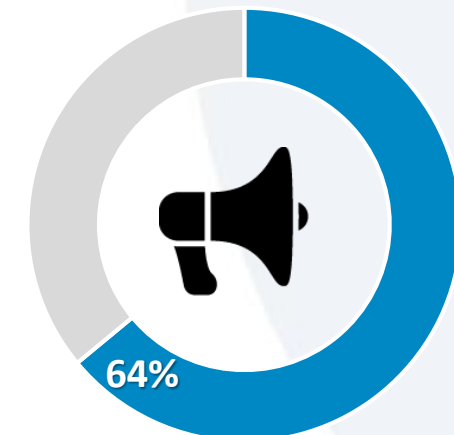
Intent to Visit



Market Buzz

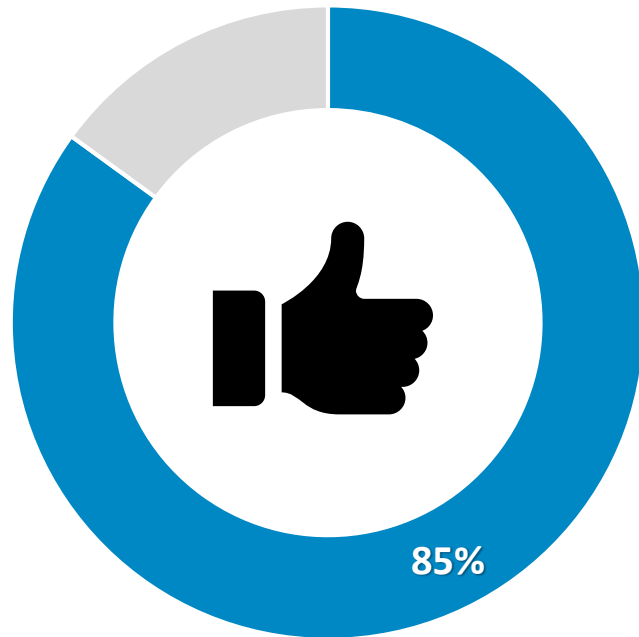


Net Promoter Score



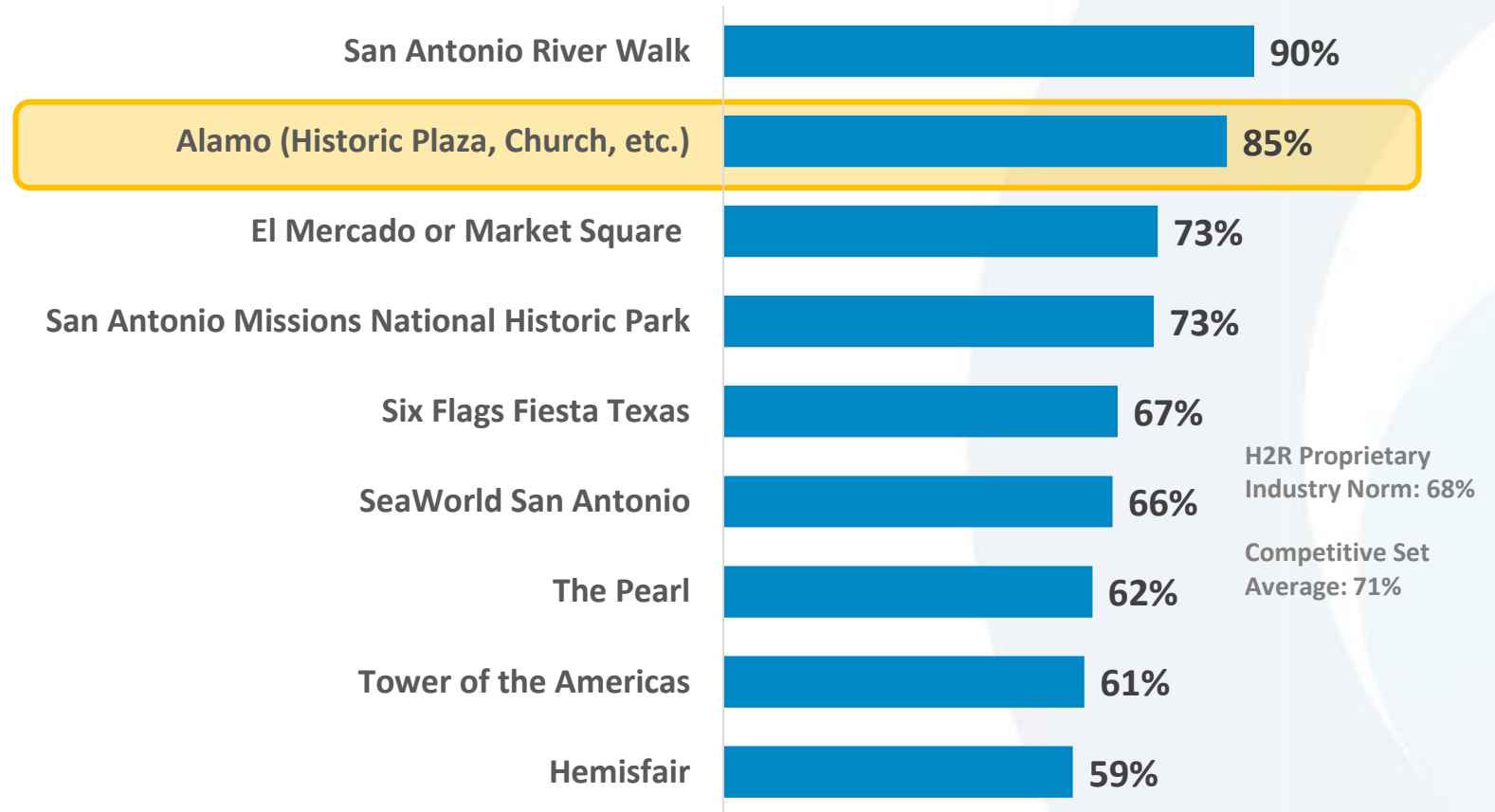
More than eight in ten of those familiar with The Alamo have a favorable opinion of the attraction—second only to the San Antonio River Walk.

Positive Opinion of The Alamo



89% Among Hispanic Prospects

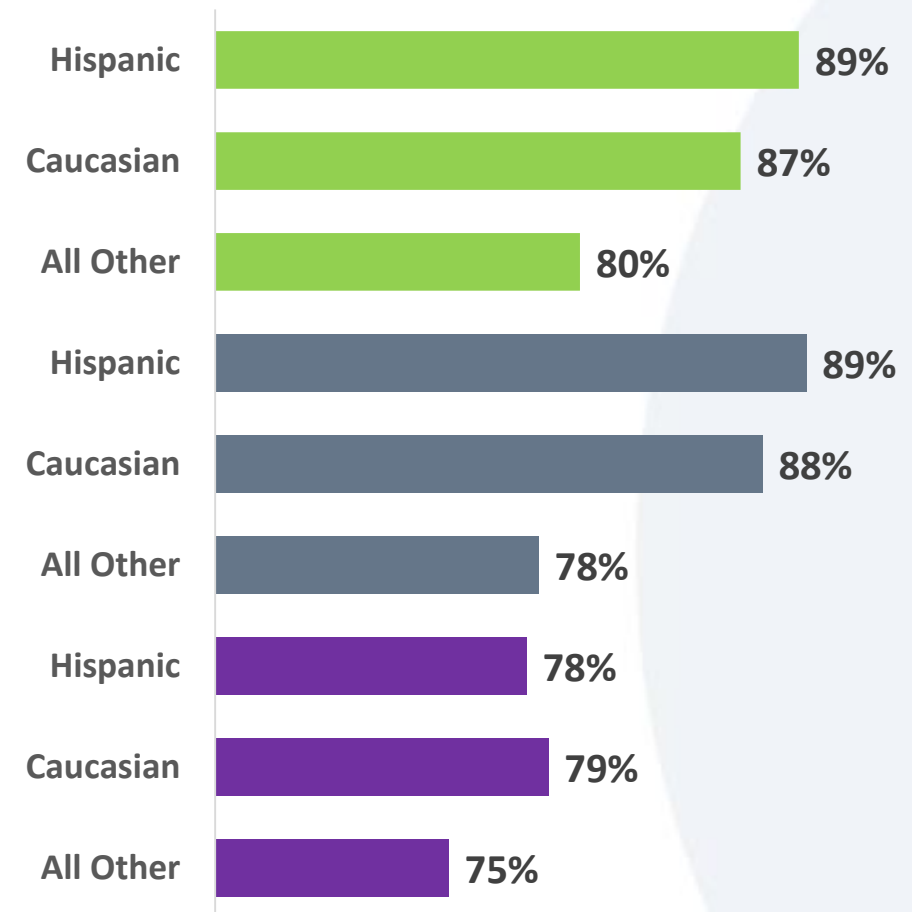
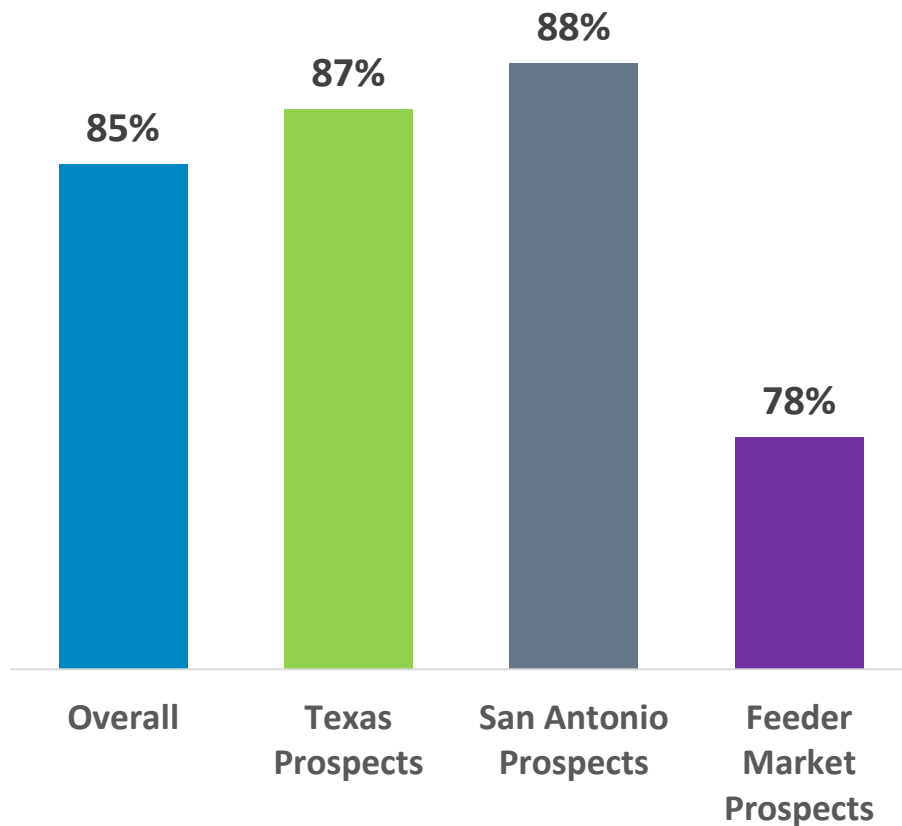
Positive Opinion of Competitive Attractions



Q15: Please indicate to what degree your opinion of these destinations is positive or negative.

Hispanics' opinions of The Alamo are just as high as their non-Hispanic counterparts.

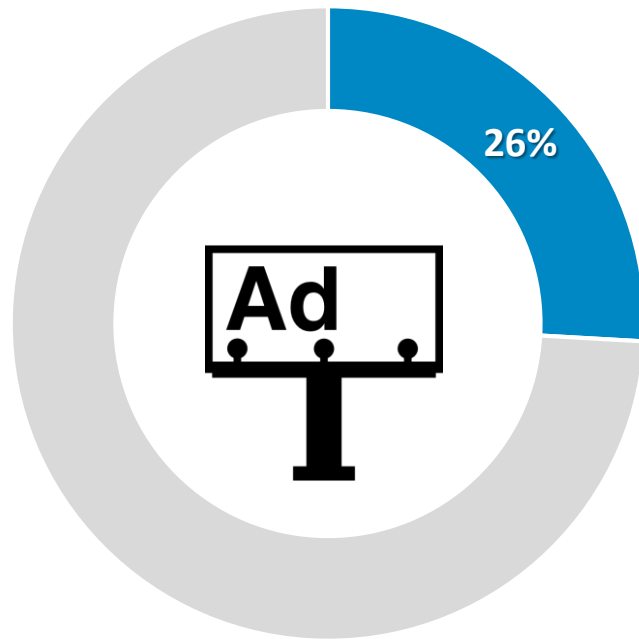
Positive Opinion Across Segments



Q15: Please indicate to what degree your opinion of these destinations is positive or negative.

