

## 2011 Visitor Intercept Interviews



### **Intercept Survey Methodology**

**A total of 146 surveys were completed, while a total of 120 were contracted. Thus, N=146 for the total response in this report unless otherwise noted.**

**The survey instrument (questionnaire) was printed on one sheet of 8 1/2" x 11" white paper, front and back. The survey included an incentive of a drawing for a free \$100 Visa gas card to be selected from those that responded to the survey.**

**Interviews were conducted at various locations and venues during the months of April through December 2011 and the interviewees were overnight visitors/non-Forsyth County residents. Interviews were conducted to meet the predetermined market segments.**

**The survey contained twenty-four questions. Each question is stated in the following pages in numerical sequence and the findings and responses follow each question. Observations and conclusions based on the responses are printed after each response.**

## 2011 Visitor Intercept Interviews

### Summary of Intercept Interview Findings:

- Home location for visitors to Winston-Salem: 48.95% are from North Carolina, 7.69% are from Ohio, 6.29% from Virginia, 6.29% are from South Carolina.
- 2.33 nights is the average length of stay.
- 95.38% choose to stay in a hotel.
- If on a longer trip, the final destination tends to be the Carolina coast.
- Less than 5% (1 person out of 57) chose to stay extra nights for leisure if visiting for other purposes.
- 74.65% of those interviewed have visited Winston-Salem previously. 3.85 is the average number of previous visits.
- Most travel parties (68.35%) are comprised of adults only.
- Conference/event provided info is the most prevalent information/trip planning source, followed by previous knowledge. Internet was cited by 17.81% of respondents.
- 86.11% of respondents drive to Winston-Salem. 13.89% fly-drive.
- Most prevalent activities include:
  - 84.25% Dining (near where they are staying)
  - 47.95% Shopping (Hanes Mall most popular)
  - 36.30% Attend Attraction, Museum, Historic Site, Winery
  - 18.49% Attend Sports Event/Tournament
  - 17.24% Picked up a VWS Visitor Guide
  - 9.59% Outdoor Recreation (walking, swimming, Adventure Landing)
  - 7.53% Day trip to another area (Mt. Airy, Raleigh, Concord, Greensboro, Mountains)
  - 6.16% Went to VWS Visitor Center
  - 4.11% Attend Arts Event (play, festival, concert, performance)
- Most visitors rate their overall satisfaction with Winston-Salem well. On a scale of 1-5 (1=low / 5=high), most visitors rated it either 3, 4, or 5. No one rated it either a 1 or 2. 4.31 is the overall average when looking at all categories of visitors. White collar business visitors and those on vacation tended to give the lowest ratings.
- Likes: friendly people, clean, facilities, activities, history, shopping and dining.
- Dislikes: Signage, wayfinding, traffic, ease of finding and getting to places.
- Average spending per day is \$356.85.
- Average overall ratings (scale of 1 to 5 where 1=low and 5=high):

Segment	Average Overall Rating	What's Needed to Improve Winston-Salem
Business	3.87	Better hotels and signage
Convention / Meeting	4.11	More direct air service, lodging attached to CC, walkable scale maps, visitor guides
Sports / Tournaments	4.13	Better signage to parks, more parking, porta-pottys, lower room rates
Leisure – Weekend getaway	3.81	Festivals, promotion/information
Leisure – Vacation	2.87	Recommended itineraries

- What makes Winston-Salem unique/distinct from other destinations?
  - Primary Attributes: History, Tobacco, R.J. Reynolds
  - Secondary Attributes: Wake Forest University, Arts/UNC School of the Arts, Medical

## 2011 Visitor Intercept Interviews

***Interview Locations:***

<b>Location</b>	<b>Percentage</b>
Embassy Suites	26.71%
Hampton Inn - Hanes Mall	10.96%
Holiday Inn Express - West Downtown	10.96%
Old Salem	10.27%
Hilton Garden Inn	8.90%
Hampton Inn - University	8.22%
Hawthorne Inn & Suites	8.22%
Sundance	6.85%
Reynolda House	6.16%
Courtyard by Marriott	2.74%
<b>Total</b>	<b>100.00%</b>

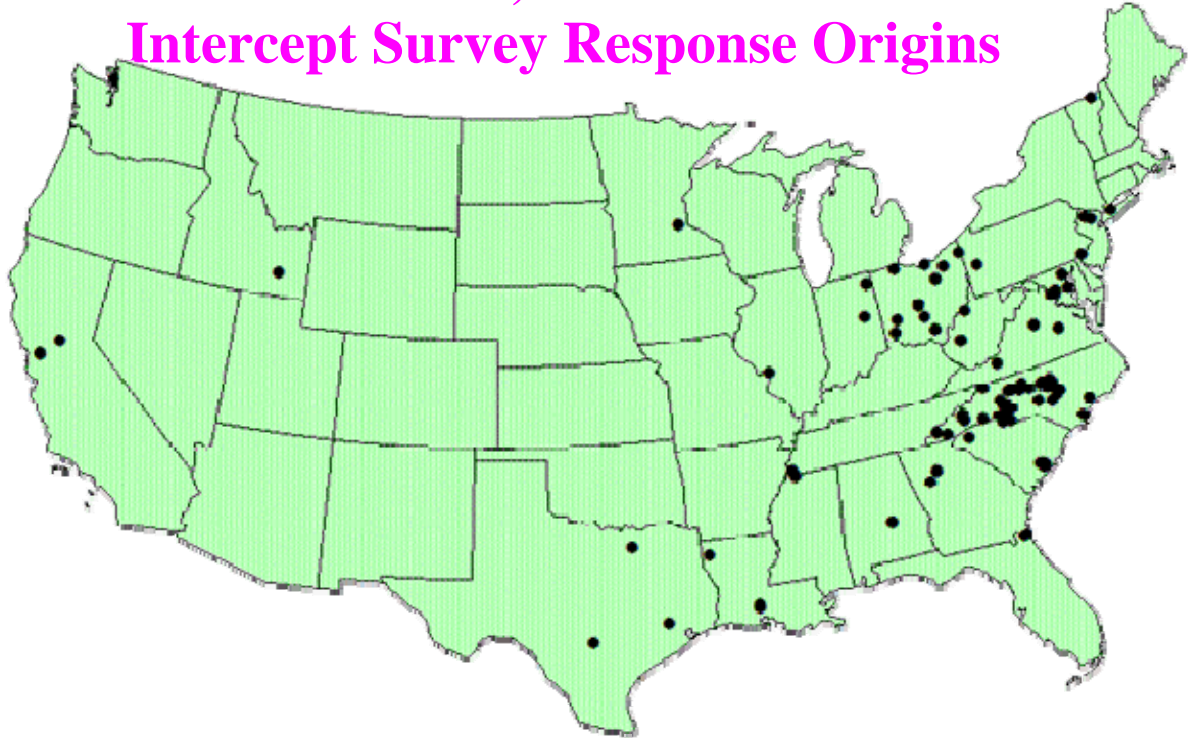
***Segments:***

<b>Segment</b>	<b>Number</b>	<b>Percentage</b>
Business (B)	22	15.07%
Group / Sports (G)	28	19.18%
<b>Leisure (L)</b>	<b>56</b>	<b>38.36%</b>
Medical (MED)	5	3.42%
Meeting / Convention (MC)	35	23.97%
<b>Grand Total</b>	<b>146</b>	<b>100.00%</b>

**2011 Visitor Intercept Interviews**

1. *What is your home zip code?*

**Winston-Salem, NC  
Intercept Survey Response Origins**



**n=140**

## 2011 Visitor Intercept Interviews

### 1. (Continued)

#### **Business**

##### **North Carolina - 6 (30.00%)**

Cary

Chapel Hill

Raleigh (4)

##### **Florida - 3 (15.00%)**

Fernandina Beach

Yulee (2)

##### **New York - 2 (10.00%)**

Long Island

Long Island City

##### **South Carolina - 2 (10.00%)**

Mount Pleasant

Rock Hill

##### **Georgia - 2 (10.00%)**

Norcross (2)

##### **Maryland - 1 (5.00%)**

Baltimore

##### **Indiana - 1 (5.00%)**

Goshen

##### **Foreign - 1 (5.00%)**

Barrie Ontario Canada

##### **Ohio - 1 (5.00%)**

Stow

##### **Minnesota - 1 (5.00%)**

Apple Valley

#### **Group**

##### **North Carolina - 23 (82.14%)**

Apex

Arden

Asheville

Cary (7)

Chapel Hill

Charlotte (2)

Dunn

Raleigh (6)

Robbinsville

Weaverville

Wilmington

##### **West Virginia - 2 (7.14%)**

Charleston (2)

##### **Virginia - 2 (7.14%)**

Oakton

Richmond

##### **South Carolina - 1 (3.57%)**

Charleston

#### **Leisure**

##### **North Carolina - 23 (41.82%)**

Advance

Archdale

Burningtown

Carthage

Cary

Chapel Hill (2)

Charlotte

Clemmons

Concord

Greensboro (2)

Henderson

Jacksonville

Jamestown

Kannapolis

Liberty

Mooreville

Raleigh

Wilmington (2)

Winston-Salem (2)

##### **Ohio - 9 (16.36%)**

Amherst

Circleville

Columbus

Jackson

Kinsman

Mason

Maumee

Wooster

Worthington

##### **Virginia - 6 (10.91%)**

Alexandria

Charlottesville

Maclean (2)

Manassas

Radford

##### **South Carolina - 4**

(7.27%)

Charleston

Easley

Fort Mill

Myrtle Beach

##### **International - 3 (5.45%)**

Casalammaggiore Italy

London Ontario Canada

Ovaryville Ontario Canada

##### **Pennsylvania - 2 (3.64%)**

Connoquenessing

Upper Chichester

##### **Indiana - 1 (1.82%)**

Auburn

##### **Idaho - 1 (1.82%)**

Pocatello

##### **New Jersey - 1 (1.82%)**

Sparta

##### **District of Columbia - 1 (1.82%)**

Washington

##### **Illinois - 1 (1.82%)**

Alton

##### **Washington - 1 (1.82%)**

Oak Harbor

##### **Georgia - 1 (1.82%)**

Fairburn

##### **Alabama - 1 (1.82%)**

Prattville

## **2011 Visitor Intercept Interviews**

### **1. (Continued)**

#### ***Medical***

##### **North Carolina - 4 (80.00%)**

Charlotte  
Forest City  
High Point  
Statesville

##### **West Virginia - 1 (20.00%)**

Saint Mary's

#### ***Meeting / Convention***

##### **North Carolina - 14 (40.00%)**

Charlotte (4)  
Fayetteville  
Four Oaks  
Gastonia  
Jacksonville  
Jefferson  
Lumberton  
Raleigh (3)  
Waxhaw

