

2015-2016 Visitor Intercept Survey

Overview

Winston-Salem Convention & Visitors Bureau retained Randall Travel Marketing of Mooresville, NC to conduct a Visitor Intercept Survey. The study was conducted between August 2015 and April 2016.

This survey was part of an overall study that included two parts:

1. 2015-2016 Visitor Intercept Survey
2. 2016 Visitor Inquiry Conversion & Marketing Perception Survey

It is important to note that the primary difference between the two studies is that the 2015-2016 Visitor Intercept Survey was conducted to determine perceptions and behaviors by visitor segment including Business, Convention/Meeting, Leisure, and Group. The 2016 Visitor Inquiry Conversion & Marketing Perception Survey was designed to capture the perceptions of those who made inquiries to Winston-Salem CVB, and generally is more of a leisure visitor perspective as that is the bulk of inquiries received by Winston-Salem CVB.

Visitor Intercept Survey Methodology

A total of 160 Intercept Surveys were completed by visitors to Winston-Salem. Thus N=160 for the total response in this report stands unless otherwise noted, while a small “n” indicates number of respondents answering a specific question (not all respondents answered every question). A random selection of visitors were chosen to match the overall visitor base, by type of visitor (segment), as well as by time of year and day of week. Thus, the sample population that completed the surveys matches the overall target population determined by Randall Travel Marketing and Winston-Salem Convention & Visitors Bureau. The survey instrument (questionnaire) was printed on two pages of 8-1/2” x 11” white paper, front-to-back. The survey included an incentive drawing for a free \$100 Visa Gas card to be selected via random drawing from respondents. Interviews were conducted between August 2015 and April 2016 at locations throughout Winston-Salem at various times of day and days of the week.

Segmentation Breakdown (reference question 3 on survey)

The following numbers and percentages define segmentation results for this study.

Response Population Totals By Segment	Business	Convention Meeting	Leisure	Group
Responses	32	31	75	22
Percentages	20.0%	19.4%	46.9%	13.7%

N=160

Study Population Segments

Survey respondents self-identified into four significant groups and twelve sub-groups:

Business: (1) white collar and blue collar.

Convention/Meeting: Subgroups (2) corporate, (3) government, (4) SMERF (social, military, education, religious, fraternal meeting groups), and (5) association.

Leisure: Subgroups (6) vacation, (7) weekend getaway, (8) visit friends/relatives, (9) group tour/motorcoach, (10) pass thru part of vacation/longer trip.

Group: Subgroup (11) Sports (participant or spectator), (12) other Events (participant or spectator).

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Summary of Intercept Interview Findings:

- Home location for visitors to Winston-Salem: 35% are from North Carolina, 8% are from South Carolina, 5% from Virginia, and approximately 15% come via the I-40 corridor.
- 3.00 nights is the average length of stay.
- 94.1% choose to stay in a hotel.
- Approximately 5% chose to stay extra nights for leisure if visiting for other purposes.
- 70.7% of those interviewed have visited Winston-Salem previously. 3.70 is the average number of previous visits.
- The significant majority of travel parties (90.3%) are comprised of adults only.
- Family/friends referral was cited as the most prevalent information/trip planning source, followed by conference/Group provided information and office/work referral. Internet was cited by 14.9% of respondents.
- 73% of respondents drive to Winston-Salem. 21.7% fly-drive.
- Most prevalent activities include:
 - 82.9% Dining (non-chain restaurants dominate)
 - 40.7% Shopping (Hanes Mall most popular)
 - 37.1% Visit an Attraction, Museum, Historic Site, Winery
 - 15.7% Visit Hanes Mall
 - 10.20% Picked up a VWS Visitor Guide
 - 4.3% Outdoor Recreation (walking/jogging, hiking most popular)
 - 9.3% Day trip to another area (Greensboro, Mountains, Asheboro)
 - 5.0% Attend Arts Group (play, concert, performance)
 - 6.4% Visit Arts District
 - 7.9% Visit Reynolda Shops
- 34.9% of visitors use Social Media during their trips, with Facebook dominating (76.5%).
- Most visitors rate their overall satisfaction with Winston-Salem quite well. On a scale of 1-5 (1=low / 5=high), all visitor categories rated it over a 4.19, with the overall average at 4.29.
- Likes: friendly people, amenities, and the historic/quaint/charming atmosphere of Downtown.
- Dislikes: Signage, wayfinding, traffic, ease of finding and getting to places; Service issues; Panhandlers/safety
- Average spending per day is \$376.24.

Future Activities, Facilities, or Experiences	Business	Convention Meeting	Leisure	Group	Overall
City walking tour	62.5%	64.5%	49.3%	59.1%	62.9%
Culinary food	68.8%	83.0%	60.0%	36.4%	69.9%
Trail of arts & crafts studios and shopping	37.5%	48.4%	29.3%	18.2%	36.4%

- **Visitors report that what makes Winston-Salem distinct/unique is its “history-charm-quaint-artsy-Downtown-restaurant-atmospheric” vibe. They think of Winston-Salem as more similar to Asheville than bigger cities like Greensboro-Raleigh-Charlotte. It is seen as big enough to have good amenities, but small enough to have retained a hometown/charming feel. That is the essence that Winston-Salem needs to protect and preserve. It’s a great positioning and can serve Winston-Salem well for decades to come!**