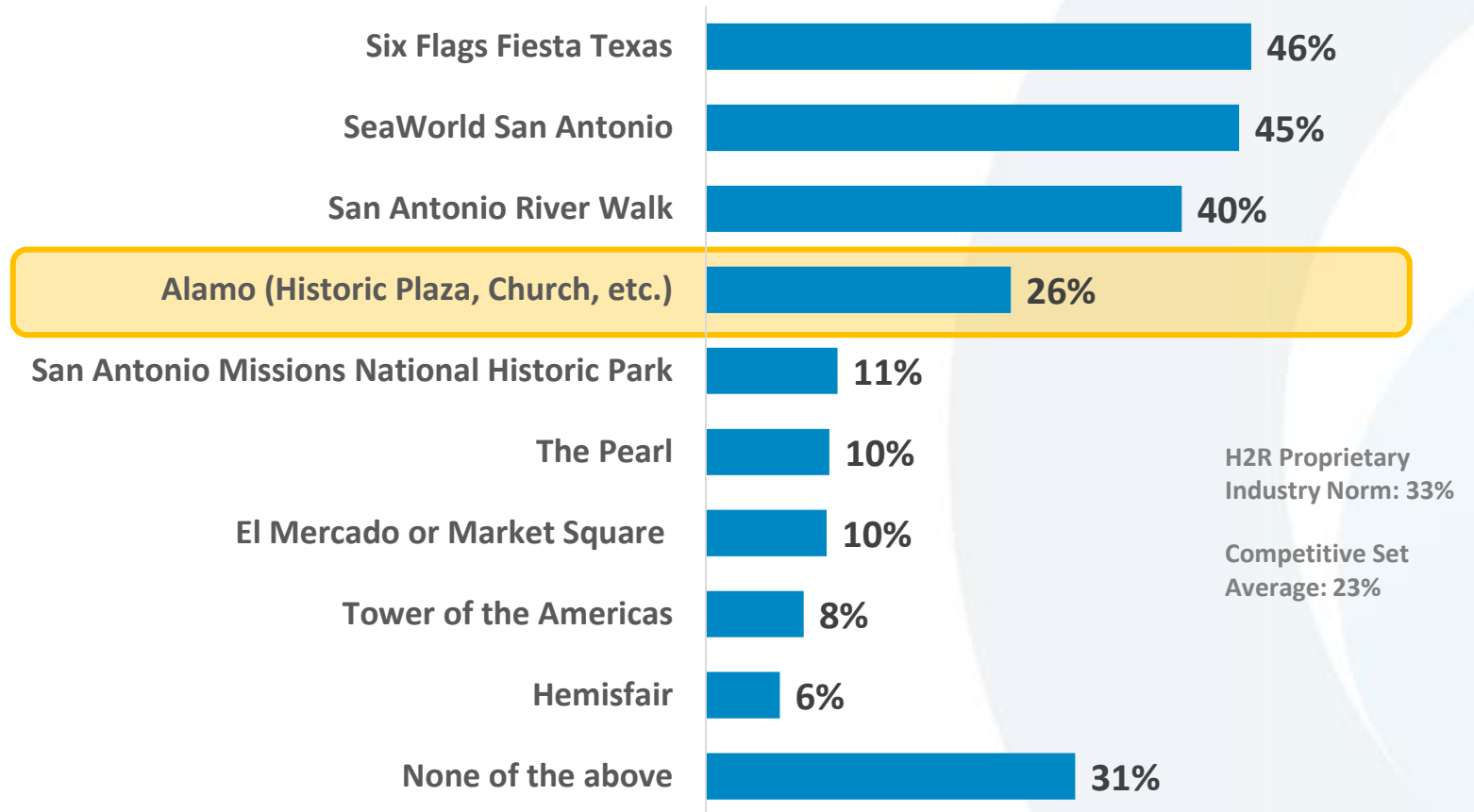
More than one-quarter of consumers recall seeing advertising for The Alamo, on par with the average for other competitive attractions.

Assisted Ad Awareness of The Alamo



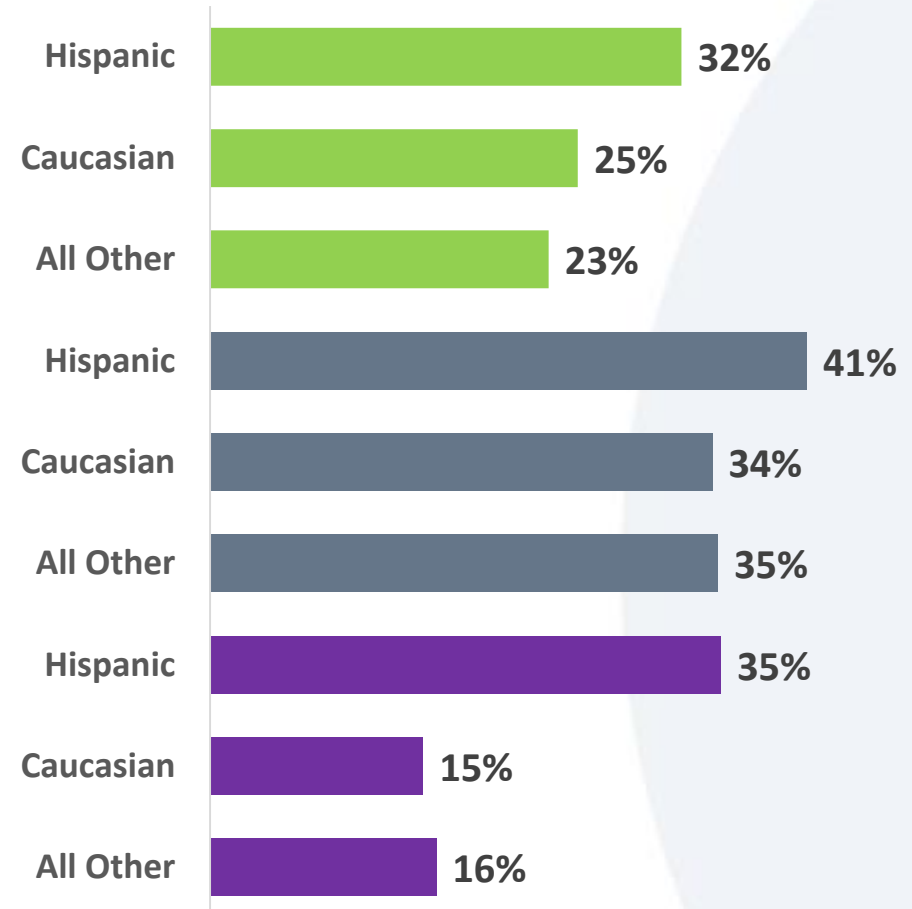
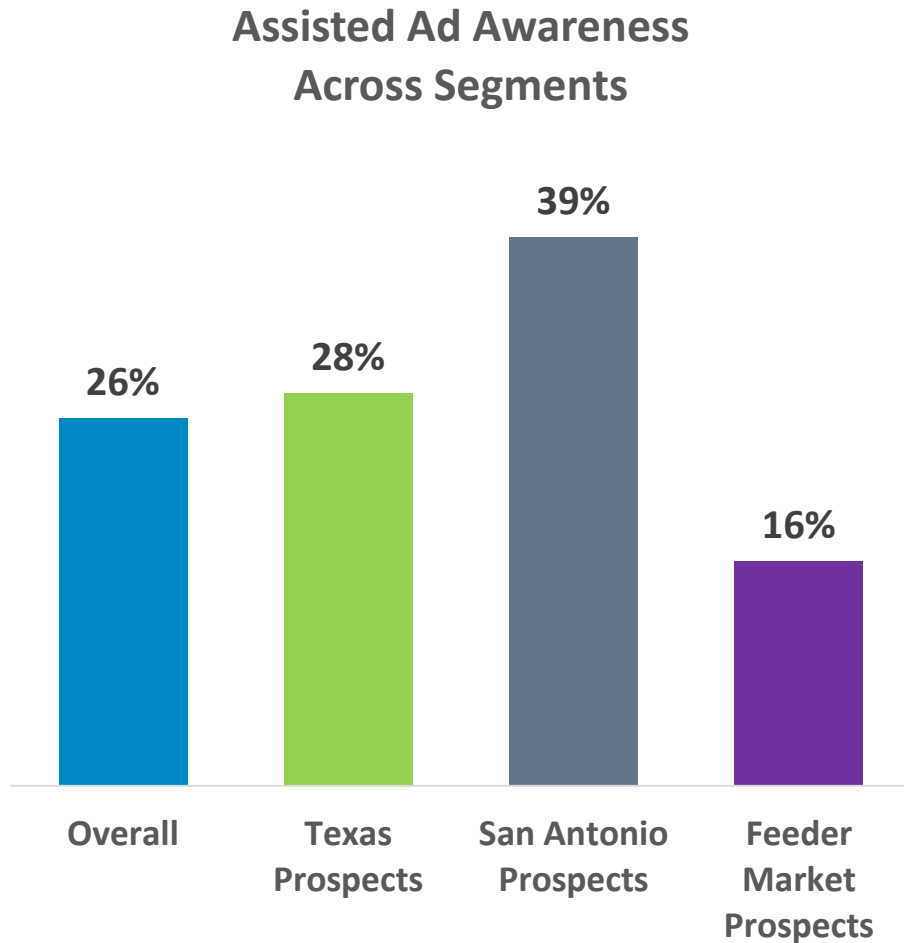
33% Among Hispanic Prospects

Assisted Ad Awareness of Competitive Attractions



Q16: Please indicate which of the following attractions (if any) you have seen or heard advertisements for in the past 12 months.

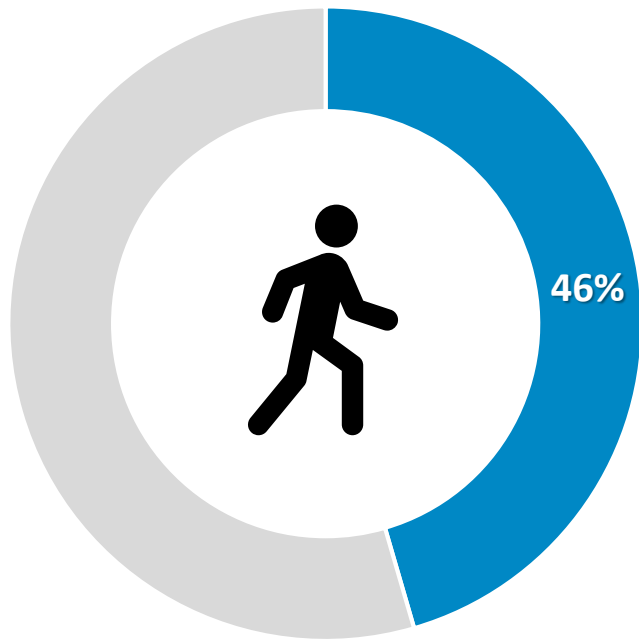
Hispanic consumers drive The Alamo's assisted advertising awareness across Texas and all Feeder Markets.



Q16: Please indicate which of the following attractions (if any) you have seen or heard advertisements for in the past 12 months.

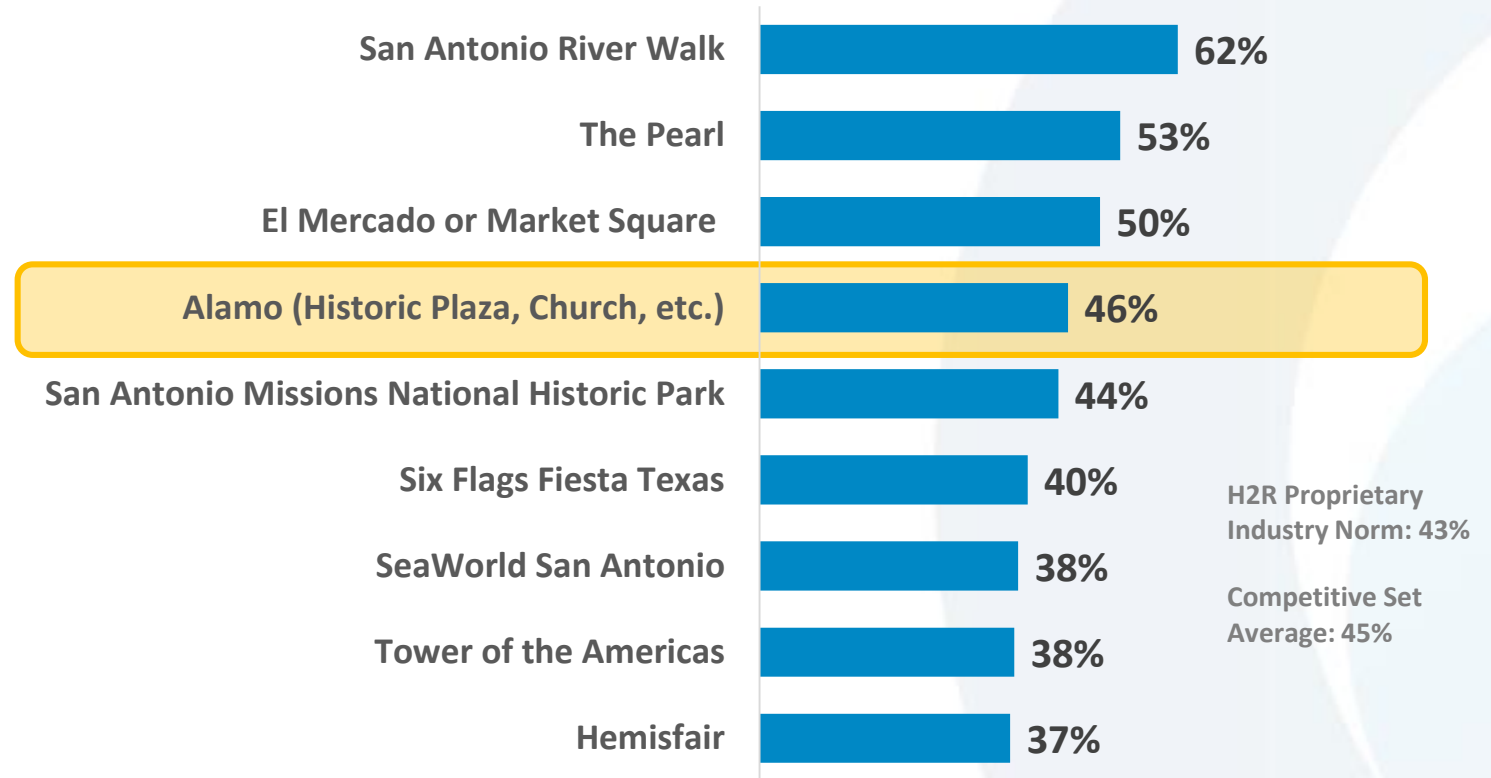
More than four in ten consumers say they intend to visit The Alamo in the next 12 months—on par with the competitive set average and H2R Norm.

