

Winston-Salem Visitor Profile & Perception Research Executive Summary of Findings January 2019

Purpose/Objective:

The overall objective of the two research studies conducted for Visit Winston-Salem was to develop a comprehensive profile of the overnight visitor to the destination and were aimed at determining perceptions and behaviors and crossed referenced by the respondents demographic profile. Past studies conducted by Randall Travel Marketing provided baseline metrics, some of which are re-evaluated here.

Methodology:

The following methods were utilized to gather visitor information:

- **E-mail Survey:** Inquiry Perception & Image Study
 - August 2018
- **Visitor Intercept Interviews:** Visitor Profile & Perception Study
 - August – November 2018

- *It is important to note that the primary difference between the two studies is that the **E-Mail 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.*

- *The 2018 Visitor **Intercept Interviews** were **in-market** interviews with overnight visitors and conducted to determine perceptions and behaviors by **market segment** including Business, Convention/Meeting, Leisure, and Sports Events/Group.*

Below are the overall results specific to each study:

2018 E-Mail Survey: Inquiry Perception & Image Study

An e-survey of Visit Winston-Salem's e-mail database subscribers from the last two years was conducted August 13-27, 2018.

- *Approximately 28,000 email invitations
2,528 responses (9% response rate) **
 - * Locals (those living within a 50-mile radius of Winston-Salem) are not included in analysis*

- **The CVB's inquiry database of consumers interested in Winston-Salem visitor information is very strong and consists mostly of non-local leisure visitors.**
 - 83% of the consumers receiving visitor information are from outside a 50-mile radius; 17% are locals*
 - 70% of the non-local visitors have visited Winston-Salem in the past, while 30% have not.
 - This is consistent with previous research of repeat travel at 69% of visitors.
 - The majority of visitors drove their own vehicles (95 %) while 3% was by air.
 - Nearly 80% live in North Carolina. While 12% live in either Virginia, South Carolina, Georgia, and/or Florida.
 - 79% of these consumers travel more than twice per year for leisure. The majority averages 2-3 annual leisure trips.

- Demographics*:
 - 73% are female
 - 57% are Boomers, 23% are Gen X, 10% are Gen Y and 9% are the Great Generation*
 - 61% live in an urban/suburban area
 - 69% have a college degree or higher
- *Gen Y (ages 22-37), Gen X (ages 35-52), Boomer (53-72), Great (73+)

- **When preparing for a leisure trip, 74% of travelers use visitor information websites and 67% use referrals from family/friends. 46% use TripAdvisor, and another 46% use visitor guides.**

- Gen X and Y travelers are more likely to use friends/family referral, Google/internet search, and social media than other generations.
- Boomers and The Great Generation are more likely to use prior knowledge, visitwinstonsalem.com, and the Winston-Salem Visitors Guide.

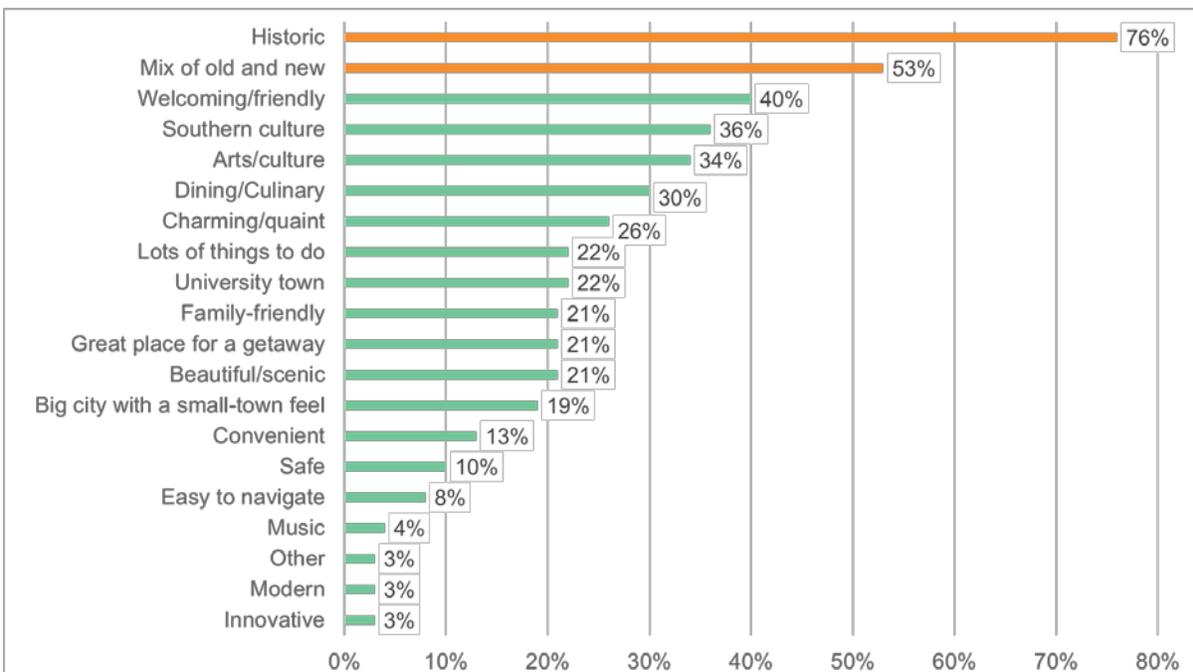
- **Unaided Perception:**

When asked what leisure travelers think of Winston-Salem, they offered the following most often: History, Old Salem, Wake Forest, tobacco/cigarettes, and Moravian history/cookies.