##### **Louisiana - 4 (11.43%)**

Carencro  
Lafayette (2)  
Shreveport

##### **California - 3 (8.57%)**

Concord  
Sacramento  
Walnut Creek

##### **Texas - 3 (8.57%)**

Fort Sam Houston  
Plano  
Spring

##### **South Carolina - 2 (5.71%)**

Goose Creek  
Summerville

##### **Virginia - 1 (2.86%)**

Arlington

##### **Massachusetts - 1 (2.86%)**

Chestnut Hill

##### **Ohio - 1 (2.86%)**

Dayton

##### **Mississippi - 1 (2.86%)**

Olive Branch

##### **Maryland - 1 (2.86%)**

Beverly Beach

##### **New Jersey - 1 (2.86%)**

Parsippany

##### **Vermont - 1 (2.86%)**

Morgan

##### **Tennessee - 1 (2.86%)**

Memphis

##### **Georgia - 1 (2.86%)**

Union City

## 2011 Visitor Intercept Interviews

### 1. (Continued)

#### Overall

#### North Carolina - 70

**(48.95%)**

Advance  
Apex  
Archdale  
Arden  
Asheville  
Burningtown  
Carthage  
Cary (9)  
Chapel Hill (4)  
Charlotte (8)  
Clemmons  
Concord  
Dunn  
Fayetteville  
Forest City  
Four Oaks  
Gastonia  
Greensboro (2)  
Henderson  
High Point  
Jacksonville (2)  
Jamestown  
Jefferson  
Kannapolis  
Liberty  
Lumberton  
Mooreville  
Raleigh (14)  
Robbinsville  
Statesville  
Waxhaw  
Weaverville  
Wilmington (3)  
Winston-Salem (2)  
**Ohio - 11 (7.69%)**  
Amherst  
Circleville  
Columbus  
Dayton  
Jackson  
Kinsman  
Mason

Maumee  
Stow  
Wooster  
Worthington  
**Virginia - 9 (6.29%)**  
Alexandria  
Arlington  
Charlottesville  
Maclean (2)  
Manassas  
Oakton  
Radford  
Richmond  
**South Carolina - 9 (6.29%)**  
Charleston (2)  
Easley  
Fort Mill  
Goose Creek  
Mount Pleasant  
Myrtle Beach  
Rock Hill  
Summerville  
**Georgia - 4 (2.80%)**  
Fairburn  
Norcross (2)  
Union City  
**International - 4 (2.80%)**  
Barrie Ontario Canada  
Casalamaggiore Italy  
London Ontario Canada  
Ovaryville Ontario Canada  
**Louisiana - 4 (2.80%)**  
Carencro  
Lafayette (2)  
Shreveport  
**Florida - 3 (2.10%)**  
Fernandina Beach  
Yulee (2)  
**West Virginia - 3 (2.10%)**  
Charleston (2)  
Saint Marys  
**Texas - 3 (2.10%)**  
Fort Sam Houston

Plano  
Spring  
**California - 3 (2.10%)**  
Concord  
Sacramento  
Walnut Creek  
**New York - 2 (1.40%)**  
Long Island  
Long Island City  
**Maryland - 2 (1.40%)**  
Baltimore  
Beverly Beach  
**New Jersey - 2 (1.40%)**  
Parsippany  
Sparta  
**Pennsylvania - 2 (1.40%)**  
Connoquenessing  
Upper Chichester  
**Indiana - 2 (1.40%)**  
Auburn  
Goshen  
**District of Columbia - 1 (0.70%)**  
Washington  
**Illinois - 1 (0.70%)**  
Alton  
**Washington - 1 (0.70%)**  
Oak Harbor  
**Mississippi - 1 (0.70%)**  
Olive Branch  
**Vermont - 1 (0.70%)**  
Morgan  
**Tennessee - 1 (0.70%)**  
Memphis  
**Idaho - 1 (0.70%)**  
Pocatello  
**Alabama - 1 (0.70%)**  
Prattville  
**Minnesota - 1 (0.70%)**  
Apple Valley  
**Massachusetts - 1 (0.70%)**  
Chestnut Hill

## **Visitor Survey Findings and Responses**

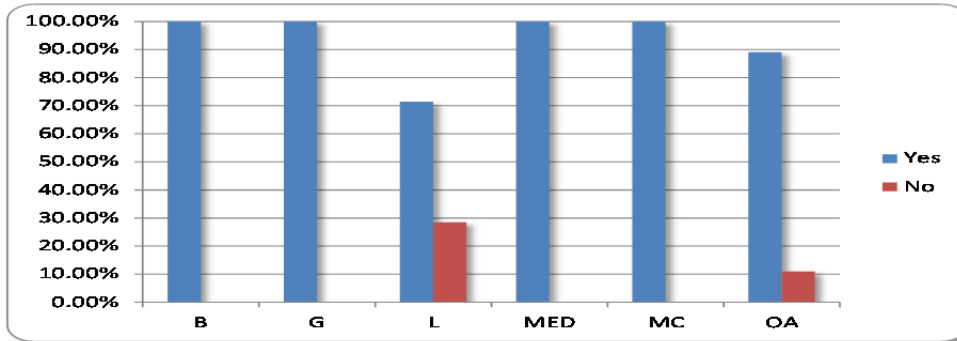
### **1. (Continued)**

Almost one-half of participants (48.95%) report that they are from the state of North Carolina. This is not surprising and RTM would predict that North Carolina market would be strong for Winston-Salem. Ohio (7.69%), Virginia (6.29%) and South Carolina (6.29%) comprise the most likely markets for Winston-Salem.



## Visitor Survey Findings and Responses

### 2. Are you overnighing in Winston-Salem?



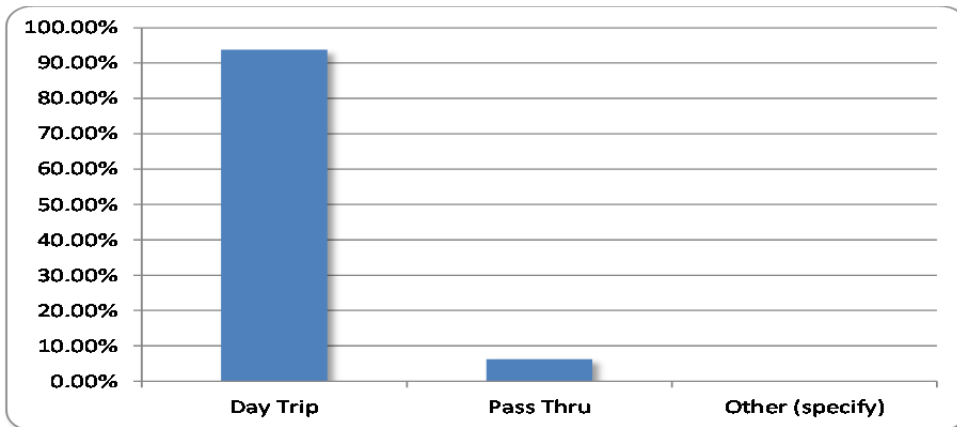
Response	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
Yes	100.00%	100.00%	71.43%	100.00%	100.00%	89.04%
No	0.00%	0.00%	28.57%	0.00%	0.00%	10.96%
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	56	5	35	146

Overall the vast majority of participants (89.04%) were overnighing in Winston-Salem.

#### 2.a. If NO, is this a daytrip or pass thru or other trip type?

*\*Note: Graph is for the Leisure segment only.*

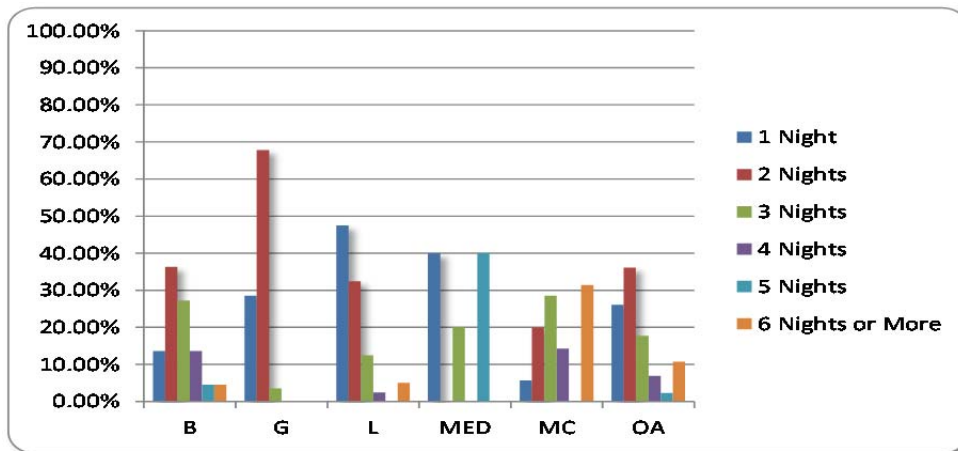
#### Trip Type for Leisure Segment Only



Trip Type	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
Day Trip	N/A	N/A	93.75%	N/A	N/A	93.75%
Pass Thru	N/A	N/A	6.25%	N/A	N/A	6.25%
Other (specify)	N/A	N/A	0.00%	N/A	N/A	0.00%
No Response =	N/A	N/A	0.00%	N/A	N/A	0.00%
Survey Sample (N) =	0	0	16	0	0	16
Question Sample (n) =	N/A	N/A	16	N/A	N/A	16

## Visitor Survey Findings and Responses

### 2.b. If YES, how many nights are you staying?



Number of Nights	Business	Group/Sports	Leisure	Medical	Meet/Conv.	Overall
1 Night	13.64%	28.57%	<b>47.50%</b>	<b>40.00%</b>	5.71%	26.15%
2 Nights	<b>36.36%</b>	<b>67.86%</b>	32.50%	0.00%	20.00%	<b>36.15%</b>
3 Nights	27.27%	3.57%	12.50%	20.00%	<b>28.57%</b>	17.69%
4 Nights	13.64%	0.00%	2.50%	0.00%	14.29%	6.92%
5 Nights	4.55%	0.00%	0.00%	<b>40.00%</b>	0.00%	2.31%
6 Nights or More	4.55%	0.00%	5.00%	0.00%	31.43%	10.77%
<b>Average # of Nights =</b>	<b>2.77</b>	<b>1.75</b>	<b>1.39</b>	<b>3.00</b>	<b>3.91</b>	<b>2.33</b>
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	40	5	35	130
Question Sample (n) =	22	28	40	5	35	130

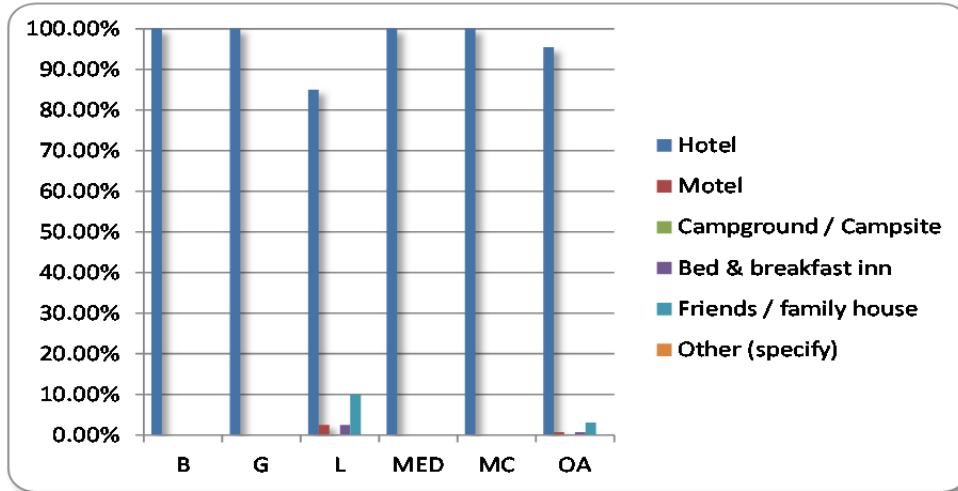
The majority of the responses to this question represented one to three night stays with the average of **2.33 nights** reported across the combined segments. The following chart is a comparison of the duration of trips by Americans in the year 2005 and the findings from the research for Winston-Salem:

Trip Durations	% of Domestic U.S. Person Trips in 2005*	Winston-Salem, NC Findings Business	Winston-Salem, NC Findings Group/Sports	Winston-Salem, NC Findings Leisure	Winston-Salem, NC Findings Medical	Winston-Salem, NC Findings Meet/Conv.	Winston-Salem, NC Findings Overall
No nights	51%	0.00%	0.00%	28.57%	0.00%	0.00%	10.96%
1-2 nights	29%	<b>50.00%</b>	<b>96.43%</b>	<b>57.14%</b>	40.00%	25.71%	<b>55.48%</b>
3-6 nights	15%	45.45%	3.57%	10.71%	<b>60.00%</b>	<b>68.57%</b>	30.14%
7 + nights	5%	4.55%	0.00%	3.57%	0.00%	5.71%	3.42%

\*Source: Travel Industry Association of America (TIA)

## Visitor Survey Findings and Responses

**2.c. If YES, what type of lodging did you select? (Circle one)**



Lodging Type	Business	Group/Sports	Leisure	Medical	Meet/Conv.	Overall
Hotel	100.00%	100.00%	85.00%	100.00%	100.00%	95.38%
Motel	0.00%	0.00%	2.50%	0.00%	0.00%	0.77%
Campground / Campsite	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Bed & breakfast inn	0.00%	0.00%	2.50%	0.00%	0.00%	0.77%
Friends / family house	0.00%	0.00%	10.00%	0.00%	0.00%	3.08%
Other (specify)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	40	5	35	130
Question Sample (n) =	22	28	40	5	35	130

**Other lodging types listed include:** No other lodging types listed for any segment.

The vast majority of all types of visitors to Winston-Salem choose to stay in hotels for their overnight stays. A distant secondary overnight choice is the home of friends/family. A small percentage choose bed and breakfast inns.