Intent to Visit The Alamo



59% Among Hispanic Prospects

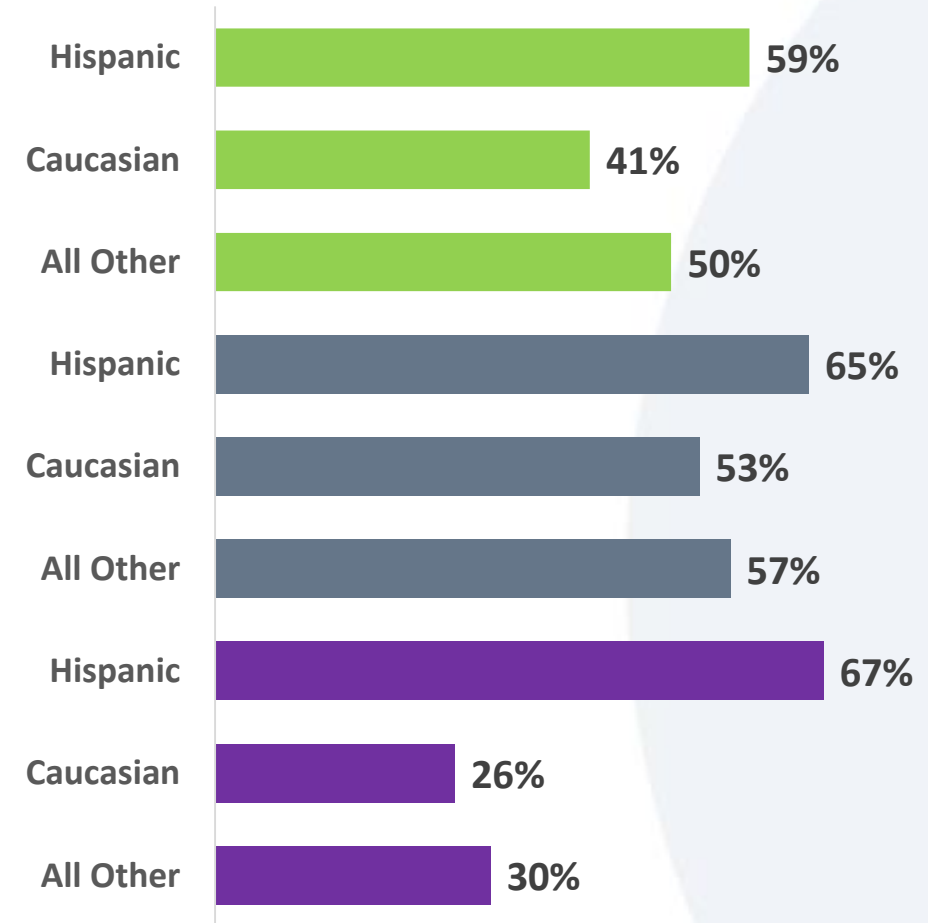
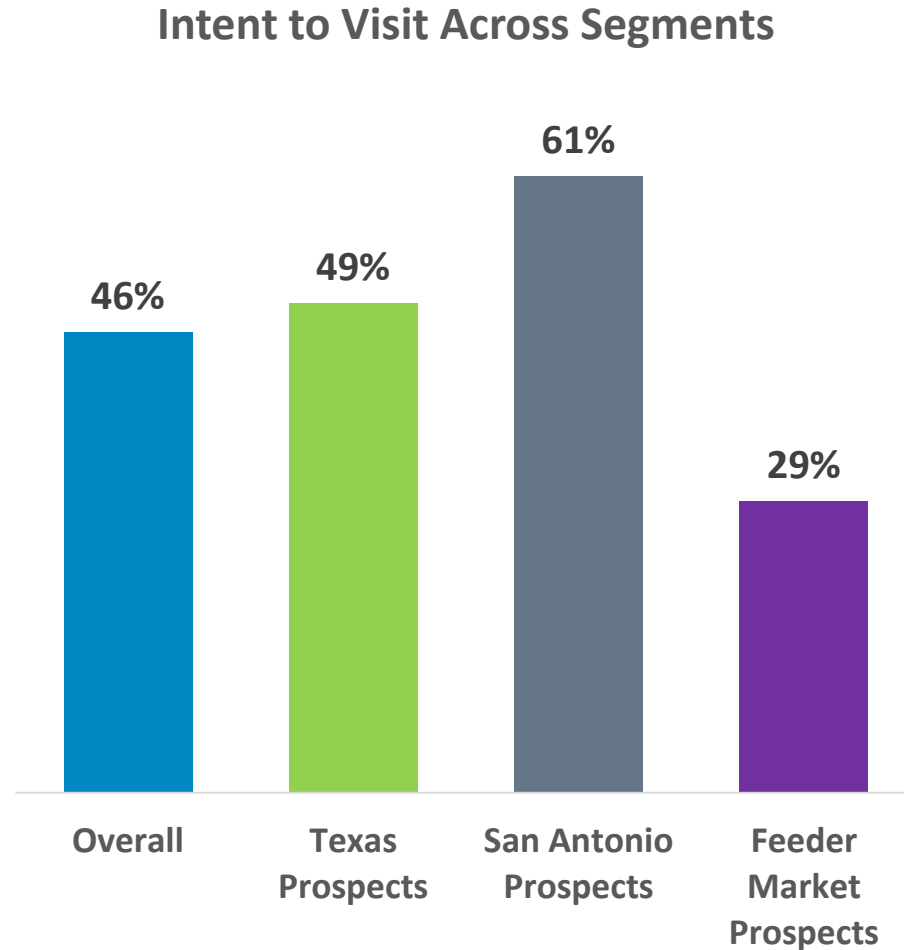
Intent to Visit Competitive Attractions



The Morey Group indicates attendance at History Museums has been 3.8% per year over the past 5 years.

Q17: Please indicate how likely you are to visit each of the following attractions in the next 12 months.

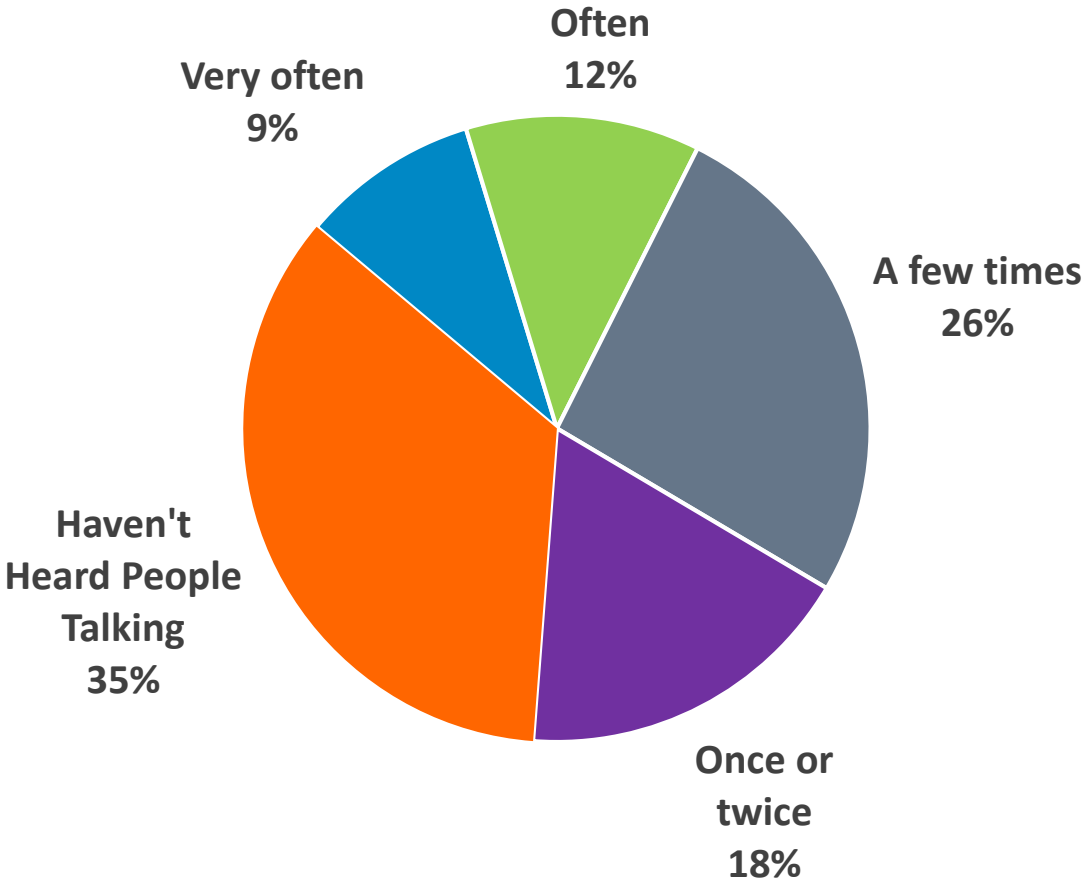
Hispanic consumers have significantly higher intent to visit The Alamo in the next 12 months than non-Hispanic consumers.



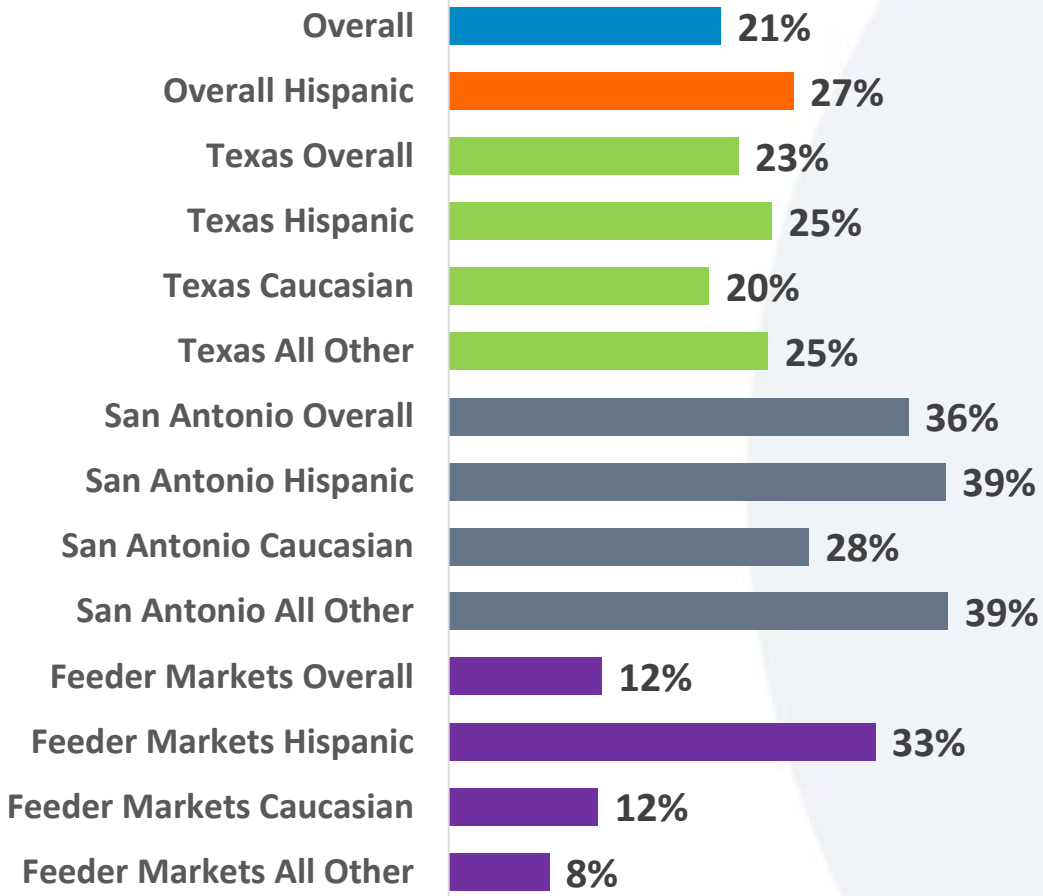
Q17: Please indicate how likely you are to visit each of the following attractions in the next 12 months.

Nearly two-thirds have heard people talking about The Alamo (65%) with more than one in five indicating market buzz occurred often/very often.

How Often Hear People Talk About The Alamo

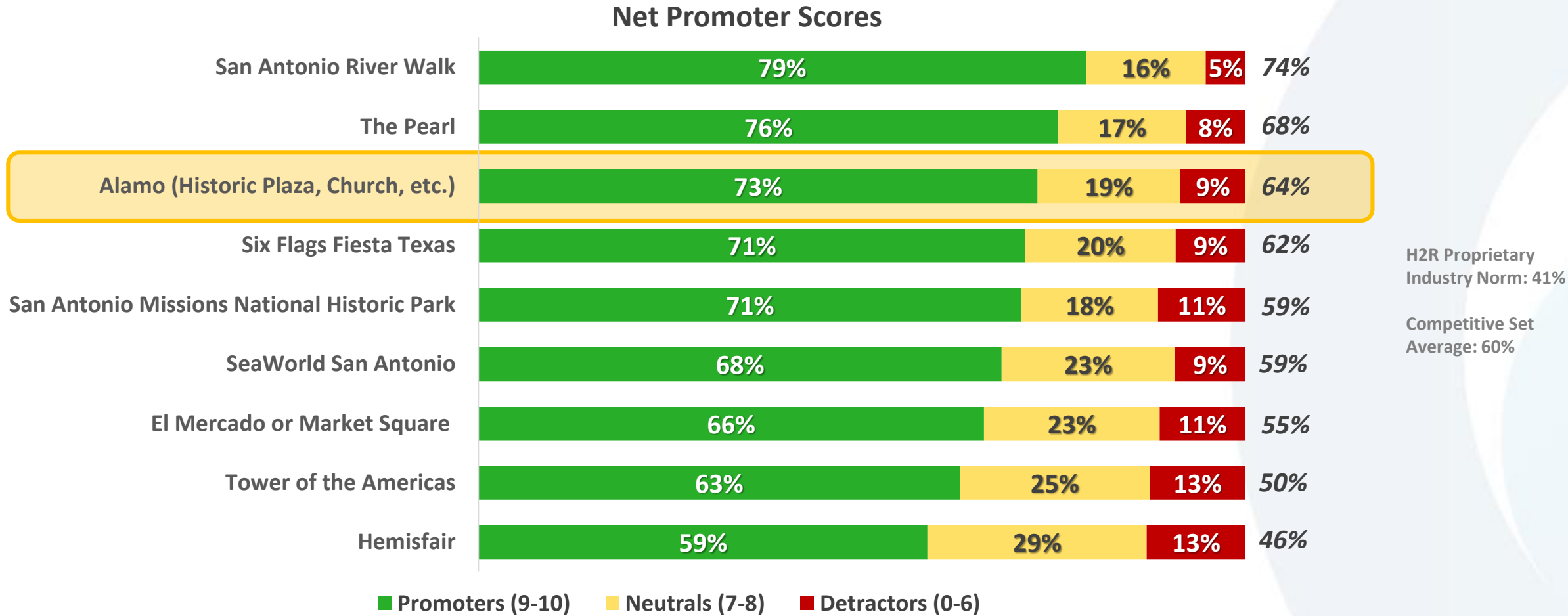


Heard Talking About Alamo Often/Very Often



Q20: In the past 6 months, how often have you heard people talking about The Alamo?