## Visitor Survey Findings and Responses

### 3. What is the major purpose of this trip to Winston-Salem? (Circle ONLY one)

*The TOP response is in bold*

Major Purpose	Business	Group/Sports	Leisure	Medical	Meet/Conv.	Overall
<b>Business</b>						
White Collar	<b>95.45%</b>	0.00%	0.00%	0.00%	0.00%	<b>14.38%</b>
Blue Collar	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
<b>Convention / Meeting</b>						
Government	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Association	4.55%	0.00%	0.00%	0.00%	34.29%	8.90%
Corporate	0.00%	0.00%	0.00%	0.00%	8.57%	2.05%
SMERF <small>(Social, Military, Educational, Religious, Fraternal)</small>	0.00%	0.00%	0.00%	0.00%	<b>57.14%</b>	13.70%
<b>Leisure</b>						
Vacation	0.00%	0.00%	1.79%	0.00%	0.00%	0.68%
Weekend Getaway	0.00%	0.00%	14.29%	0.00%	0.00%	5.48%
Visit friends / Relatives	0.00%	0.00%	25.00%	0.00%	0.00%	9.59%
Group tour / Motorcoach	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Pass through / Longer trip to ___	0.00%	0.00%	<b>26.79%</b>	0.00%	0.00%	10.27%
Daytrip	0.00%	0.00%	14.29%	0.00%	0.00%	5.48%
<b>Events / Group / Other</b>						
Event at Coliseum (specify)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sports event (specify)	0.00%	<b>75.00%</b>	0.00%	0.00%	0.00%	<b>14.38%</b>
Arts event (specify)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Other event (specify)	0.00%	25.00%	16.07%	0.00%	0.00%	10.96%
Other (specify)	0.00%	0.00%	1.79%	<b>100.00%</b>	0.00%	4.11%
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	56	5	35	146

#### **Destinations of longer trips include:**

##### **Leisure**

- **Myrtle Beach (5)**
- **Top Sail (4)**
- Atlantic
- Hilton Head
- Holden Beach
- Litchfield Beach
- Outer Banks
- Rural Retreat VA

No destinations listed for any other segment.

## **Visitor Survey Findings and Responses**

### **3. (Continued)**

#### ***Events at Coliseum include:***

No Coliseum events listed for any segment.

#### ***Sports Events include:***

##### ***Group***

- Soccer (17)
- Basketball (4)

#### ***Arts Events include:***

No arts events listed for any segment.

#### ***Other events include:***

##### ***Group***

- High School Reunion (3)
- Homecoming WFU (3)
- Wedding

##### ***Leisure***

- Modern Masters Exhibit (4)
- Choral Event (2)
- Merle Fest Music
- Oklahoma UNC School of the Arts
- Old Salem

No other events listed for any other segment.

#### ***Other trip purposes listed include:***

##### ***Leisure***

- Pass thru - visit Old Salem

##### ***Medical***

- Medical (5)

No other trip purposes listed for any other segment.

## Visitor Survey Findings and Responses

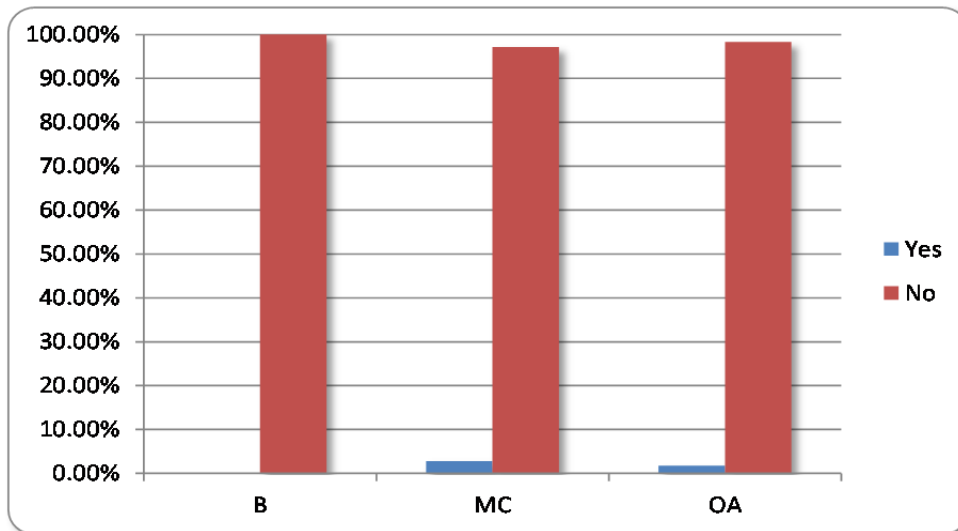
### 3. (Continued)

The primary purpose of a trip is often a key around which promotional messages can be developed.

Leisure visitors, which consists of those vacationing, visiting for a weekend getaway, visiting friends and relatives, passing through or visiting Winston-Salem for a day trip when combined is the main trip purpose for those visiting Winston-Salem followed by events/group/other, convention/meeting and business.

#### 3.a. ***If you are here primarily for business or a convention, will you stay any extra nights here for leisure?***

Business, Meeting/Convention and Overall probability of staying extra nights for leisure



Response	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
Yes	0.00%	N/A	N/A	N/A	2.86%	1.75%
<b>No</b>	<b>100.00%</b>	N/A	N/A	N/A	<b>97.14%</b>	<b>98.25%</b>
No Response =	0.00%	N/A	N/A	N/A	0.00%	0.00%
Survey Sample (N) =	22	0	0	0	35	57
Question Sample (n) =	22	N/A	N/A	N/A	35	57

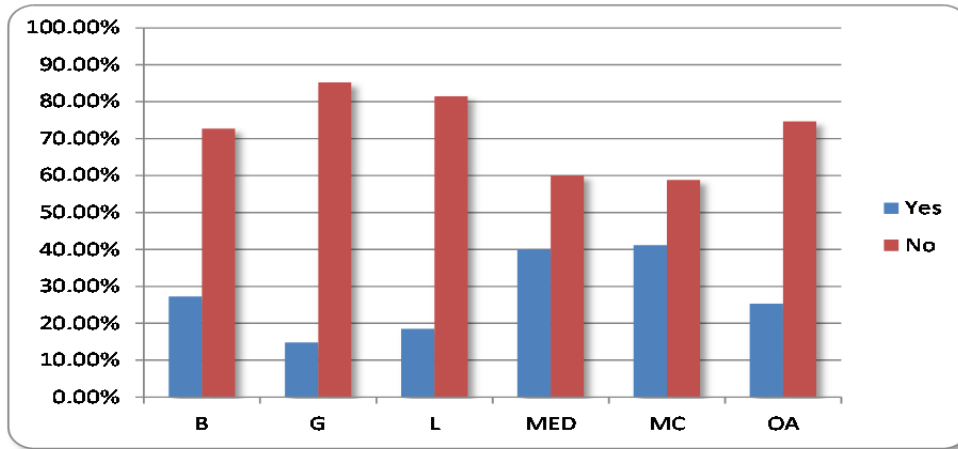
#### 3.b. ***IF YES, how many extra nights will you stay?***

*Meeting/Convention – one travel party reported plans to spend one (1) extra night for leisure activities.*

No extra nights were reported for any other segment.

## Visitor Survey Findings and Responses

### 4. *Is this your first trip to Winston-Salem?*



Response	Business	Group/Sports	Leisure	Medical	Meet/Conv.	Overall
Yes	27.27%	14.81%	18.52%	40.00%	41.18%	25.35%
No	72.73%	85.19%	81.48%	60.00%	58.82%	74.65%
No Response =	0.00%	3.57%	3.57%	0.00%	2.86%	2.74%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	27	54	5	34	142

#### 4.a. *IF NO, how many times have you visited Winston-Salem before this trip?*

Number of prior visits	Business	Group/Sports	Leisure	Medical	Meet/Conv.	Overall
1	18.75%	9.52%	17.50%	0.00%	21.05%	16.49%
2	18.75%	14.29%	5.00%	0.00%	15.79%	11.34%
3	12.50%	19.05%	15.00%	0.00%	5.26%	13.40%
4	12.50%	14.29%	7.50%	0.00%	0.00%	8.25%
5	25.00%	42.86%	52.50%	100.00%	52.63%	46.39%
More than 5	12.50%	0.00%	2.50%	0.00%	5.26%	4.12%
<b>Average Number of Times</b>	<b>4.06</b>	<b>3.67</b>	<b>3.90</b>	<b>5.00</b>	<b>3.68</b>	<b>3.85</b>
No Response =	0.00%	8.70%	9.09%	66.67%	5.00%	8.49%
Survey Sample (N) =	16	23	44	3	20	106
Question Sample (n) =	16	21	40	1	19	97

#### *Non-quantitative responses include:*

##### **Group**

- Grew up here

##### **Leisure**

- Many

Almost three-fourths of participants (74.65%) reported having visited Winston-Salem on a prior visit. The overall average number of visits is 3.85.

**Visitor Survey Findings and Responses**

**5. Including yourself, how many people are in your travel party?**

Number of Adults	Business	Group/sports	Leisure	Medical	Meet/Conv.	Overall
1	<b>90.91%</b>	29.63%	11.32%	0.00%	42.42%	34.53%
2	9.09%	<b>62.96%</b>	<b>67.92%</b>	<b>75.00%</b>	<b>51.52%</b>	<b>53.96%</b>
3	0.00%	3.70%	5.66%	0.00%	0.00%	2.88%
4	0.00%	3.70%	7.55%	0.00%	3.03%	4.32%
5 or More	0.00%	0.00%	7.55%	25.00%	3.03%	4.32%
<b>Average</b>	<b>1.09</b>	<b>1.81</b>	<b>2.36</b>	<b>3.25</b>	<b>1.73</b>	<b>1.93</b>
No Response =	0.00%	3.57%	5.36%	20.00%	5.71%	4.79%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	27	53	4	33	139

**Percentage of visitors traveling with adults only =**

- B 100.00%**
- G 22.22%**
- L 66.04%**
- MED 75.00%**
- MC 87.88%**
- OA 68.35%**

Number of Children	Business	Group/Sports	Leisure	Medical	Meet/Conv.	Overall
1	0.00%	<b>42.86%</b>	27.78%	<b>100.00%</b>	<b>50.00%</b>	<b>38.64%</b>
2	0.00%	<b>42.86%</b>	<b>33.33%</b>	0.00%	<b>50.00%</b>	<b>38.64%</b>
3	0.00%	14.29%	27.78%	0.00%	0.00%	18.18%
4	0.00%	0.00%	5.56%	0.00%	0.00%	2.27%
6	0.00%	0.00%	5.56%	0.00%	0.00%	2.27%
<b>Avg children for parties with children =</b>	<b>N/A</b>	<b>1.71</b>	<b>2.33</b>	<b>1.00</b>	<b>1.50</b>	<b>1.93</b>
<b>Average children for sample =</b>	<b>0.00</b>	<b>1.29</b>	<b>0.75</b>	<b>0.20</b>	<b>0.17</b>	<b>0.58</b>
No Response =	100.00%	22.22%	66.04%	75.00%	87.88%	68.35%
Survey Sample (N) =	22	27	53	4	33	139
Question Sample (n) =	0	21	18	1	4	44

**Percentage of visitors traveling with children =**

- B 0.00%**
- G 77.78%**
- L 33.96%**
- MED 25.00%**
- MC 12.12%**
- OA 31.65%**

**Number of Pets:**

No respondents reported traveling with pets.



## **Visitor Survey Findings and Responses**

### **5. (Continued)**

An important part of a visitor profile is the size of the group visiting an attraction or a destination.

The typical response in this study was a travel party size of 2 adults. Families traveling with children typically listed 1 or 2 children in their travel party.

Overall, 68.35% of respondents reported their travel party was comprised of only adults. 31.65% of travel parties contained children. Nationally, the Travel Industry Association of America (TIA) reports that one in five (22%) trips in the United States include children under the age of 18 so the Winston-Salem statistics exceed national travel trends. This is primarily due to the high percentage of sports groups (77.78%) in market.

## Visitor Survey Findings and Responses

### 6. *What information and trip-planning source did you use to plan this trip?* (Circle all that you used)

**Top responses in bold**

Trip-planning Source	Business	Group/Sports	Leisure	Medical	Meet/Conv.	Overall
Internet (specify)	36.36%	0.00%	<b>32.14%</b>	0.00%	0.00%	17.81%
Friends / family referral	4.55%	10.71%	30.36%	20.00%	0.00%	15.07%
Office / Work referral	<b>54.55%</b>	0.00%	0.00%	0.00%	0.00%	8.22%
Saw a brochure	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Newspaper / magazine story	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
State / regional travel guide	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
<b>Conference / event provided info.</b>	4.55%	<b>64.29%</b>	1.79%	0.00%	<b>100.00%</b>	<b>37.67%</b>
Print ad (specify)	0.00%	0.00%	5.36%	0.00%	0.00%	2.05%
Other (specify)	4.55%	17.86%	<b>32.14%</b>	<b>80.00%</b>	0.00%	19.18%
Survey Sample (N) =	22	28	56	5	35	146

Overall the most frequent trip planning source is conference/event provided followed by other, internet, friend and family, office/work and print ad.

One must look at each segment to better understand trip planning source by trip purpose. Business travelers reported their top planning source was office/work referral (54.55%), group/sports visitors top planning source was event provided information (64.29%). Leisure respondents reported internet (32.14%), other (32.14% and friends and family (30.36%) as top trip planning source. Those visiting Winston-Salem for medical purposes reported ‘other’ sources. Meeting and conference attendees reported conference/event provided information as their top trip planning source.

**“Internet” sites listed include:**

**Business**

- **Hilton (2)**
- **Holiday Inn (2)**
- **Priority (2)**
- Google

**Group**

- Tour company

**Leisure**

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• <b>Hilton (7)</b></li> <li>• <b>Hampton Inn (2)</b></li> <li>• <b>oldsalem.org (2)</b></li> <li>• <b>Reynolda (2)</b></li> </ul> | <ul style="list-style-type: none"> <li>• Hilton Head</li> <li>• Orbitz</li> <li>• Trip Advisor</li> <li>• Visit Winston</li> </ul> |
|---|--|

## Visitor Survey Findings and Responses

### **6. (Continued)**

No internet sites listed for any other segment.

#### ***“Print ads” listed include:***

##### ***Leisure***

- AAA
- Artsee
- Rand McNally

No print ads listed for any other segment.

#### ***“Other” information sources listed include:***

##### ***Business***

- Prior knowledge

##### ***Group***

- **Prior knowledge (2)**
- Call
- Knew what we wanted to do before we decided to come.

##### ***Leisure***

- **Prior knowledge (9)**
- **Phone (2)**
- AAA - phone
- Magazine Ad
- Public radio
- Small sign on Hwy 52
- Smart phone
- TV Commercial
- Walk In

##### ***Medical***

- **Hospital (2)**
- Holiday Inn sign
- Prior knowledge

##### ***Meeting / Convention***

No other information sources listed for Meeting / Convention.

## Visitor Survey Findings and Responses

### **7. How far in advance did you plan this trip to Winston-Salem? (Circle only one)**

Planning time	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
0-7 days before travel	<b>36.36%</b>	0.00%	<b>29.63%</b>	<b>40.00%</b>	2.86%	18.88%
8-14 days before travel	4.55%	7.41%	5.56%	<b>40.00%</b>	0.00%	5.59%
15-30 days before travel	9.09%	14.81%	16.67%	20.00%	0.00%	11.19%
31-60 days before travel	27.27%	18.52%	18.52%	0.00%	5.71%	16.08%
More than 60 days before travel	22.73%	<b>59.26%</b>	<b>29.63%</b>	0.00%	<b>91.43%</b>	<b>48.25%</b>
No Response =	0.00%	3.57%	3.57%	0.00%	0.00%	2.05%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	27	54	5	35	143

Overall visitors reported planning their trip 60+ days prior to traveling. Again trip purpose does determine planning time. As seen in the chart above meeting and convention attendees (97.14%) plan 31+ days in advance, group/sports visitors (92.59%) tend to plan 15 + days in advance, respondents representing the medical segment (100%) tend to plan within 30 days of travel with “spur of the moment” to 14 days being the most prevalent, business travelers tend to fall into two categories: spur of the moment to 30 days (50%) or 31 to more than 60 days (50%). 51.86% of leisure travelers plan within a 30 day timeframe while 18.52% plan with a 31-60 day window and 29.63% plan 60+ days in advance.

## Visitor Survey Findings and Responses

**8. What mode of transportation did you use to visit Winston-Salem?**  
(Circle one)

*Top response in bold*

Transportation Mode	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
<b>Automobile only</b>	<b>68.18%</b>	<b>100.00%</b>	<b>94.55%</b>	<b>100.00%</b>	<b>71.43%</b>	<b>86.11%</b>
Combination fly / drive	31.82%	0.00%	5.45%	0.00%	28.57%	13.89%
Motor coach / bus	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Motorcycle	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Other (specify)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
No Response =	0.00%	3.57%	1.79%	0.00%	0.00%	1.37%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	27	55	5	35	144

**Listed for “What airline?”**

**Business**

- Delta (3)
- US Air (2)
- Southwest
- United

**Leisure**

- American
- Delta
- US Air

**Meeting / Convention**

- Delta (3)
- Southwest (2)
- American
- Raleigh
- United
- US Air

**Listed for “Which airport?”**

**Business**

- Charlotte (3)
- Greensboro (3)
- R/D

**Leisure**

- Charlotte (2)
- Pittsburgh

**Meeting / Convention**

- Greensboro (5)
- Raleigh (3)
- Greenville
- Southwest

**Listed as other modes of transportation:**

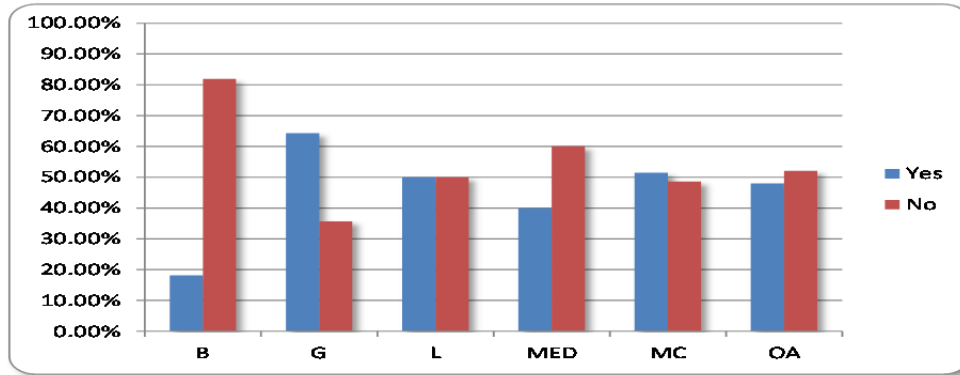
No other modes of travel listed for any segment.

RTM typically finds an average of approximately 5-15% fly/drive and 85-90% drive responses to this question for destinations similar to Winston-Salem. Overall we see that 86.11% of visitors drive to Winston-Salem in their personal automobile. Thus, the drive market is the most critical for VWS to target in its marketing efforts. Also, this makes highway gateways and highway signage for visitor information sources of critical importance to VWS.

## Visitor Survey Findings and Responses

**9. Did / will any member of your travel party participate in any of the following?**

**Shopping?**



Response	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
Yes	18.18%	64.29%	50.00%	40.00%	51.43%	47.95%
No	81.82%	35.71%	50.00%	60.00%	48.57%	52.05%
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	56	5	35	146

**If yes, Specify:**

Shopping Area	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
<b>Hanes Mall (specify)</b>	<b>75.00%</b>	<b>83.33%</b>	<b>53.57%</b>	<b>50.00%</b>	<b>38.89%</b>	<b>58.57%</b>
Downtown (specify)	0.00%	11.11%	14.29%	0.00%	72.22%	27.14%
A winery	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Thruway Shopping Center	0.00%	5.56%	7.14%	0.00%	0.00%	4.29%
Historic West End	0.00%	0.00%	3.57%	50.00%	0.00%	2.86%
Arts District	0.00%	0.00%	0.00%	0.00%	11.11%	2.86%
Reynolda Shops	0.00%	5.56%	10.71%	0.00%	0.00%	5.71%
Other (specify)	25.00%	16.67%	46.43%	0.00%	11.11%	27.14%
Survey Sample (N) =	4	18	28	2	18	70

## **Visitor Survey Findings and Responses**

### **9. Shopping (Continued)**

#### ***Hanes Mall stores listed include:***

No Hanes Mall stores listed for any segment.

#### ***Downtown shopping listed includes:***

##### ***Leisure***

- Bead Store

##### ***Meeting / Convention***

- Trade & 5th

No specific downtown shops identified for any other segment. NOTE: while some shoppers remembered they shopped “downtown” they typically could not recall the name of the individual store where they shopped.