The Alamo has many brand promoters and few detractors which yields a strong Net Promoter Score at 64%—higher than the competitive set average and significantly higher than the H2R Norm.



Q18: How likely would you be to recommend visiting each of the following attractions to your friends and family?
 NOTE: See the Appendix for more information about the Net Promoter Score.

Hispanics have the most positive opinion of the Alamo, are likely to visit and more than half plan to promote the experience.

Brand Equity Summary by Segment	Overall	Texas Prospects	San Antonio Prospects	Feeder Market Prospects	Hispanic Prospects
Positive Opinion	85%	87%	88%	78%	89%
Assisted Ad Awareness	26%	28%	39%	16%	33%
Intent to Visit	46%	49%	61%	29%	59%
Net Promoter Score*	48%	48%	50%	42%	54%

*Asked among Recent Visitors.

Texas prospects have a favorable opinion of The Alamo, ranking second only to River Walk. Intent is also strong, but ranks fourth behind other area competitors. Thus, there is a notable lack of urgency to visiting.

Brand Equity Metrics Among Texas Prospects	The Alamo Rank	The Alamo	El Mercado or Market Square	Hemisfair	San Antonio Missions National Historic Park	San Antonio River Walk	SeaWorld San Antonio	Six Flags Fiesta Texas	The Pearl	Tower of America
Positive Opinion	2	87%	74%	59%	73%	90%	68%	68%	62%	62%
Assisted Ad Awareness	4	28%	11%	6%	12%	44%	52%	52%	11%	9%
Intent to Visit	4	49%	51%	36%	44%	67%	39%	41%	53%	37%
Net Promoter Score	2	48%	37%	11%	43%	61%	25%	32%	44%	19%

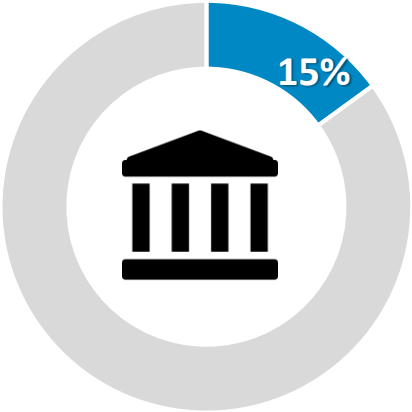
Brand Personality

03

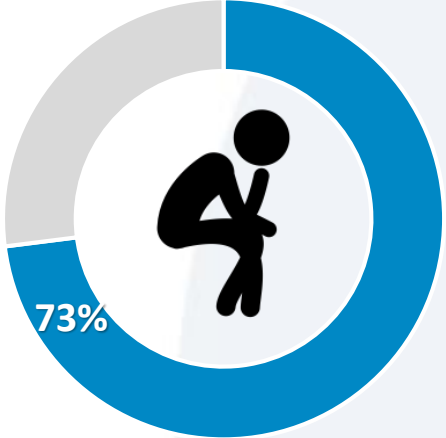
Brand Personality KPIs



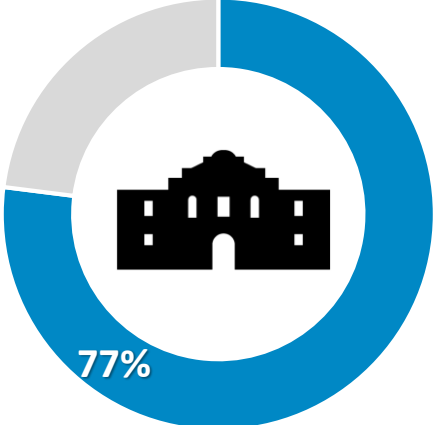
**Top Unaided Descriptor:
History**



**Top Design Element:
Reverent Space for Context**

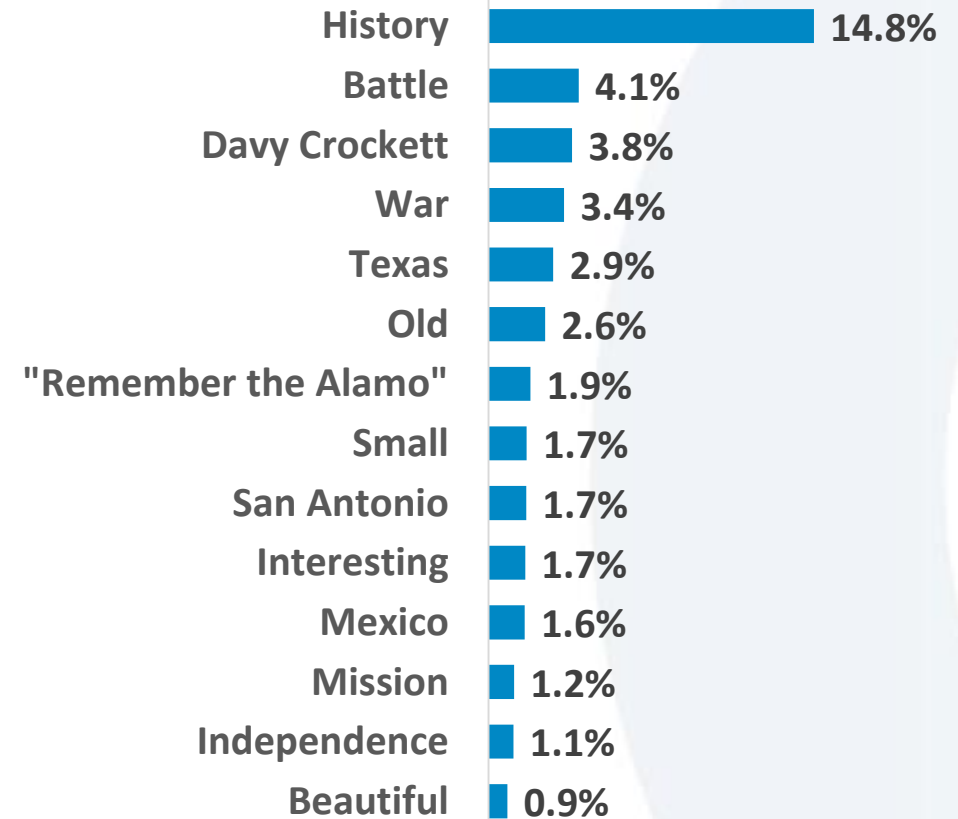
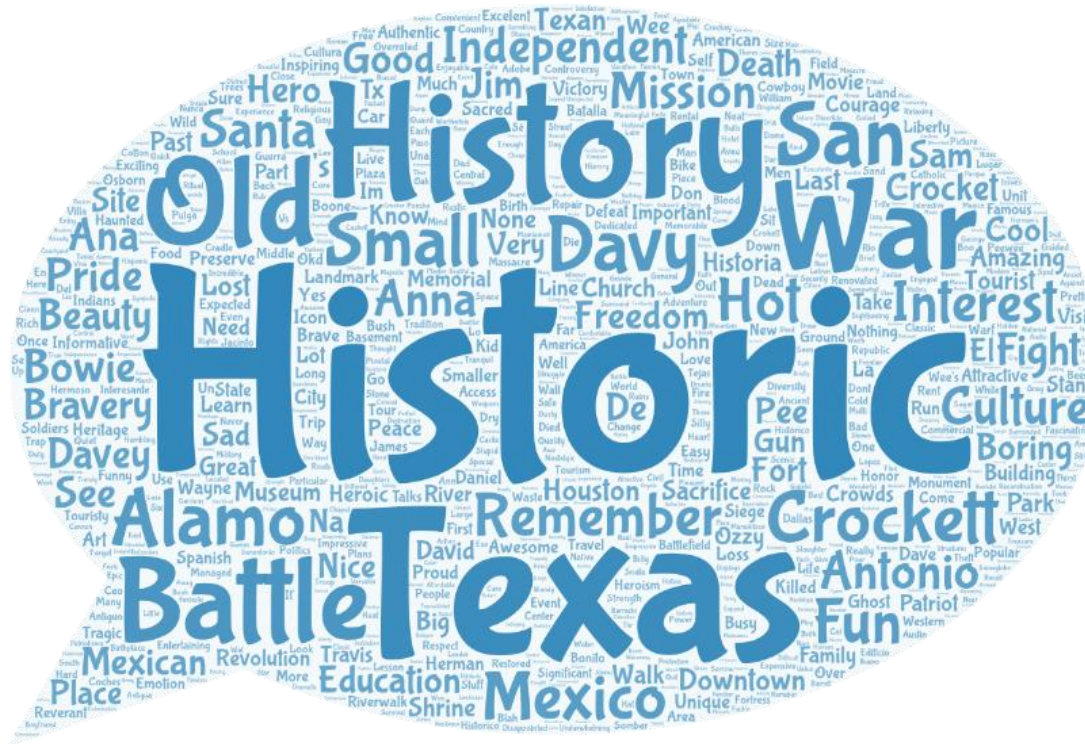


**Biggest Brand Strength:
On-Site Historic Structures**



Most of those familiar with The Alamo associate it with history.

Top of Mind Words to Describe Alamo



Q21: What word(s) first come to mind when you think of The Alamo?

Travelers are searching for historical attractions that offer a variety of things to see and do, offer plenty of shade/relief from the heat and where they can learn while having fun.

% Very/Extremely Desirable



Q12: Please indicate how desirable you find each of the following attributes or characteristics when thinking about historical/cultural attractions you would like to visit.

The Alamo's Visitors believe that on-site historic museums/structures, self-guided tours and having fun while learning best describe the attraction.

% Describes Very Well/Perfectly

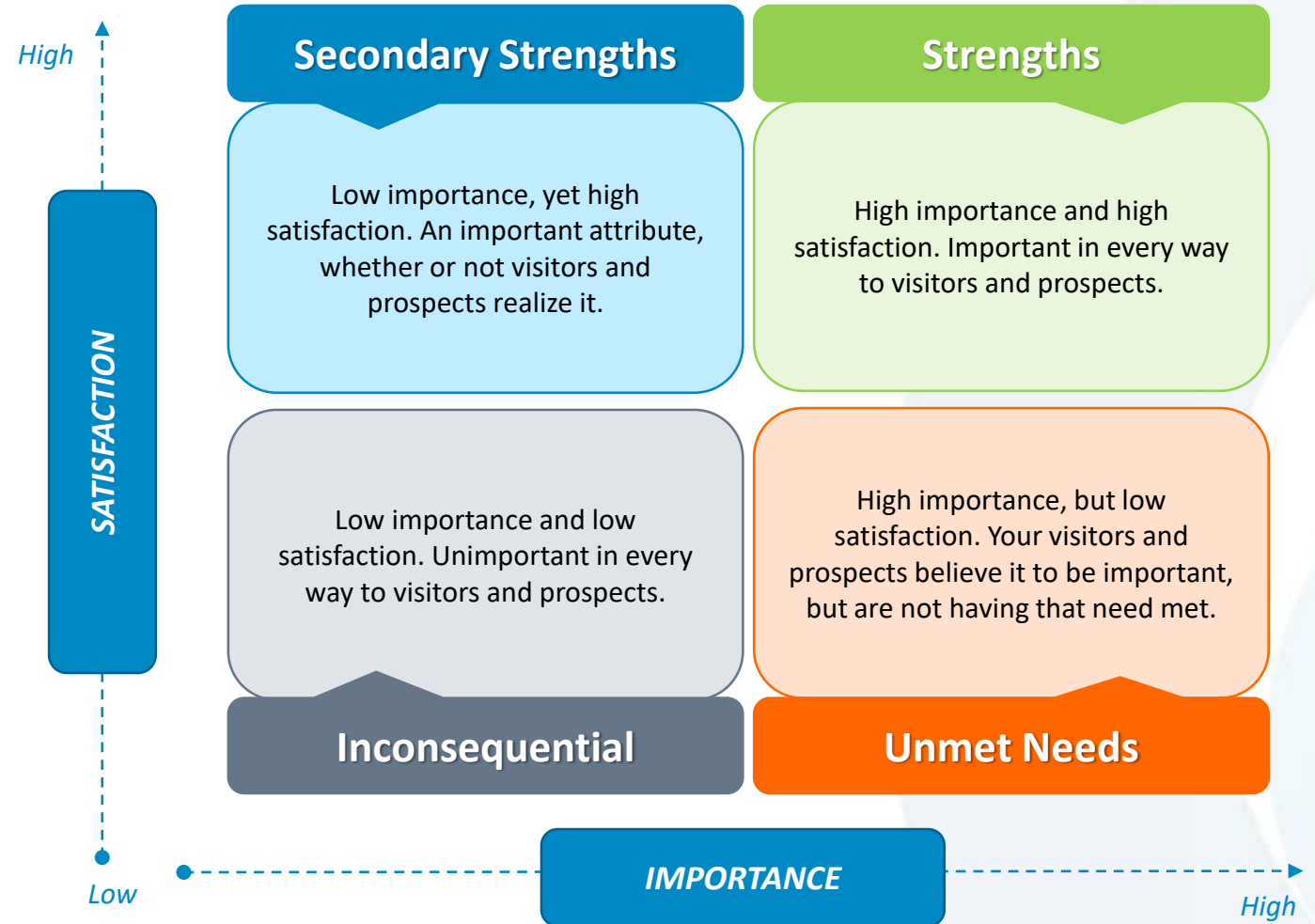


Q22: Please rate how well you believe the following attributes describe The Alamo.

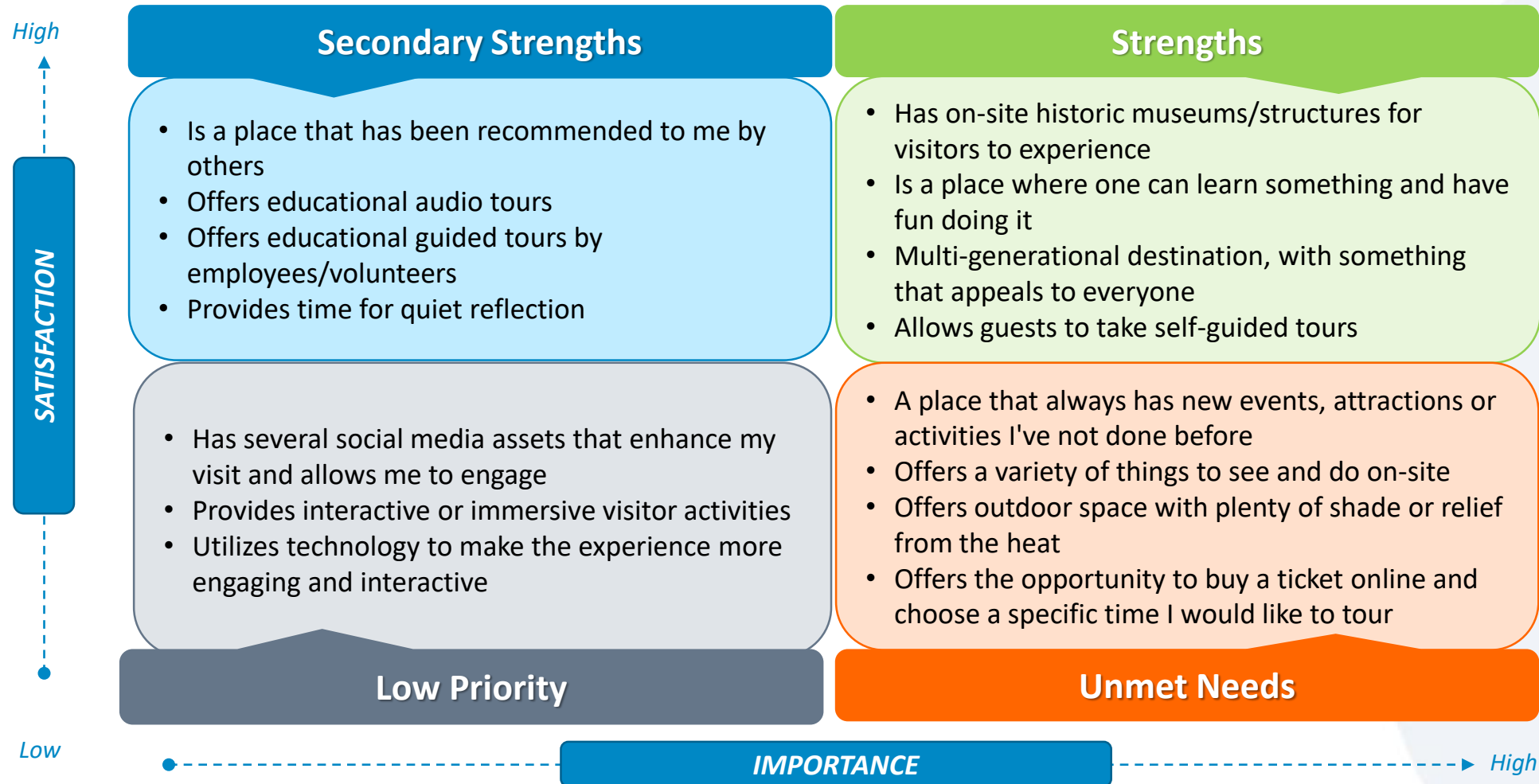
Identifying Brand Strengths and Unmet Needs

Each of The Alamo's attributes has been analyzed and segmented into four buckets in the chart to the right. This analysis evaluates the relative importance of each element of the brand alongside Visitors' satisfaction with each attribute as it relates to The Alamo.

The resulting analysis illustrates which elements of satisfaction are most important by plotting each characteristic into one of four quadrants.



The Alamo has many strengths including learning while having fun and having something for everyone. However, guests feel that there could be new events/attractions/activities more often and more variety.



Q12: Please indicate how desirable you find each of the following attributes or characteristics when thinking about historical/cultural attractions you would like to visit.
 Q22: Please rate how well you believe the following attributes describe The Alamo.

TEXAS Strengths

- Allows guests to take self-guided tours
- Has on-site historic museums/structures for visitors to experience
- Is a place where one can learn something and have fun doing it
- Multi-generational destination, with something that appeals to everyone

- A place that always has new events, attractions or activities I've not done before
- Offers a variety of things to see and do on-site
- Offers outdoor space with plenty of shade or relief from the heat
- Offers the opportunity to buy a ticket online and choose a specific time I would like to tour

Unmet Needs

SAN ANTONIO Strengths

- Allows guests to take self-guided tours
- Has on-site historic museums/structures for visitors to experience
- Is a place where one can learn something and have fun doing it
- Multi-generational destination, with something that appeals to everyone

- A place that always has new events, attractions or activities I've not done before
- Offers a variety of things to see and do on-site
- Offers outdoor space with plenty of shade or relief from the heat
- Offers the opportunity to buy a ticket online and choose a specific time I would like to tour

Unmet Needs

FEEDER MARKETS Strengths

- Allows guests to take self-guided tours
- Has on-site historic museums/structures for visitors to experience
- Is a place where one can learn something and have fun doing it

- Offers a variety of things to see and do on-site
- Offers outdoor space with plenty of shade or relief from the heat
- Offers the opportunity to buy a ticket online and choose a specific time I would like to tour

Unmet Needs

HISPANIC Strengths

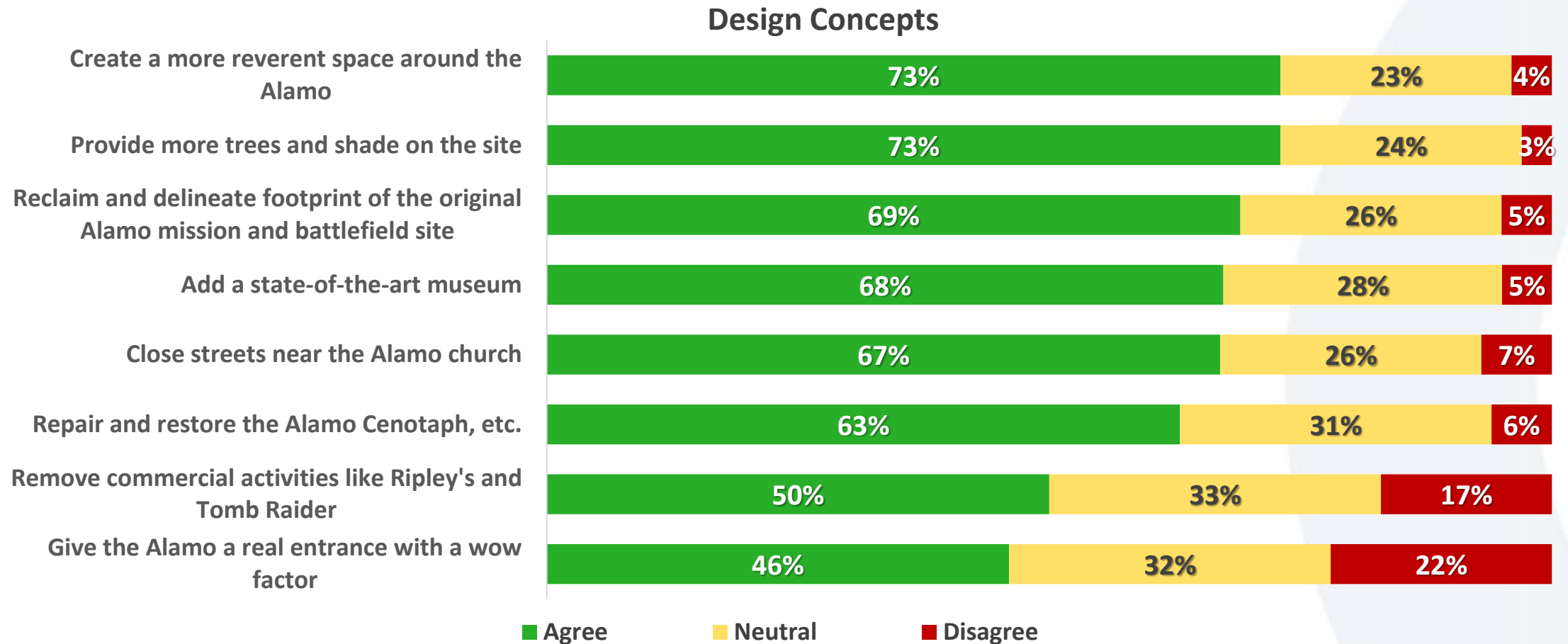
- Allows guests to take self-guided tours
- Has on-site historic museums/structures for visitors to experience
- Is a place where one can learn something and have fun doing it
- Multi-generational destination, with something that appeals to everyone
- Offers outdoor space with plenty of shade or relief from the heat

- Offers a variety of things to see and do on-site
- A place that always has new events, attractions or activities I've not done before
- Offers the opportunity to buy a ticket online and choose a specific time I would like to tour
- Provides interactive or immersive visitor activities

Unmet Needs

Q12: Please indicate how desirable you find each of the following attributes or characteristics when thinking about historical/cultural attractions you would like to visit.
Q22: Please rate how well you believe the following attributes describe The Alamo.

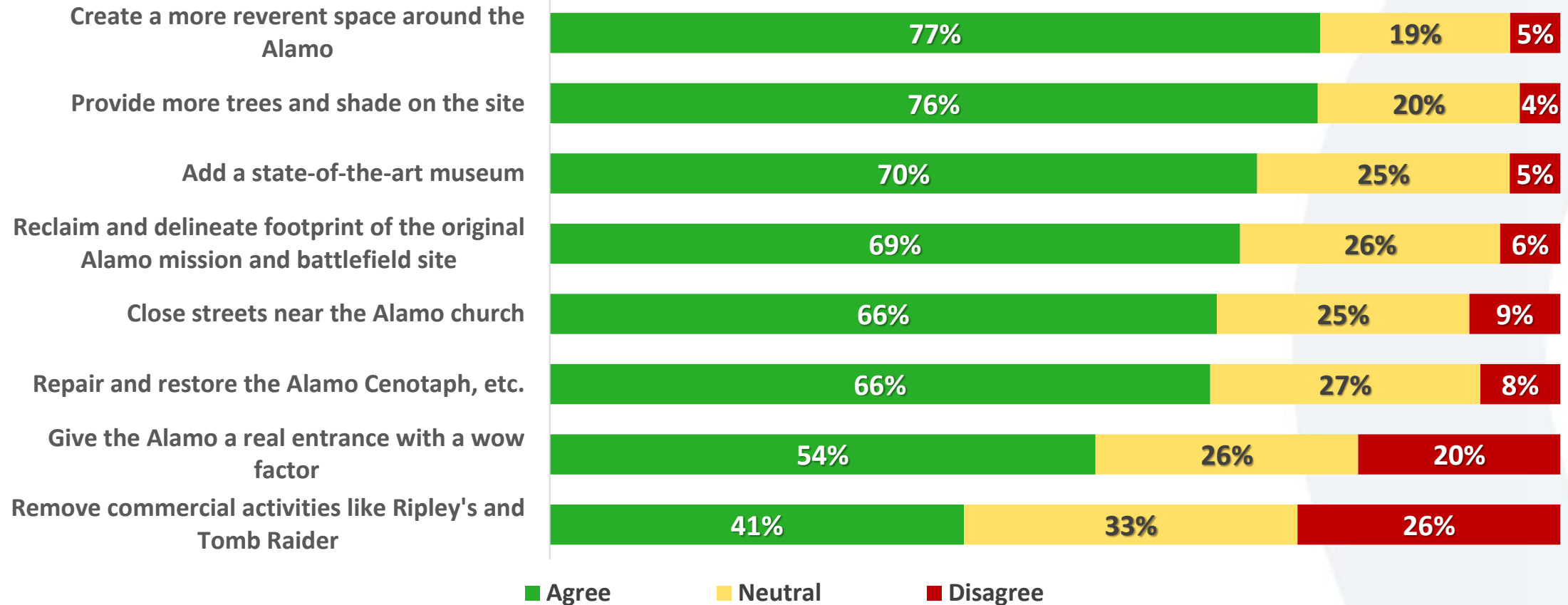
Prospects are most likely to believe The Alamo needs more reverent space and shade trees.



Q39: The Alamo.org wants to know what you think of specific design elements being considered to preserve The Alamo and improve the experience of visiting. Please indicate the degree to which you agree or disagree with each statement.

More reverent space and shade was even more important among Hispanic prospects.

Design Concepts Among Hispanic Prospects



Q39: The Alamo.org wants to know what you think of specific design elements being considered to preserve The Alamo and improve the experience of visiting. Please indicate the degree to which you agree or disagree with each statement.

Prospects across the geographic segments and Hispanics revealed similar preferences compared to the Overall.