#### ***Other shopping listed includes:***

##### ***Business***

- Apple Store

##### ***Group***

- Dick Sporting Good
- Marshalls
- Old Navy
- Old Salem
- Target

##### ***Leisure***

- CVS (2)
- Old Salem (5)
- Barnes & Noble
- Best Buy
- Dollar Store
- Golf Shops
- Strafford Road area
- Thrift Shops
- Wake Forest Book Store
- Wal-Mart

##### ***Meeting / Convention***

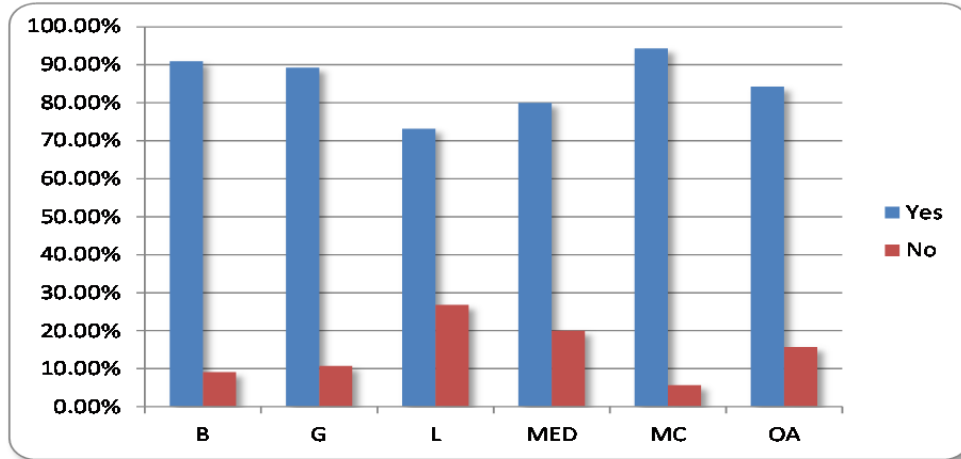
- Old Salem
- Wal-Mart

No other shopping destinations listed for the Medical segment.

## Visitor Survey Findings and Responses

### 9. (Continued)

#### Dining



Response	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
Yes	90.91%	89.29%	73.21%	80.00%	94.29%	84.25%
No	9.09%	10.71%	26.79%	20.00%	5.71%	15.75%
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	56	5	35	146

#### Specify:

##### Business

- Mi Pueblo (3)
- Village Tavern (3)
- H&H (2)
- Mellow Mushroom (2)
- Panera (2)
- Sweet Potato (2)
- Whole Foods (2)
- Bleu Restaurant
- Hospital
- Outback
- Pizza Hut
- Ryan's
- Subway

##### Group

- Macaroni Grill (6)
- Fast food (3)
- Ryan's (3)
- Village Tavern (3)
- Applebee's (2)
- Came for a class reunion Fri & Sat night meals with reunion
- Chili's
- Jimmy Johns
- Mall food court
- Not sure yet
- Outback
- Pete's Place
- Pizza
- West End



## Visitor Survey Findings and Responses

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### 9. (Continued)

#### *Dining*

##### *Leisure*

- Village Tavern (9)
- Francesco's Italian (3)
- Mellow Mushroom (3)
- Ryan's (3)
- O'Charlie's (2)
- Olive Garden (2)
- Texas Roadhouse (2)
- The Grill (2)
- Applebee's
- Bonefish
- Cagney's
- Chile's
- Downtown Thai
- El Sombrero
- Firebirds
- Hutch and Harris
- Macaroni Grill
- Marriott restaurant
- Noma
- Old Salem Snack Bar
- Pizza delivery
- Room Service
- Simply Yummy
- Subway
- Sweet Potatoes
- Ten-O-One
- Therapy
- Whole foods

##### *Medical*

No dining establishments listed for the Medical segment.

##### *Meeting / Convention*

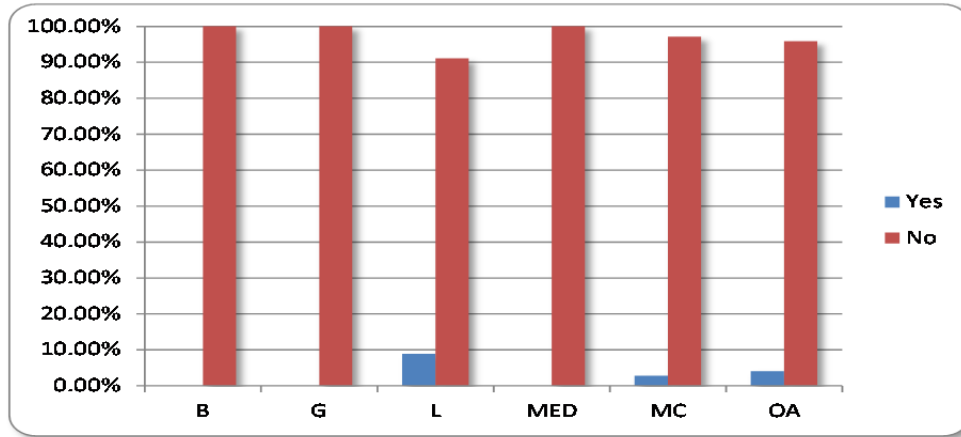
- Sweet Potato (6)
- Jimmy Johns (5)
- Buena Pinta (3)
- Cities conf. provided some meals (3)
- Finnegan's Wake (3)
- Mellow Mushroom (3)
- The Garage (3)
- Brew Nerd (2)
- Hutch and Harris (2)
- King's Crab (2)
- Starbucks (2)
- Subway (2)
- Bernardin's
- Downtown Thai
- Lucky Blue
- Sixth & Vine
- Texas Roadhouse
- The Grill
- Tokyo Shapiro

**NOTE: Dining appears to match where visitors are staying more than any other choice factor.**

## Visitor Survey Findings and Responses

### 9. (Continued)

#### Arts Event (play, concert, performance)



Response	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
Yes	0.00%	0.00%	8.93%	0.00%	2.86%	4.11%
No	100.00%	100.00%	91.07%	100.00%	97.14%	95.89%
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	56	5	35	146

#### Specify:

##### Leisure

- Choral Event (2)
- Merle Fest (2)
- Oklahoma

##### Meeting / Convention

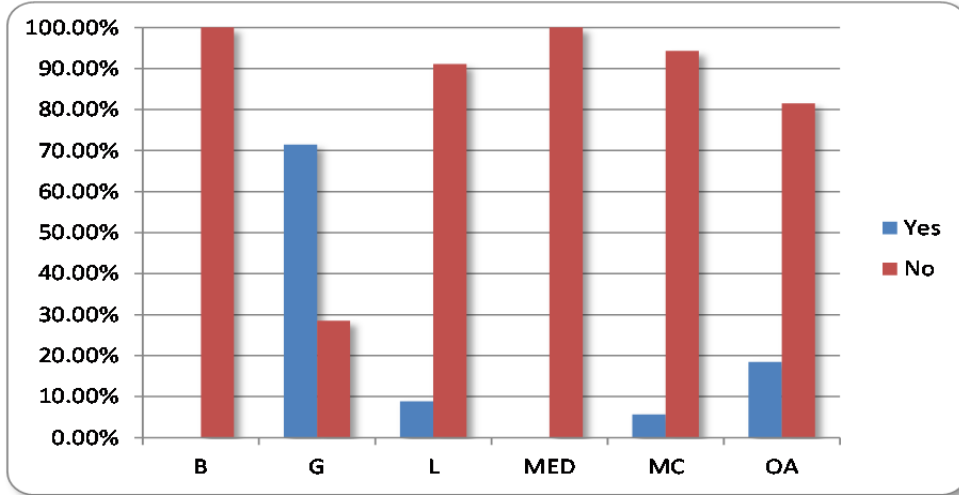
- Art walk

No arts events listed for any other segment.

## Visitor Survey Findings and Responses

### 9. (Continued)

#### Sports event or tournament



Response	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
Yes	0.00%	<b>71.43%</b>	8.93%	0.00%	5.71%	18.49%
No	<b>100.00%</b>	28.57%	<b>91.07%</b>	<b>100.00%</b>	<b>94.29%</b>	<b>81.51%</b>
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	56	5	35	146

#### **Specify:**

##### **Group**

- Soccer (12)
- Basketball YWCA (4)
- WFU Game (4)
- Hine Park

##### **Leisure**

- WF Game (4)

##### **Meeting / Convention**

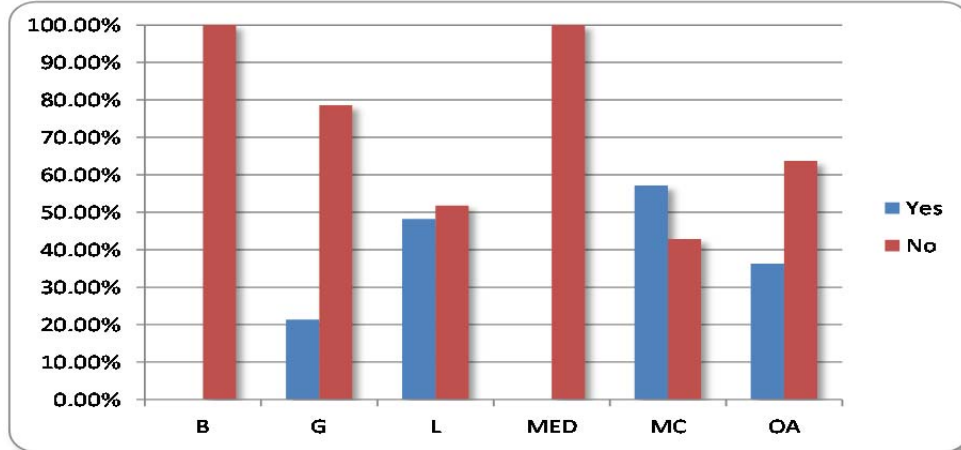
- Baseball Game (2)

No sports events listed for the Business or Medical segments.

## Visitor Survey Findings and Responses

### 9. (Continued)

#### Attraction, Museum, Historic Site, winery



Response	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
Yes	0.00%	21.43%	48.21%	0.00%	<b>57.14%</b>	36.30%
No	<b>100.00%</b>	<b>78.57%</b>	<b>51.79%</b>	<b>100.00%</b>	42.86%	<b>63.70%</b>
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	56	5	35	146

#### **Specify:**

##### **Group**

- Wake Forest University (3)
- Old Salem

##### **Leisure**

- Old Salem (18)
- Reynolda (13)
- Wake Forest (2)
- SciWorks
- SECCA
- Strollway

## **Visitor Survey Findings and Responses**

### **9. (Continued)**

#### ***Meeting / Convention***

- **Old Salem (10)**
- **Winston Cup Museum (7)**
- **Reynolda (4)**
- **Aperture Theatre (3)**
- **Bethabara (2)**
- Farmers Market
- Foothills Brewing
- Library
- Noma's
- RayLen Winery
- Tanglewood
- Wineries
- Tour of Winston-Salem

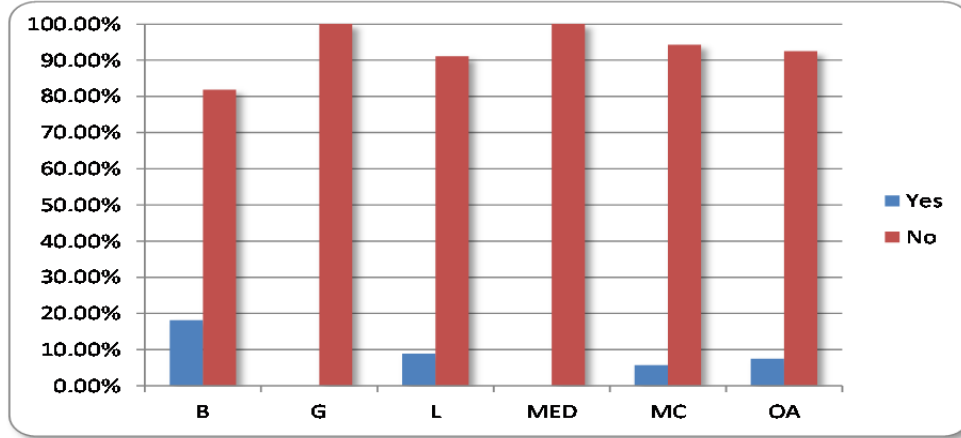
No attractions, museums, historic sites or wineries were listed for the Business or Medical segments.