% Agree/Strongly Agree With Statements	Overall	Texas Prospects	San Antonio Prospects	Feeder Market Prospects	Hispanic Prospects
Create a more reverent space around The Alamo where the public can fully understand the historic core and context of the site.	73%, 23%, 4%	75%, 22%, 4%	72%, 23%, 6%	69%, 29%, 3%	77%, 19%, 5%
Provide more trees and shade on the site.	73%, 24%, 3%	75%, 22%, 3%	75%, 20%, 4%	67%, 31%, 3%	76%, 20%, 4%
Reclaim and delineate the footprint of the original Alamo mission and battlefield site.	69%, 26%, 5%	70%, 25%, 5%	67%, 27%, 6%	62%, 32%, 6%	69%, 26%, 6%
Add a state-of-the-art museum that includes the Phil Collins collection of Alamo artifacts along with other collections, interactive exhibits, and theaters about The Alamo story.	68%, 28%, 5%	70%, 26%, 4%	70%, 25%, 5%	58%, 38%, 4%	70%, 25%, 5%
Close streets near The Alamo church so the plaza in front of the church is for pedestrians only.	67%, 26%, 7%	68%, 25%, 7%	59%, 26%, 15%	63%, 33%, 4%	66%, 25%, 9%
Repair/restore The Alamo Cenotaph, add names of missing Defenders, relocate the Cenotaph to a prominent location outside the historic mission footprint, visible from the Church.	63%, 31%, 6%	66%, 28%, 6%	62%, 28%, 9%	54%, 42%, 5%	66%, 27%, 8%
Remove commercial activities like Ripley's and Tomb Raider from the historic core around The Alamo church.	50%, 33%, 17%	51%, 32%, 17%	44%, 33%, 23%	50%, 38%, 12%	41%, 33%, 26%
Give The Alamo a real entrance with a wow factor.	46%, 32%, 22%	48%, 30%, 22%	51%, 26%, 23%	38%, 41%, 21%	54%, 26%, 20%

Green font = Agreed
 Yellow font = Neutral
 Red font = Disagree

Q39: The Alamo.org wants to know what you think of specific design elements being considered to preserve The Alamo and improve the experience of visiting. Please indicate the degree to which you agree or disagree with each statement.

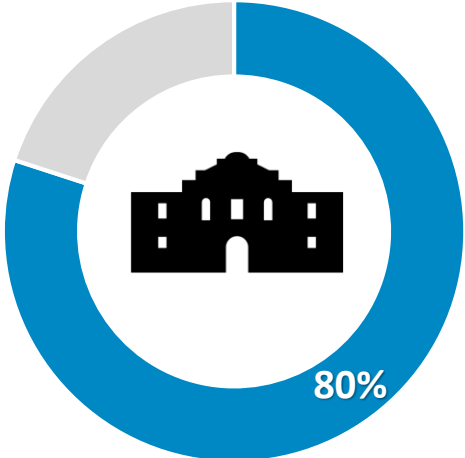
Visitors

04

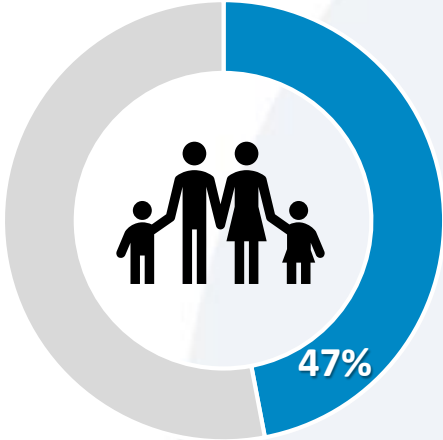
Visitor Behavior KPIs



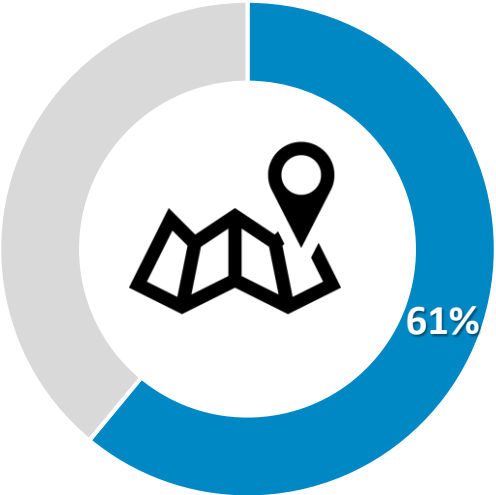
Entered The Alamo



Families

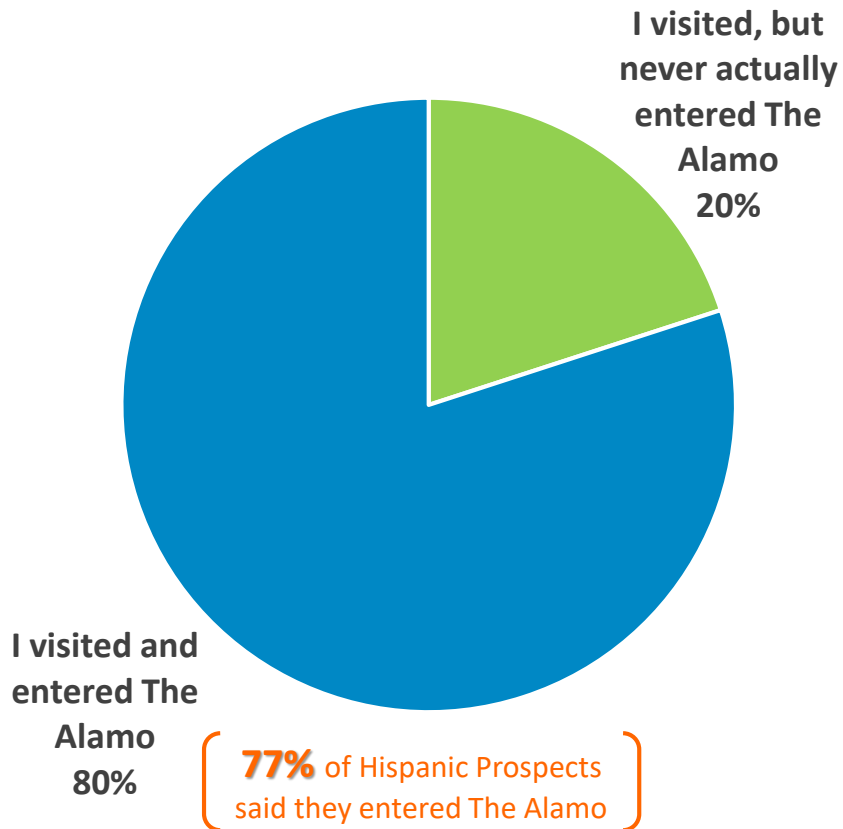


Self-Guided Tour

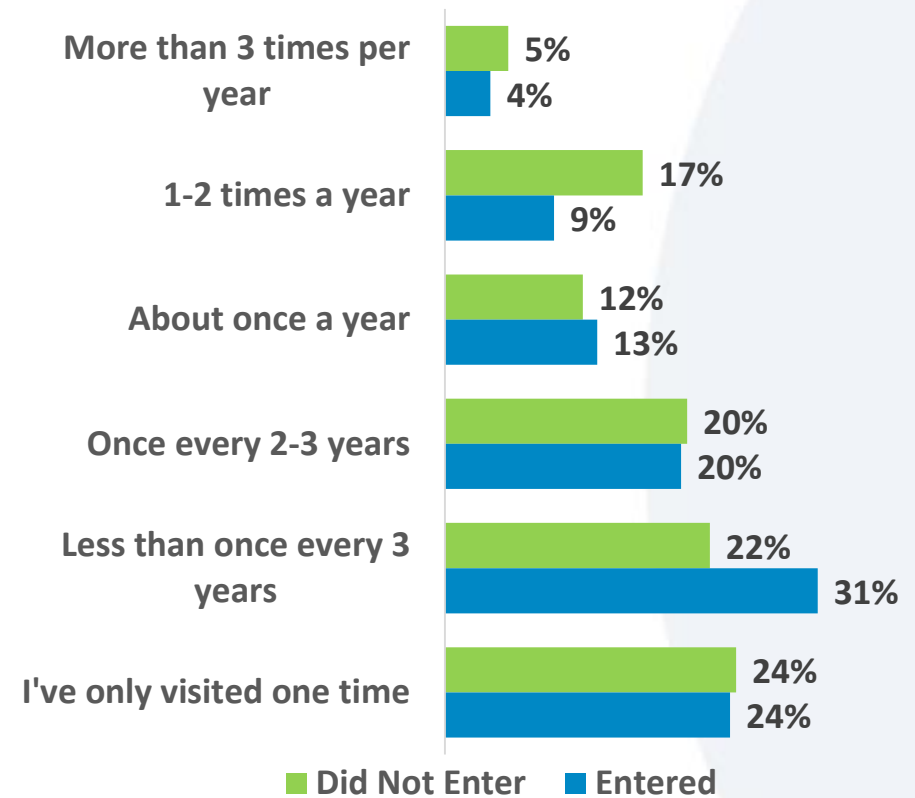


One in five Visitors don't actually enter The Alamo when they visit. Those who did not enter indicated they visit The Alamo more often than those who entered on their most recent visit.

Best Describes Visit



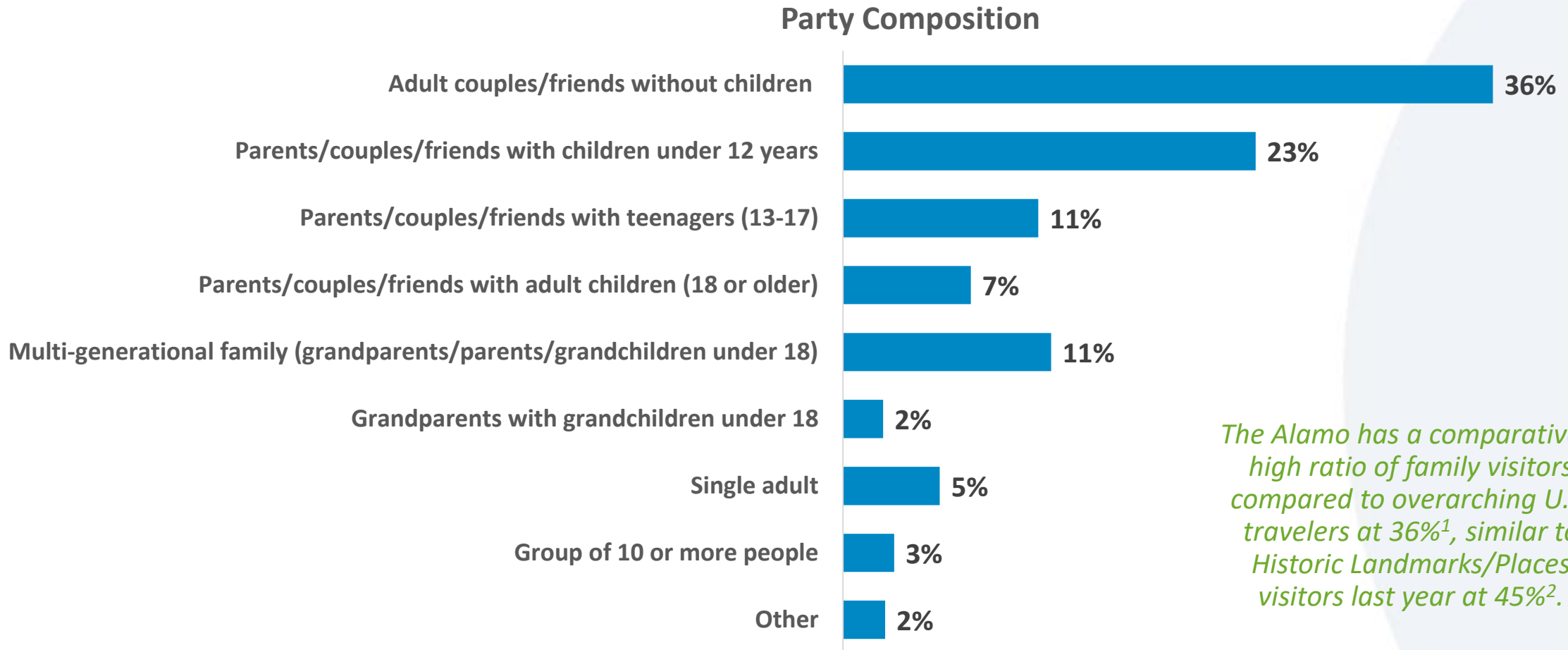
Frequency of Visitation



Q23: Which of the following best describes your most recent visit to The Alamo?

Q24: How often do you typically visit The Alamo?

Nearly half of Visitors (47%) indicated they visited The Alamo with children under 18 in their party.



The Alamo has a comparatively high ratio of family visitors compared to overarching U.S. travelers at 36%¹, similar to Historic Landmarks/Places visitors last year at 45%².

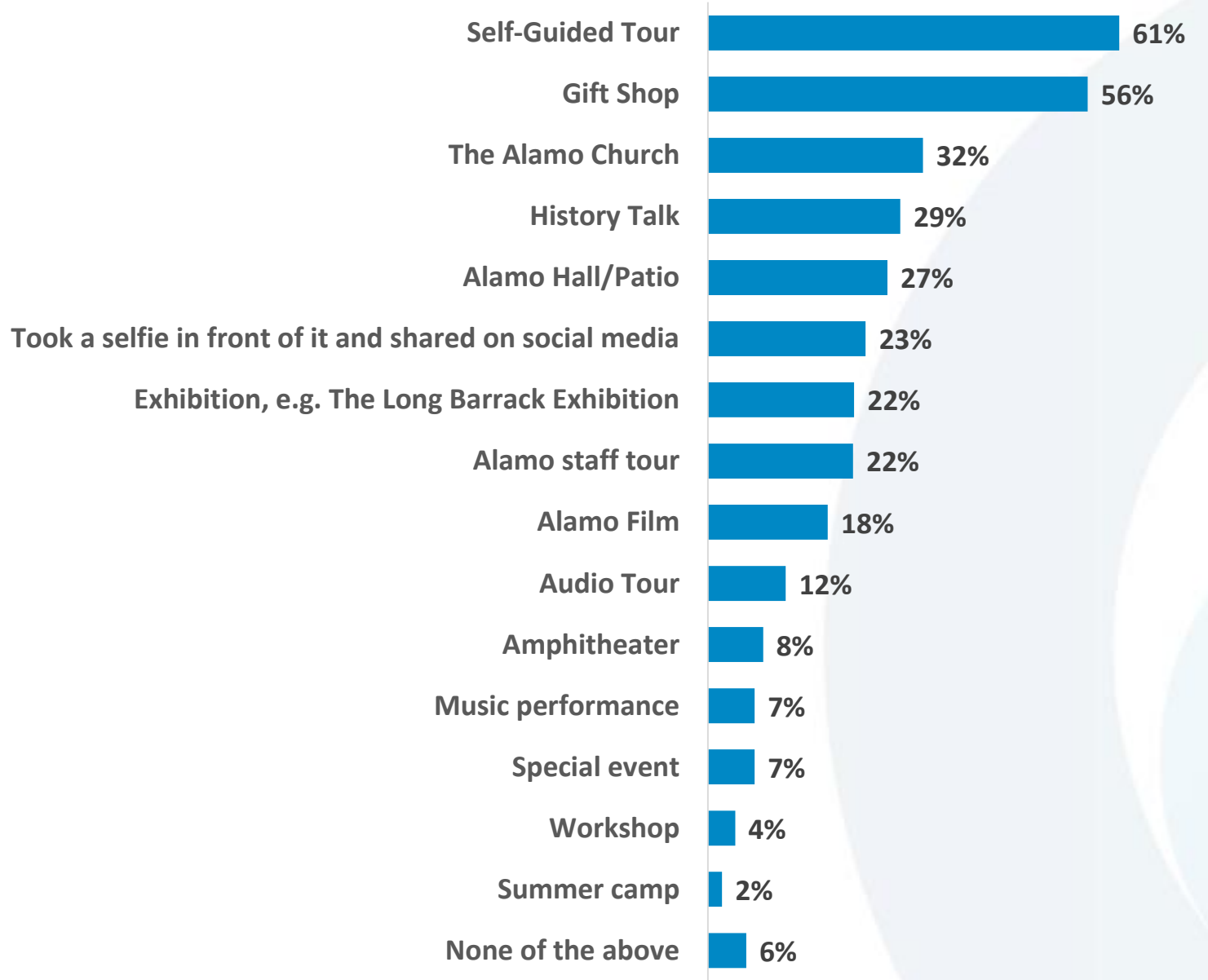
Q29: Which of the following best describes the composition of your immediate party on your most recent visit:

¹OmniTrak (May 2018), *TravelTrakAmerica*. ²PGAV Destinations & H2R Market Research (April 2018), *Voice of the Visitor 2018*.

Activity Participation

Alamo Visitors were most likely to take a self-guided tour or visit the gift shop. The Alamo Church, History Talk and Alamo Hall/Patio made up the top five activities overall.

Hispanic visitors were also most likely to visit the Gift Shop (61%) and take Self-Guided Tours (57%). Taking a selfie and posting to social media (34%), Attending the History Talk (33%) and Alamo Hall/Patio (26%) rounded out Hispanic visitors' top activities.



Q27: Which of the following activities, attractions or tours did you participate in during your previous visits to The Alamo? Please select all that apply.

Feeder Market Visitors are significantly more likely to have just visited The Alamo once. They are also more likely to have visited The Alamo Church, but less likely to have taken the self-guided tour.

Visitor Metrics by Segment	Overall	Texas Prospects	San Antonio Prospects	Feeder Market Prospects	Hispanic Prospects
Visited, But Did Not Enter	20%	20%	23%	23%	23%
Visited & Entered	80%	80%	78%	77%	77%
Have Visited Once	24%	21%	10%	53%	17%
Have Visited More Than Once	76%	79%	90%	47%	83%
Visit with Children Under 18	47%	48%	53%	34%	60%
Took Self-Guided Tour*	61%	61%	61%	55%	57%
Visited the Gift Shop*	56%	57%	58%	50%	61%
Visited The Alamo Church*	32%	31%	26%	43%	26%

*Asked of Visitors who entered The Alamo.

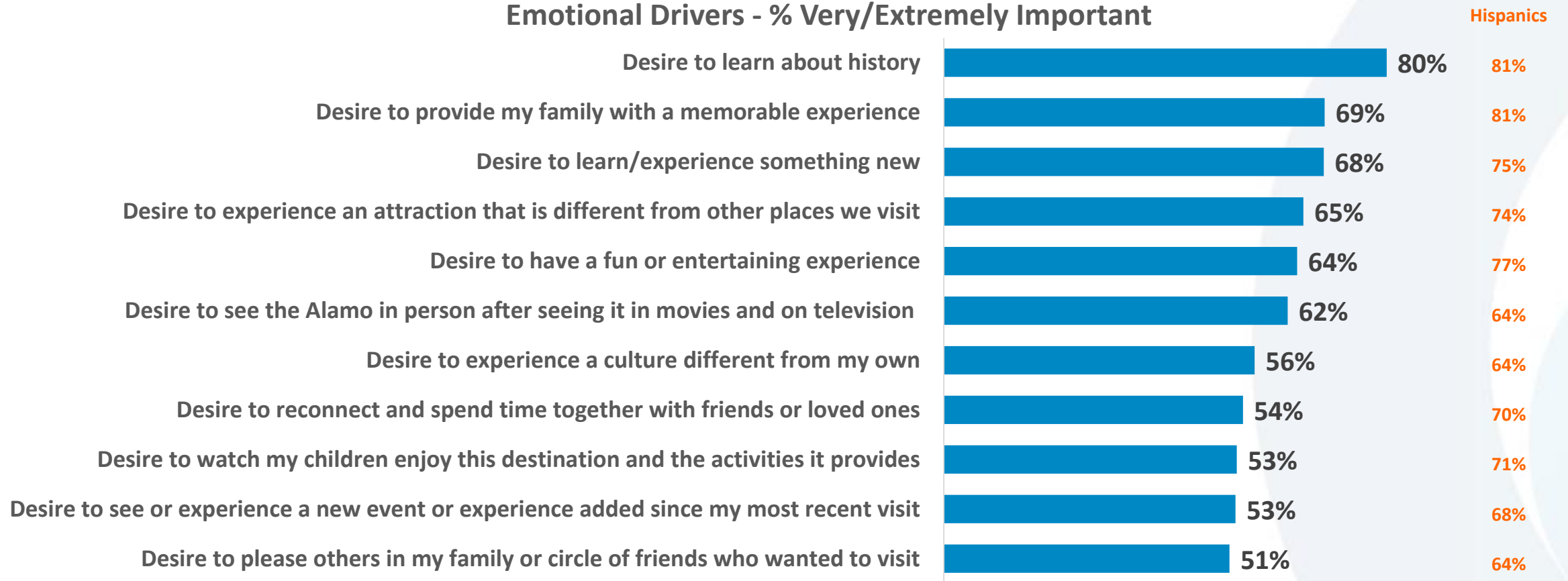
Older Hispanic prospects were more likely to enter the Alamo, but were less likely to visit with children in their party.

Visitor Metrics by Segment	Hispanic Prospects		
	Overall	18-54 years	55+ years
Visited, But Did Not Enter	23%	25%	13%
Visited & Entered	77%	75%	87%
Have Visited Once	17%	18%	13%
Have Visited More Than Once	83%	82%	87%
Visit with Children Under 18	60%	64%	45%
Took Self-Guided Tour*	57%	57%	59%
Visited the Gift Shop*	61%	60%	62%
Visited The Alamo Church*	26%	25%	30%

*Asked of Visitors who entered The Alamo.

Emotional drivers for visiting The Alamo include a desire to learn about history, to provide a memorable experience and to learn something new.

Emotional Drivers - % Very/Extremely Important



Q28: Please indicate how important the following issues were in motivating or inspiring you to visit The Alamo.

Younger Hispanic prospects were significantly more likely to be motivated by a desire to learn/experience something new, reconnect and spend time with friends/loved ones and experience a new event.

Emotional Drivers - % Very/Extremely Important	Hispanic Prospects		
	Overall	18-54 years	55+ years
Desire to learn about history	81%	82%	76%
Desire to provide my family with a memorable experience	81%	83%	71%
Desire to have a fun or entertaining experience	77%	80%	64%
Desire to learn/experience something new	75%	79%	61%
Desire to experience an attraction that is different from other places we visit	74%	76%	66%
Desire to watch my children enjoy this destination and the activities it provides	71%	73%	63%
Desire to reconnect and spend time together with friends or loved ones	70%	74%	56%
Desire to see or experience a new event or experience added since my most recent visit	68%	72%	54%
Desire to please others in my family or circle of friends who wanted to visit	64%	66%	59%
Desire to experience a culture different from my own	64%	67%	52%
Desire to see the Alamo in person after seeing it in movies and on television	64%	66%	57%

Q28: Please indicate how important the following issues were in motivating or inspiring you to visit The Alamo.

The Alamo's Visitors are slightly more likely to be adult only households with higher average incomes. Otherwise, demographics are remarkably similar to Non-Visitors.

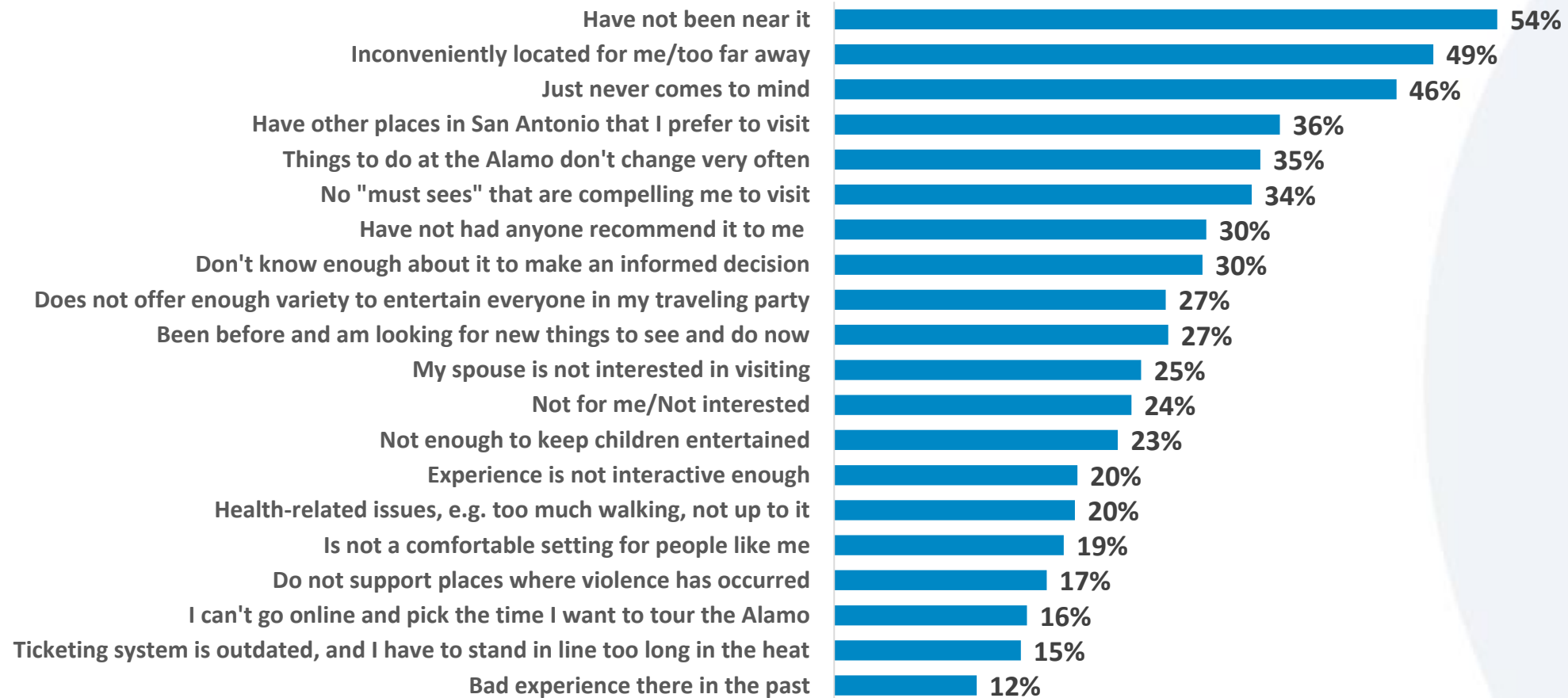
	Overall	Visitors	Non-Visitors
Average Adult HH Age	46	47	43
Average Child HH Age	9	9	8
Household Size	3	3	3
Family Households	38%	37%	40%
Adult Households	62%	63%	60%
College Graduate +	59%	59%	57%
Household Income	\$88.6k	\$90.1k	\$83.3k

Barriers to Visitation

05

Consumers who haven't visited The Alamo say that they have not been near it or that it's too far away. Not being top of mind is also a barrier.

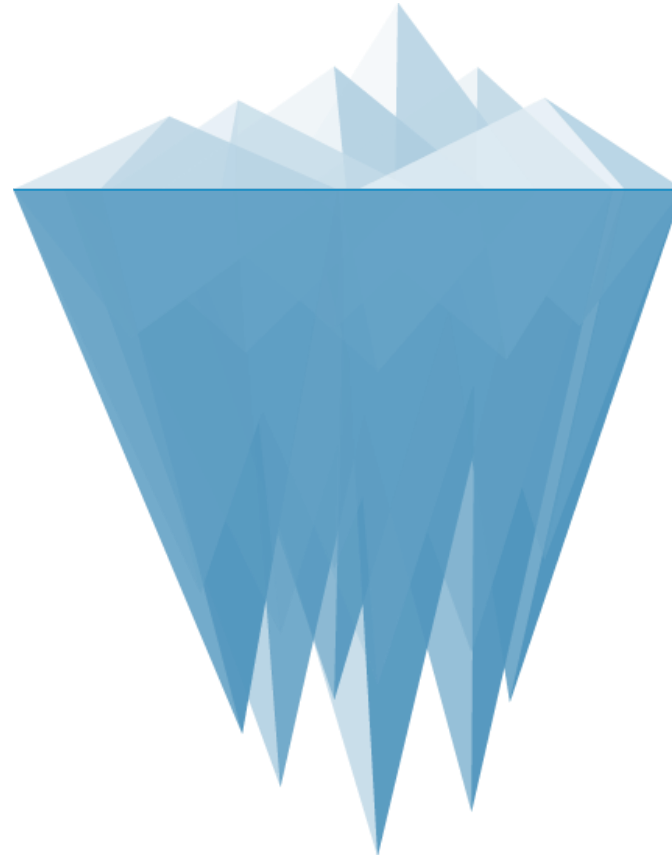
Stated Barriers - % Agree/Strongly Agree



Q31: Please rate how strongly you agree with the following reasons for why you have not visited The Alamo recently, if ever.