Overall more than one-third of visitors (36.30%) interviewed reported visiting an attraction, museum, historic site or winery; specifically meeting and conventions attendees, leisure and those attending a group/sporting event.

## Visitor Survey Findings and Responses

### 9. (Continued)

#### Day trip to another area



Response	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
Yes	18.18%	0.00%	8.93%	0.00%	5.71%	7.53%
No	81.82%	100.00%	91.07%	100.00%	94.29%	92.47%
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	56	5	35	146

#### Specify:

##### Business

- Concord (2)
- Asheville
- Blue Ridge Parkway
- Mt. Airy

##### Leisure

- Mt. Airy (2)
- Raleigh (2)
- Boone
- Greensboro

##### Meeting / Convention

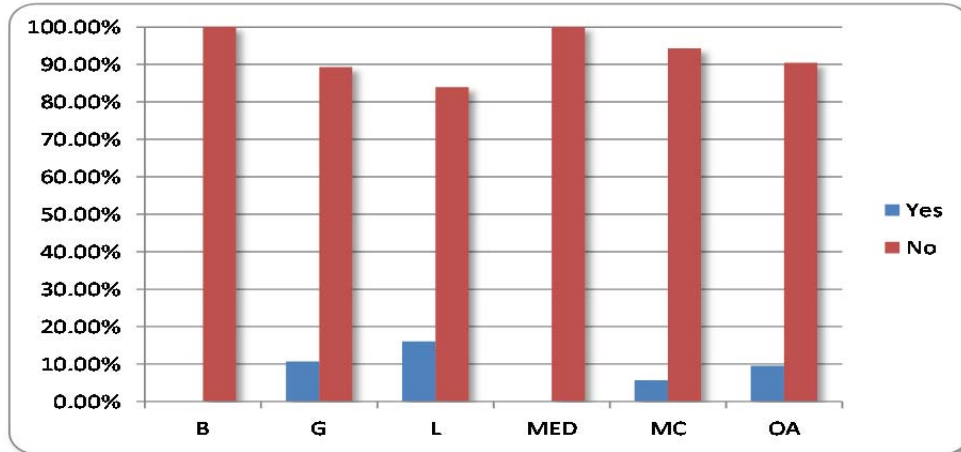
- Greensboro Battlefield
- Mt. Airy to visit family
- Raleigh

No day trip locations were listed for the Group or Medical segments.

## Visitor Survey Findings and Responses

### 9. (Continued)

#### Outdoor Recreation



Response	Business	Group/Sports	Leisure	Medical	Meet/Conv.	Overall
Yes	0.00%	10.71%	16.07%	0.00%	5.71%	9.59%
No	100.00%	89.29%	83.93%	100.00%	94.29%	90.41%
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	56	5	35	146

#### Specify:

##### Group

- Adventure Landing (3)

##### Leisure

- Mini Golf (3)
- Walking (2)
- Adventure Landing
- Hanging Rock
- Reynolda Garden at the Village
- Swimming

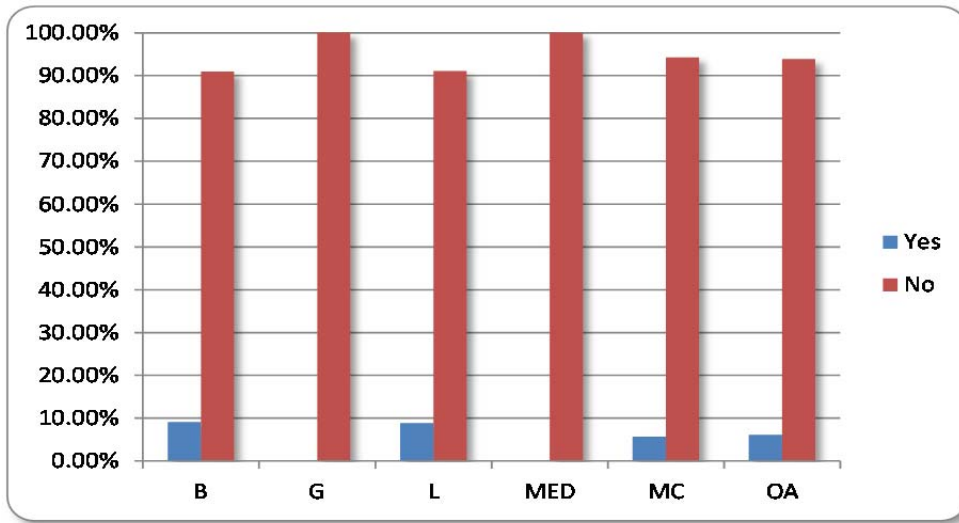
##### Meeting / Convention

- Swimming (2)

No outdoor recreation activities listed for the Business or Medical segments.

## Visitor Survey Findings and Responses

**10. Did you stop at the Winston-Salem visitor center during this trip?**

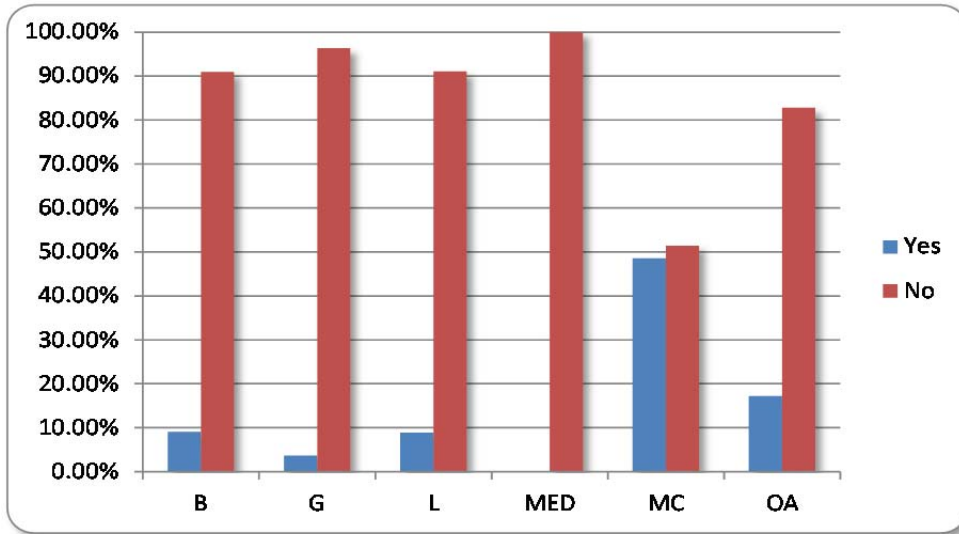


Response	Business	Group/ Sports	Leisure	Meeting	Meet/Conv.	Overall
Yes	9.09%	0.00%	8.93%	0.00%	5.71%	6.16%
<b>No</b>	<b>90.91%</b>	<b>100.00%</b>	<b>91.07%</b>	<b>100.00%</b>	<b>94.29%</b>	<b>93.84%</b>
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	56	5	35	146



## Visitor Survey Findings and Responses

**11. Have you picked up and/or used a Winston-Salem visitor guide during this trip?**



Response	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
Yes	9.09%	3.70%	8.93%	0.00%	48.57%	17.24%
<b>No</b>	<b>90.91%</b>	<b>96.30%</b>	<b>91.07%</b>	<b>100.00%</b>	<b>51.43%</b>	<b>82.76%</b>
No Response =	0.00%	3.57%	0.00%	0.00%	0.00%	0.68%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	27	56	5	35	145

## Visitor Survey Findings and Responses

- 12. Overall, on a 5-point scale (where 5 is Excellent, 3 is Average, and 1 is Poor), how would you rate this visit to Winston-Salem, NC?**  
*(Circle ONE number)*

Rating	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
5 (Excellent)	13.64%	<b>46.43%</b>	<b>52.73%</b>	<b>50.00%</b>	<b>60.00%</b>	<b>47.22%</b>
4	<b>50.00%</b>	35.71%	40.00%	0.00%	25.71%	36.11%
3 (Average)	36.36%	17.86%	7.27%	<b>50.00%</b>	14.29%	16.67%
2	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
1 (Poor)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
<b>Average Rating</b>	<b>3.77</b>	<b>4.29</b>	<b>4.45</b>	<b>4.00</b>	<b>4.46</b>	<b>4.31</b>
No Response	0.00%	0.00%	1.79%	20.00%	0.00%	1.37%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	55	4	35	144

The rating of a visit to an attraction or a destination by visitors is useful in understanding if visitor expectations are being met by actual experiences. Further, it provides a clue to likelihood of return/repeat visits in the future. It is also a good measure of how well visitors will speak of Winston-Salem to their friends and relatives.

It is important for Visit Winston-Salem to realize that typically a visitor rates their vacation experiences highly. Vacations, perhaps even in foul weather or less-than-desirable conditions are still appreciated by visitors compared to their normal hectic lives. The worst day of one's vacation is for many still better than his/her best day at work. RTM typically sees average ratings in the range of 4.2 to 4.4 and has only rarely seen an average rating below a 4.0. Therefore, one must look very critically at the ratings provided here.

RTM prefers to see a solid "A" (or upwards of a 4.5) rating for destinations. Ratings over this mark confirm for us that the destination is providing excellent value and is well positioned with expectations matching actual experiences. Visit Winston-Salem's overall average rating of **4.31** is very good and can be improved upon.

## Visitor Survey Findings and Responses

### 12. (Continued)

A cross tabulation of the data produced the following table that shows the visitor rating for the total visit experience to Winston-Salem by the type of trip taken, the gender of the respondent and by the major purpose for the visit to the area.