Stated vs. Derived Barriers

- On the surface, Non-Visitors often provide fairly standard excuses for not visiting, which we refer to as *stated barriers* to visitation.
- Correlation analysis reveals to what extent non-visitors' stated barriers match up with their intent to visit The Alamo. Arguably, the higher the correlation a barrier has with intent to visit, the more credible the hurdle is as a root cause of not visiting. Those that correlate highest are referred to as *derived barriers*.



Stated Barriers

(what travelers *said* is keeping them from visiting The Alamo)

Derived Barriers

(what *actually* correlates with their intent to visit The Alamo)

Among the Overall, a lack of interest is far more likely to be a more credible cause for not visiting The Alamo than what was stated.

STATED BARRIERS – Top 15

1.	Have not been near it
2.	Inconveniently located for me/too far away
3.	Just never comes to mind
4.	Have other places in San Antonio that I prefer to visit
5.	Things to do at The Alamo don't change very often
6.	No "must sees" that are compelling me to visit
7.	Have not had anyone recommend it to me
5.	Don't know enough about it to make an informed decision
9.	Does not offer enough variety to entertain everyone in my traveling party
10.	Been before and am looking for new things to see and do now
11.	My spouse is not interested in visiting
12.	Not for me/Not interested
13.	Not enough to keep children entertained
14.	Experience is not interactive enough
15.	Health-related issues, e.g. too much walking, not up to it

DERIVED BARRIERS – Top 15

1.	Just never comes to mind
2.	Not for me/Not interested
3.	No "must sees" that are compelling me to visit
4.	Have not been near it
5.	Does not offer enough variety to entertain everyone in my traveling party
6.	Inconveniently located for me/too far away
7.	Have not had anyone recommend it to me
5.	My spouse is not interested in visiting
9.	Things to do at The Alamo don't change very often
10.	Experience is not interactive enough
11.	Don't know enough about it to make an informed decision
12.	Have other places in San Antonio that I prefer to visit
13.	Is not a comfortable setting for people like me
14.	Not enough to keep children entertained
15.	Ticketing system is outdated, and I have to stand in line too long in the heat

Q17: Please indicate how likely you are to visit each of the following attractions in the next 12 months.

Q31: Please rate how strongly you agree with the following reasons for why you have not visited The Alamo recently, if ever.

The same is true among Texas prospects: a lack of interest tops the list of derived barriers.

STATED BARRIERS – Top 15

1.	Have other places in San Antonio that I prefer to visit
2.	Things to do at The Alamo don't change very often
3.	Have not been near it
4.	Inconveniently located for me/too far away
5.	Just never comes to mind
6.	Been before and am looking for new things to see and do now
7.	No "must sees" that are compelling me to visit
5.	Does not offer enough variety to entertain everyone in my traveling party
9.	Not enough to keep children entertained
10.	Have not had anyone recommend it to me
11.	My spouse is not interested in visiting
12.	Don't know enough about it to make an informed decision
13.	Experience is not interactive enough
14.	Health-related issues, e.g. too much walking, not up to it
15.	Not for me/Not interested

DERIVED BARRIERS – Top 15

1.	Not for me/Not interested
2.	Just never comes to mind
3.	Have other places in San Antonio that I prefer to visit
4.	No "must sees" that are compelling me to visit
5.	Does not offer enough variety to entertain everyone in my traveling party
6.	My spouse is not interested in visiting
7.	Things to do at The Alamo don't change very often
5.	Been before and am looking for new things to see and do now
9.	Not enough to keep children entertained
10.	Experience is not interactive enough
11.	Have not had anyone recommend it to me
12.	Is not a comfortable setting for people like me
13.	Have not been near it
14.	Ticketing system is outdated, and I have to stand in line too long in the heat
15.	I can't go online and pick the time I want to tour The Alamo

Q17: Please indicate how likely you are to visit each of the following attractions in the next 12 months.

Q31: Please rate how strongly you agree with the following reasons for why you have not visited The Alamo recently, if ever.

Among Feeder Market prospects, correlation analysis reveals similar root causes compared to what was stated. Compared to Texas prospects, those in the Feeder Markets are more likely to cite inconvenient location/distance.

STATED BARRIERS – Top 15

1. Have not been near it
2. Inconveniently located for me/too far away
3. Just never comes to mind
4. Don't know enough about it to make an informed decision
5. No "must sees" that are compelling me to visit
6. Have not had anyone recommend it to me
7. Not for me/Not interested
5. Things to do at The Alamo don't change very often
9. My spouse is not interested in visiting
10. Does not offer enough variety to entertain everyone in my traveling party
11. Have other places in San Antonio that I prefer to visit
12. Not enough to keep children entertained
13. Been before and am looking for new things to see and do now
14. Do not support places where violence has occurred
15. Is not a comfortable setting for people like me

DERIVED BARRIERS – Top 15

1. Just never comes to mind
2. Not for me/Not interested
3. No "must sees" that are compelling me to visit
4. Inconveniently located for me/too far away
5. Have not had anyone recommend it to me
6. Don't know enough about it to make an informed decision
7. Things to do at The Alamo don't change very often
5. Does not offer enough variety to entertain everyone in my traveling party
9. Have not been near it
10. My spouse is not interested in visiting
11. Experience is not interactive enough
12. Is not a comfortable setting for people like me
13. Have other places in San Antonio that I prefer to visit
14. Ticketing system is outdated, and I have to stand in line too long in the heat
15. Do not support places where violence has occurred

Q17: Please indicate how likely you are to visit each of the following attractions in the next 12 months.

Q31: Please rate how strongly you agree with the following reasons for why you have not visited The Alamo recently, if ever.

RESPONDENT BASE: FEEDER MARKET NON-VISITORS/LAPSED VISITORS DIDN'T ENTER ALAMO | N=249

Hispanics have similar barriers overall but are more likely to cite a preference for other San Antonio attractions and a lack of interest from their spouse.

STATED BARRIERS – Top 15

1.	Have other places in San Antonio that I prefer to visit
2.	Just never comes to mind
3.	Things to do at the Alamo don't change very often
4.	Have not been near it
5.	Inconveniently located for me/too far away
6.	Been before and am looking for new things to see and do now
7.	Does not offer enough variety to entertain everyone in my traveling party
5.	No "must sees" that are compelling me to visit
9.	Not enough to keep children entertained
10.	Experience is not interactive enough
11.	My spouse is not interested in visiting
12.	Not for me/Not interested
13.	Have not had anyone recommend it to me
14.	Don't know enough about it to make an informed decision
15.	Health-related issues, e.g. too much walking, not up to it

DERIVED BARRIERS – Top 15

1.	Just never comes to mind
2.	Not for me/Not interested
3.	Have other places in San Antonio that I prefer to visit
4.	Does not offer enough variety to entertain everyone in my traveling party
5.	My spouse is not interested in visiting
6.	Experience is not interactive enough
7.	Been before and am looking for new things to see and do now
5.	No "must sees" that are compelling me to visit
9.	Have not been near it
10.	Things to do at the Alamo don't change very often
11.	Ticketing system is outdated, and I have to stand in line too long in the heat
12.	Not enough to keep children entertained
13.	Don't know enough about it to make an informed decision
14.	I can't go online and pick the time I want to tour the Alamo
15.	Is not a comfortable setting for people like me

Q17: Please indicate how likely you are to visit each of the following attractions in the next 12 months.

Q31: Please rate how strongly you agree with the following reasons for why you have not visited The Alamo recently, if ever.

Mirroring derived barriers, something new or events may help inspire more Non-Visitors/Lapsed Visitors to consider The Alamo in the future.

Motivate/Inspire Future Visits to The Alamo

SOMETHING NEW/EVENTS – 8.1%

“A new, interactive experience.”

TIME – 7.9%

“If I learn more about it and have a lot more time off I would visit.”

FRIENDS/FAMILY – 7.7%

“Have friends or relatives that want to see it.”

Appendix

TripAdvisor Ratings

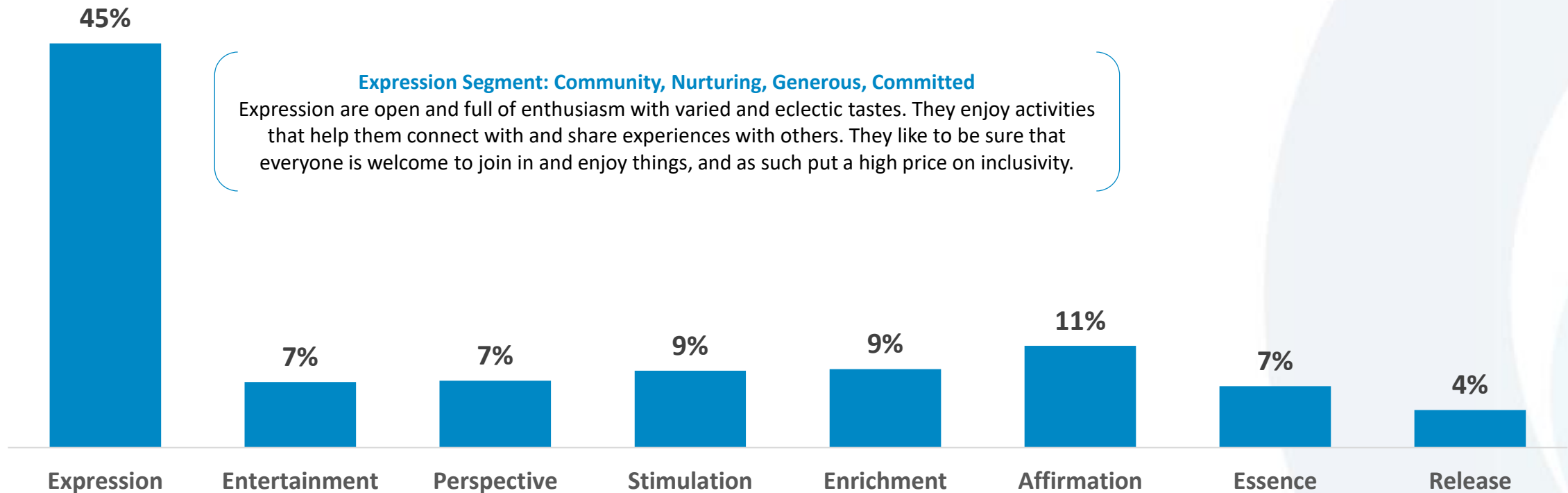
Attraction	N-size	Rank	Excellent	Very Good	Average	Poor	Terrible	T2B %	Mean
San Antonio Missions National Historic Park	1,601	4 of 280	73%	23%	2%	1%	1%	96%	4.66
San Antonio River Walk	22,050	1 of 280	67%	25%	6%	1%	1%	92%	4.56
Alamo (Historic Plaza, Church, etc.)	15,718	2 of 280	59%	28%	11%	1%	1%	87%	4.43
Hemisfair Park	143	55 of 280	34%	48%	13%	4%	1%	82%	4.10
SeaWorld San Antonio	3,924	49 of 280	47%	29%	15%	5%	4%	76%	4.10
Tower of the Americas	2,020	50 of 280	39%	36%	19%	4%	2%	75%	4.06
Six Flags Fiesta Texas	2,500	56 of 280	47%	28%	13%	5%	7%	75%	4.03
San Antonio Market Square	1,778	53 of 280	38%	34%	22%	5%	1%	72%	4.03
The Pearl	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Competitive Set	49,734	n/a	56%	31%	9%	2%	2%	87%	4.37

Those from San Antonio as well as the Hispanic prospects tend to be younger, more likely to have children and have a lower household income than the average prospect in The Alamo's target market.

	Overall	Texas Prospects	San Antonio Prospects	Feeder Market Prospects	Hispanic Prospects
Average Adult HH Age	46	46	43	48	41
Average Child HH Age	9	9	9	9	9
Household Size	3	3	4	3	4
Family Households	38%	39%	47%	28%	53%
Adult Households	62%	61%	53%	72%	47%
College Graduate +	59%	56%	49%	72%	45%
Household Income	\$88.6k	\$86.1k	\$77.7k	\$102.8k	\$72.7k

Nearly half of those surveyed fell into the Expression Segment – a significantly higher percentage than all other segments.

Segmentation



The Expression segment has the highest ratio of recent visitation to The Alamo, along with the highest opinion and highest intent to visit.

Results by MHM Segment	Overall	Expression	Affirmation	Enrichment	Stimulation	Perspective	Entertainment	Essence	Release
Aided Awareness	98%	98%	99%	98%	99%	99%	98%	98%	95%
Considered Visiting (but never have)	15%	14%	16%	11%	21%	16%	16%	20%	12%
Lapsed Visitors	42%	37%	49%	52%	42%	46%	45%	39%	41%
Recent Visitors (Past 2 Years)	36%	43%	30%	30%	29%	31%	29%	31%	31%
Positive Opinion	85%	90%	87%	84%	80%	83%	76%	80%	70%
Intent to Visit	46%	60%	39%	34%	34%	28%	28%	37%	29%
<i>Percent of Total</i>		45%	11%	9%	9%	7%	7%	7%	4%

Net Promoter Score

Net Promoter Score (NPS) is a measurement tool used across industries to evaluate net consumer satisfaction using a single point of accountability. Given the importance of social media and positive word of mouth advertising, it is mission critical that brands monitor their level of brand advocacy and the NPS is considered one of the best tools for doing so.

“How likely would you be to recommend visiting each of the following attractions to your friends and family?”



$$\text{Net Promoter Score} = (\% \text{ Who are Promoters}) - (\% \text{ Who are Detractors})$$

Thank You!



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