<u>Category</u>	<b>Average Rating</b>	<b>Average Rating</b>	<b>Average Rating</b>	<b>Average Rating</b>	<b>Average Rating</b>	<b>Average Rating</b>
<u>Gender</u>	<b>Business</b>	<b>Group/Sports</b>	<b>Leisure</b>	<b>Medical</b>	<b>Meet/Conv.</b>	<b>Overall</b>
Men	3.75	4.00	4.24	<b>5.00</b>	4.44	4.14
Women	<b>3.83</b>	<b>4.47</b>	<b>4.63</b>	3.67	<b>4.47</b>	<b>4.45</b>
<u>Main Purpose for Visit</u>						
White Collar business	3.71	N/A	N/A	N/A	N/A	3.71
Blue Collar business	N/A	N/A	N/A	N/A	N/A	N/A
Government conv. / meet	N/A	N/A	N/A	N/A	N/A	N/A
Association conv. / meet	<b>5.00</b>	N/A	N/A	N/A	3.92	4.00
Corporate conv. / meet	N/A	N/A	N/A	N/A	<b>5.00</b>	<b>5.00</b>
SMERF conv. / meet	N/A	N/A	N/A	N/A	4.70	4.70
Vacation	N/A	N/A	3.00	N/A	N/A	3.00
Weekend Getaway	N/A	N/A	<b>4.75</b>	N/A	N/A	4.75
Visit friends / Relatives	N/A	N/A	4.57	N/A	N/A	4.57
Group tour / Motorcoach	N/A	N/A	N/A	N/A	N/A	N/A
Pass through / Longer trip	N/A	N/A	4.27	N/A	N/A	4.27
Daytrip	N/A	N/A	4.38	N/A	N/A	4.38
Event at Coliseum	N/A	N/A	N/A	N/A	N/A	N/A
Sports event	N/A	4.10	N/A	N/A	N/A	4.10
Arts event	N/A	N/A	N/A	N/A	N/A	N/A
Other event	N/A	<b>4.86</b>	4.56	N/A	N/A	4.69
Other purpose	N/A	N/A	NR	<b>4.00</b>	N/A	4.00

## Visitor Survey Findings and Responses

### **13. What did you like or dislike the most about your visit to Winston-Salem? (Write in your answers)**

#### Top Reported Likes

##### **Business**

- **Architecture of homes (2)**
- **Friendly people (2)**
- **Medical community (2)**
- **Restaurants (2)**
- **Walkable scale (2)**
- Activity variety
- Clean
- Downtown
- Everything!
- History
- Minor League Baseball team
- Nice
- Potential business
- Safe
- Scenery
- Size of city
- Small city charm

##### **Group**

- **Wake Forest University (4)**
- **Convenience (3)**
- **Family / friends (3)**
- **Great recreation fields (2)**
- Clean
- Diverse
- Downtown
- Easy to navigate
- Everything
- Friendly people
- Good community
- Property easy to work with
- Proximity to State Parks
- Restaurants
- Scenic
- Visiting old high school

## Visitor Survey Findings and Responses

### **13. (Continued)**

#### ***Leisure***

- **Friendly people (7)**
- **Activities variety (6)**
- **History (6)**
- **Old Salem (5)**
- **Scenery (4)**
- **Arts (3)**
- **Family / friends (3)**
- **Good stopping location (3)**
- **Restaurants (3)**
- **Safe (3)**
- **Clean (2)**
- **Cultural events (2)**
- **Hotel (2)**
- **Location (2)**
- **Reynolda House (2)**
- Ambience
- Attractions are "well" done
- Bakery
- Bars
- Campus development
- Changes that have taken place
- Convenient
- Dining
- Downtown is walkable
- Downtown shopping
- Good day trip
- Good stays
- Great handicap access
- Great mall!
- Hometown
- Homey
- UNCSA
- Neighborhood setting within city
- Night life
- No traffic
- Old homes
- Outside venues
- Proximity
- Quaint
- Reynolda website is fantastic
- Shopping
- Small town charm
- Trade St, 4th St
- Upgraded highway system
- Weather
- WFU

#### ***Medical***

- Architecture
- Ballpark
- Easy to navigate
- Medical facilities
- Shopping
- Variety of things to often

#### ***Meeting / Convention***

- **Friendly people (6)**
- **Walkable (4)**
- **Nice city (3)**
- **Small town (3)**
- **Convention site (2)**
- **Downtown (2)**
- **Hotel (2)**
- **Restaurants (2)**
- Artsy downtown
- Bicycle Police Patrol
- Charm
- City old feel
- Clean
- Convenience
- Everything!
- Family / friends here
- Improvement of downtown
- Noma Restaurant
- Proximity to dining
- Proximity to shopping
- Shopping - Hanes Mall
- Specialty shopping
- Tri - Ad rest. website
- Variety of things

## Visitor Survey Findings and Responses

### 13. *(Continued)*

#### Top Reported Dislikes

##### ***Business***

- Humidity
- Need more selection of lodging
- One Way streets
- Streets do not make sense

##### ***Leisure***

- **One way streets (2)**
- Could not find visitor information
- Disappointed in hotel
- Distance from home
- Downtown seems dead
- Exit at WSSU still closed!
- Exit ramps
- Had to use yellow pages to find visitor information
- I-40 - Business Traffic
- Need healthier breakfast
- Neighbor's around Old Salem are not favorable
- No signage from B-40 to Old Salem
- Not enough signage
- Prices of hotels in Winston-Salem higher than Greensboro, so we had to stay in Greensboro
- Strollway needs security
- Strollway not welcoming
- The branches was covering road signs traveling from Old Salem

##### ***Medical***

- Parking downtown

##### ***Meeting / Convention***

- Choices of restaurants
- Crazy drivers
- I-40 is an issue!
- No drug store within walking distance to lodging
- Some coffee shops closed on Saturdays

Knowledge of the characteristics or attributes which visitors liked and disliked about their visit is useful information in assessing product quality, to provide to local tourism entities for corrective measures and for developing new promotional messages.

Clearly, the selection of restaurants, variety of activities, history and the friendly people appeal to visitors. The dislikes primarily included one way streets, signage and Interstate 40 issues.

14. ***Following is a list of amenities offered in Winston-Salem. Considering this visit, please rate each amenity on a 5-point scale (where 5 is Excellent, 3 is average and 1 is Poor). (Circle ONE rating for each)***

## Visitor Survey Findings and Responses

Amenity	Average Business	Average Group/Sports	Average Leisure	Average Medical	Average Meet/Conv.	Average Overall
Quality & variety of lodging	3.88	4.14	4.30	<b>5.00</b>	4.23	4.18
Lodging value you received for the price paid	4.00	3.70	4.21	3.50	4.15	4.02
Range of choices for dining	4.00	4.30	4.11	4.25	4.00	4.11
Selection of shopping	3.80	4.29	4.18	4.67	4.05	4.16
Signage and wayfinding	3.17	3.89	3.82	<b>5.00</b>	3.90	3.79
Ease of finding visitor information prior to arrival	3.67	4.13	3.92	NR	<b>4.42</b>	4.11
Ease of finding visitor information once here	3.50	4.17	3.70	<b>5.00</b>	4.31	4.06
Level of service / employee training	4.24	4.39	4.45	4.25	4.40	<b>4.39</b>
Overall quality of attractions	<b>4.40</b>	<b>4.40</b>	<b>4.48</b>	<b>5.00</b>	3.92	4.36

RTM prefers to find ratings here to be over 4.00 or a good, solid “B” rating, ratings of 4.50 or higher can be considered excellent. Similarly, RTM finds that ratings below 4.00 tend to show areas that need improvement. Ratings below 3.00 are considered unacceptable

Overall the Visit Winston-Salem amenities rated good with only *signage and way finding* dipping below the critical 4.0 level.

## Visitor Survey Findings and Responses

### 15. *Approximately how much did / will you spend PER DAY while on this trip in Winston-Salem?*

Average daily spending per travel party:

Category	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
Lodging	\$97.71	\$112.04	\$118.19	\$109.00	\$125.71	\$114.48
Foods/meals	\$45.05	\$80.56	\$59.28	\$47.20	\$43.47	\$57.19
Attractions/entertainment	\$0.00	\$24.00	\$26.89	\$0.00	\$27.27	\$26.60
Events / tournaments	\$0.00	\$75.00	\$41.25	\$0.00	\$0.00	\$58.13
Shopping	\$45.00	\$42.27	\$39.76	\$32.50	\$40.19	\$40.47
Transportation	\$82.50	\$21.00	\$34.05	\$20.00	\$40.77	\$42.48
Other	\$0.00	\$17.50	\$0.00	\$0.00	\$0.00	\$17.50
<b>Average Daily Expense</b>	<b>\$270.26</b>	<b>\$372.37</b>	<b>\$319.42</b>	<b>\$208.70</b>	<b>\$277.41</b>	<b>\$356.85</b>
<b>Average Length of Stay</b>	<b>2.77</b>	<b>1.75</b>	<b>1.39</b>	<b>3.00</b>	<b>3.91</b>	<b>2.33</b>
<b>Total Trip Expenditures</b>	<b>\$748.62</b>	<b>\$651.65</b>	<b>\$443.99</b>	<b>\$626.10</b>	<b>\$1,084.67</b>	<b>\$831.46</b>

Average spending as percentages of total expenditures:

Category	Business	Group/Sports	Leisure	Medical	Meet/Conv.	Overall
Lodging	36.15%	30.09%	37.00%	52.23%	45.32%	32.08%
Foods/meals	16.67%	21.63%	18.56%	22.62%	15.67%	16.03%
Attractions/entertainment	0.00%	6.45%	8.42%	0.00%	9.83%	7.45%
Events / tournaments	0.00%	20.14%	12.91%	0.00%	0.00%	16.29%
Shopping	16.65%	11.35%	12.45%	15.57%	14.49%	11.34%
Transportation	30.53%	5.64%	10.66%	9.58%	14.70%	11.90%
Other	0.00%	4.70%	0.00%	0.00%	0.00%	4.90%
<b>Total</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>

Overall, the largest daily expense for travelers to Winston-Salem is lodging (32.08%). The second highest expense is events/tournaments (16.29%) followed by food/meals (16.03%), transportation (11.90%), shopping (11.34%), attractions/entertainment (7.45%) and “other”, which include items purchased as events including sports memorabilia, t-shirts etc. (4.90%).

Shopping is identified nationally as the number one tourist activity. As seen in question Q9, 47.95% of respondents indicated that they shopped while visiting Winston-Salem. We also see in Question 9 that 84.25% of respondents reported dining as an activity. Shopping is the second most popular tourist activity for visitors to Winston-Salem after dining. This makes shopping the most popular discretionary activity since dining is a necessity for most travelers. When we do find shopping to be the largest expenditure, we can be sure that the destination is taking maximum advantage of economic impact opportunities. Shopping is a contributor to economic impact from travel for Winston-Salem. The findings here also reinforce the importance for Visit Winston-Salem in promoting shopping to those visiting Winston-Salem.



## Visitor Survey Findings and Responses

**16. How would you rate Winston-Salem as a destination for the following: (5=Excellent, 3=Average, 1=Poor)**

Activity	Average Business	Average Group/Sports	Average Leisure	Average Medical	Average Meet/Conv.	Average Overall
Business	3.70	3.73	3.79	5.00	4.13	3.87
Convention / Meeting	3.64	3.79	4.08	5.00	4.38	4.11
Sports / Tournaments	3.50	4.31	4.15	5.00	4.00	4.13
Leisure – Weekend getaway	3.33	3.83	4.09	5.00	3.33	3.81
Leisure – Vacation	2.50	3.00	3.00	4.00	2.60	2.87

Activity	Don't Know Business	Don't Know Group/sports	Don't Know Leisure	Don't Know Medical	Don't Know Meet/Conv.	Don't Know Overall
Business	2	15	37	3	12	69
Convention / Meeting	11	12	39	3	1	66
Sports / Tournaments	14	1	38	4	23	80
Leisure – Weekend getaway	10	8	18	2	13	51
Leisure – Vacation	14	17	37	2	18	88

***What would improve Winston-Salem for business visitors?***

***Business***

- Better hotels and signage

***Meeting / Convention***

- More direct air service

No business traveler recommendations submitted by any other segment.

***What would improve Winston-Salem for convention / meeting visitors?***

***Meeting / Convention***

- Have lodging attached to convention center
- Visitor guides
- Walkable scale map

No meeting / convention traveler recommendations submitted by any other segment.

## Visitor Survey Findings and Responses

### **16. (Continued)**

#### ***What would improve Winston-Salem for sports / tournaments visitors?***

##### ***Group***

- **Better signage getting to parks (3)**
- **More parking (2)**
- Better discount on room rates
- Field signs
- Info on kid activities
- Porta-Johns

No sports / tournament visitor recommendations submitted by any other segment.

#### ***What would improve Winston-Salem for leisure (weekend getaway) visitors?***

##### ***Group***

- Festivals

##### ***Leisure***

- Daytrip information
- Discounts or camp services for active duty military
- Promoting Arts & Culture - Girls Arts & Cultural Event

##### ***Medical***

- Kid friendly activities
- Provide information on outdoor recreation, music venues

##### ***Meeting / Convention***

- Major attraction needed.

No leisure (weekend getaway) recommendations submitted by the business segment.

#### ***What would improve Winston-Salem for leisure (vacation) visitors?***

##### ***Group***

- Daytrips information
- Planned itinerary

No leisure (vacation) recommendations submitted by any other segment.

## Visitor Survey Findings and Responses

**17. What type of activities, facilities or experiences would you participate in if offered in Winston-Salem, NC?**

*(Circle the number of ALL that interest you)*

*The top responses are in bold*

Activity, facility, or experience	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
<b>City walking tour</b>	<b>63.64%</b>	<b>57.14%</b>	<b>69.64%</b>	<b>60.00%</b>	<b>68.57%</b>	<b>65.75%</b>
<b>Trail of arts &amp; crafts studios and shopping</b>	<b>40.91%</b>	<b>53.57%</b>	<b>62.50%</b>	<b>80.00%</b>	<b>48.57%</b>	<b>54.79%</b>
Other activity, facility, or experience (specify)	9.09%	7.14%	16.07%	0.00%	14.29%	12.33%
Survey Sample (N) =	22	28	56	5	35	146

**Visitor Survey Findings and Responses**

**18. How well does the following match your perceptions of Winston-Salem?**

***“The City of Arts & Innovation”***

<b>Rating</b>	<b>Business</b>	<b>Group/Sports</b>	<b>Leisure</b>	<b>Medical</b>	<b>Meet/Conv.</b>	<b>Overall</b>
5 (High)	0.00%	3.57%	12.50%	<b>20.00%</b>	5.71%	7.53%
4	13.64%	14.29%	17.86%	<b>20.00%</b>	14.29%	15.75%
3 (Average)	22.73%	<b>39.29%</b>	21.43%	<b>20.00%</b>	<b>34.29%</b>	<b>28.08%</b>
2	22.73%	3.57%	0.00%	0.00%	2.86%	4.79%
1 (Low)	<b>31.82%</b>	17.86%	17.86%	<b>20.00%</b>	8.57%	17.81%
Don't Know	9.09%	21.43%	<b>30.36%</b>	<b>20.00%</b>	<b>34.29%</b>	26.03%
No Response	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	56	5	35	146

Only 23.28% indicated that this statement matched their perceptions of Winston-Salem (ratings at or above 4.00). The largest percentage (28.08%) rated the statement a 3.00 as matching their perceptions. 43.84% rated it a 1.00 (low) or “Don’t Know”. In deeper discussions, it appears that the “innovation” portion of the statement is particularly disconcerting regarding these respondents perceptions of Winston-Salem. Those that identified with “innovation” were likely to relate it to medical. Those that identified “arts” tended to relate to the School of the Arts.

## Visitor Survey Findings and Responses

### **19. What makes Winston-Salem distinct / different from other destinations?**

#### ***Business***

- **History (5)**
- **Tobacco (4)**
- **Easy to navigate (2)**
- **No idea (2)**
- Culture
- Downtown size
- Home for me!
- Location
- Minor League Baseball
- Walkable scale of downtown
- WFU

#### ***Group***

- **History (6)**
- **Tobacco (6)**
- **Old Salem (3)**
- **Wake Forest (3)**
- **Soccer (2)**
- **Arts & Culture (2)**
- Central location
- Diversity
- Education
- Sports
- The name - Winston-Salem
- Unsure

#### ***Leisure***

- **History (15)**
- **Tobacco / Cigarettes / RJ Reynolds (11)**
- **Old Salem (9)**
- **Wake Forest (6)**
- **Arts (4)**
- **Medical, Medical School (3)**
- **Culture (2)**
- **Downtown area (2)**
- **School of Arts (2)**
- Baptist Hospital
- Central location
- Near mountains
- No idea
- Quaintness of community
- Reynolda
- The name, Winston-Salem
- University City
- Variety of activities

#### ***Medical***

- Demographics
- Large city
- Mixes downtown with uptown feel
- Old Salem
- Variety

## Visitor Survey Findings and Responses

### **19. (Continued)**

#### ***Meeting / Convention***

- **History (8)**
- **Tobacco / RJ Reynolds (6)**
- **Old Salem (2)**
- **WFU (2)**
- Baptist Hospital
- Innovation
- Nightlife
- Patrolling

The attributes that define and distinguish Winston-Salem include:

#### **Primary Attributes:**

- History
- Tobacco, R. J. Reynolds
- Old Salem

#### **Secondary Attributes:**

- Wake Forest University
- Arts / UNC School of the Arts / Culture
- Medical

## Visitor Survey Findings and Responses

### Demographics

Demographics are the descriptive statistics dealing with a specific population of people. The demographics of visitors are excellent descriptions of the target markets that are visiting an attraction or destination. The demographics of the sample of respondents who visited Winston-Salem are described in the following information.

#### **20. What is your age?**

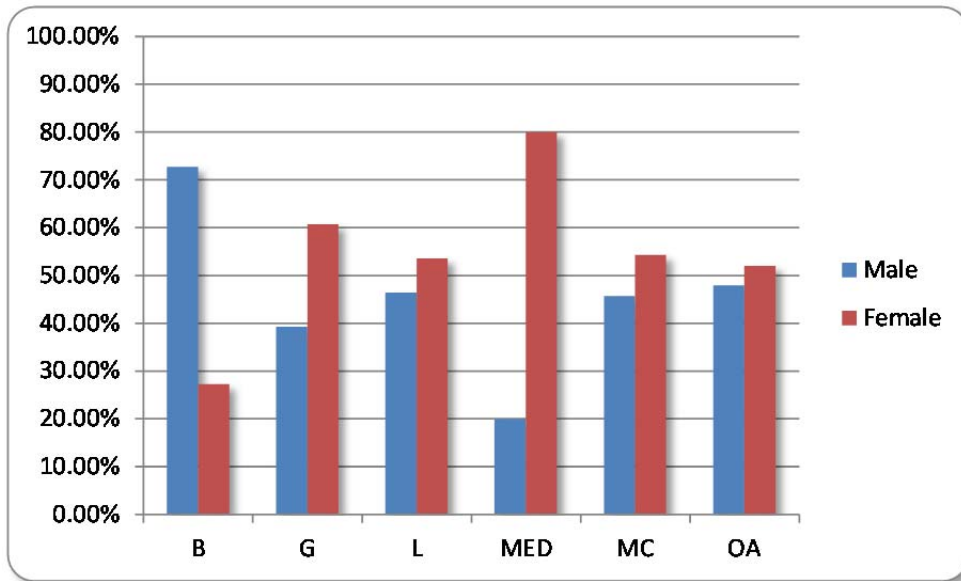
Ages range from:	B	27 to 61.	Average = 41.50.
	G	32 to 79.	Average = 46.68.
	L	21 to 85.	Average = 53.14.
	MED	24 to 67.	Average = 38.60
	MC	23 to 76.	Average = 48.35.
	OA	21 to 85.	Average = 48.50.

Overall the average age of respondents is **48.50** years. This also matches data for other similar areas. Tabulating the survey response data by generational group produces the following table:

<b><u>Generational Group</u></b>	<b>Age Range</b>	<b>___%___ B</b>	<b>___%___ G/S</b>	<b>___%___ L</b>	<b>___%___ M</b>	<b>___%___ MC</b>	<b>___%___ OA</b>
Millennium Generation	9-27	4.55%	0.00%	1.79%	20.00%	14.71%	5.52%
Generation X	28-48	<b>68.18%</b>	<b>64.29%</b>	26.79%	<b>60.00%</b>	<b>32.35%</b>	<b>42.76%</b>
Baby Boomer	49-66	27.27%	28.57%	<b>62.50%</b>	0.00%	<b>32.35%</b>	41.38%
Silent Generation	67-84	0.00%	7.14%	7.14%	20.00%	20.59%	9.66%
War Generation	85+	0.00%	0.00%	1.79%	0.00%	0.00%	0.69%

## Visitor Survey Findings and Responses

### 21. Are you?



Gender	Business	Group/Sports	Leisure	Medical	Meet/Conv.	Overall
Male	<b>72.73%</b>	39.29%	46.43%	20.00%	45.71%	47.95%
Female	27.27%	<b>60.71%</b>	<b>53.57%</b>	<b>80.00%</b>	<b>54.29%</b>	<b>52.05%</b>
No Response =	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	28	56	5	35	146

Overall slightly more than one-half of respondents (52.05%) of respondents were female. Typically RTM finds more female trip planning decision-makers than male.



## Visitor Survey Findings and Responses

### **22. Occupation?**

#### ***Business***

- **Sales (10)**
- **Physician (2)**
- **Clinical ED Specialist (2)**
- Contractor
- Emergency Planning
- Engineer
- Financial Advisor
- Manager
- Relocation Specialist - Business Owner
- Traveling RN

#### ***Group***

- **Educator (4)**
- **Homemaker (4)**
- **Finance (2)**
- **Pharmacist (2)**
- **Retired (2)**
- **Sales (2)**
- Cafeteria Worker
- Consultant
- CPA
- Dietician
- Engineer
- Manager
- Physician
- President / Manufacturing
- Retail Furniture
- RN
- Soccer Coach

#### ***Leisure***

- **Retired (10)**
- **Homemaker (8)**
- **Educator (5)**
- **Engineer (5)**
- **Manager / Supervisor (5)**
- **Physician (2)**
- Aerospace Program Manager
- Aircraft Mechanic
- Attorney
- Business Owner
- Director
- Domestic Technologists
- Executive
- Instructor
- IT
- Massage Therapist
- Non Profit
- Program Director
- RN
- Sales
- Student
- Surgery Technician
- Tech Engineer
- Tool Maker
- Unemployed

## **Visitor Survey Findings and Responses**

### **22. (Continued)**

#### ***Medical***

- Admin Assistant
- Homemaker
- Retired
- Unemployed
- Victims Advocate

#### ***Meeting / Convention***

- **Retired (11)**
- **Educator (5)**
- **RN / Nurse (5)**
- **Homemaker (2)**
- **Medical Assistant (2)**
- **Self Employed (2)**
- Advocate
- Army Officer
- Legislative Assistant
- Occupational Therapist
- Officer
- Physician
- Student

Professional occupations and retired are the most numerous responses. The data reported here matches what we find for other similar areas and corresponds with the relatively high education level as seen in question 23.

## Visitor Survey Findings and Responses

### 23. *Education?* (Circle one)

Educational Level	Business	Group/ Sports	Leisure	Medical	Meet/Conv.	Overall
Grade school	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Technical school	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Some high school	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
High school graduate	0.00%	3.85%	5.36%	<b>60.00%</b>	9.38%	7.09%
Some college	13.64%	0.00%	16.07%	0.00%	15.63%	12.06%
College degree	<b>77.27%</b>	<b>73.08%</b>	<b>57.14%</b>	40.00%	<b>56.25%</b>	<b>62.41%</b>
Graduate school	9.09%	23.08%	21.43%	0.00%	18.75%	18.44%
Other (specify)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
No Response =	0.00%	7.14%	0.00%	0.00%	8.57%	3.42%
Survey Sample (N) =	22	28	56	5	35	146
Question Sample (n) =	22	26	56	5	32	141

**Listed as “other”:**

No other educational levels listed for any segment.

Overall the largest percentage of respondents reported having a college degree (62.41%), or having completed graduate school (18.44%) followed by those who had attended some college (12.06%). In general, the respondents were well educated and better educated than the general United States population, which is typical of the traveling public.