- **Aided Perception:**

When asked to choose the top six (6) phrases that best describe Winston-Salem, 76% selected Historic, 53% selected Mix of Old and New, 40% selected Welcoming/Friendly, 36% selected Southern Culture, 34% selected Arts/Culture and 30 % dining/culinary.

Top 6 phrases that best describe Winston-Salem (aided perception, all leisure travelers):



- **Nearly half of respondents visited Winston-Salem more than 5 times (48%); only 10% were first time visitors; 44% had visited within the last six months.**
 - 23% had visited within the last year;
 - 70% stayed in a hotel or motel while 18% stayed with friends or family.
 - 46% of visitors traveled for leisure/getaway and another 11% traveled to visit friends and relatives; 8% traveled to Winston-Salem for business.

- **Visitor Activities:** Dining (87%) and shopping (66%) are the most popular activities. 36% of visitors visited attractions and museums. Arts events (15%), breweries (12%), and outdoor recreation (12%) were also strong activities. The chart below highlights the highest response for visitor activities cross-referenced by demographic age group:

	Gen Y	Gen X	Boomers	Great
Dining	84%	85%	87%	87%
Shopping	56%	65%	69%	63%
Visited attractions/museums	31%	31%	35%	40%
Arts Event (play, concert, performance, etc.)	14%	14%	16%	18%
Visited a brewery	30%	16%	12%	7%
Outdoor recreation	9%	15%	11%	4%
Day trip outside Winston-Salem	10%	9%	12%	9%
Festival/Event	8%	10%	10%	9%
Visited a winery	11%	6%	7%	3%

- **83% of visitors rated their most recent visit to Winston-Salem a 4 (above average) or 5 (excellent) on a 5-point scale, with an average rating of 4.22.**
 - Visitors rated highly the quality and variety of lodging (4.12), the range of choices for dining (4.17), and the overall quality of attractions (4.10) in Winston-Salem.
 - Visitors also rated signage and wayfinding (3.77), lodging value (3.89), and feeling of safety and security downtown (3.90).

Intercept Interviews: Visitor Profile & Profile Study

Researchers from Gray Research Solutions traveled to Winston-Salem six times in the summer and fall (August – November 2018) and conducted one-on-one Intercept interviews with 164 overnight visitors at the following locations:

- *Hotels: Doubletree, Embassy Suites, Hampton Inn Hanes Mall, Hawthorne Inn and Conference Center, Holiday Inn Express, Marriott Downtown and the Historic Brookstown Inn.*
- *Attractions: Reynolda House Museum of American Art and Old Salem Visitor Center.*

- **Primary Purpose of Travel:**

Response totals by segment	Overall	Business	Convention/ Meeting	Leisure	Group
Includes:	All visitor respondents	White collar and blue collar	Corporate, government, SMERF, Association	Vacation, getaway, VFR, family events, motorcoach, pass thru, other	Sports, other group
Responses 2018	164	38	34	68	24
Percentages 2018	100%	23.5%	21.0%	41.5%	14.8%

- **Travel Profile & Demographics**

- 36% of visitors interviewed traveled from North Carolina; 9% traveled from Georgia, 6% came from Maryland, 5% originated from Florida, 4% each from Texas, Virginia and Illinois and 6% international visitors.
- Visitors in 2018 were slightly younger and more educated on average than the 2016 Intercept Survey.
 - Boomers continue to comprise the largest number of overall visitors. However, the number of GenXers interviewed increased from 22% in 2016 to 33% in 2018.
 - Business travelers were younger on average (46.8) while Group travelers were older on average (53).

Demographics:		
	2015-2016	2018
Average Age	51	48.8
Gender: Male / Female	28%/66%	39%/61%
Point of Origin	NC, SC, VA, GA	NC, GA, MD, FL
Generations:		
Gen Z (16-21)	0%	3%
Gen Y (22-39)	24%	21%
Gen X (40-51)	22%	33%
Boomer (52-70)	46%	42%
Silent/Great (71-80)	7%	3%
Travel Party Size:		
Adults only	90%	89%
Average # of Adults	2.1	1.71
Visitors traveling with children	10%	11%
Average # of children	2.0	1.29
Education:		
Technical school	0%	1%
Some high school	0%	1%
High school graduate	5%	4%
Some college	17%	11%
College degree	63%	61%
Graduate school	15%	21%

- **Overnight Stays**
 - 99% of visitors interviewed stayed overnight.
 - 97% stayed in a hotel while 3% stayed with friends and family.
 - On average overnight stays across all market segments was 2.61 nights; with Business travelers staying longer at an average of 4.38 nights. Leisure visitors stayed an average of 1.86 nights.
- **Nearly three out of four visitors interviewed (72%) had been to Winston-Salem before.**
 - Half (49%) had been at least five times previously.
 - Group visitors were most likely to be on their first trip (46%).
 - Business visitors were most likely to have been five or more times previously (65%).
- **The internet/website is the strongest trip planning source of information for travelers.**
 - Conference attendees use event-provided information (77%) and business travelers use company-provided information (74%).
 - Leisure visitors utilize the internet most strongly (65%) as well as friends/family referrals (46%).
- **On average, the visitors are planning further out than they were in 2016. Overall, 31% averaged more than 31-60 days and an equal percentage began trip planning more than 60 days prior.**
 - When cross-referenced by market segment, Business travelers had the shortest planning time (44% planned 15-30 days out) while Leisure visitors had the longest planning time (40% planned more than 60 days out).

- **Overall, approximately 6 out of 10 visitors drove their own cars while about 3 out of 10 flew into an area airport and drive a rental car.**
 - Business travelers were the most likely to fly/drive (37%) while visitors attending a convention/meeting had the highest percentage of drive only (74%).
- **Trip Activities**
 - Top trip activities were dining (86%), shopping (42%), attending a sports event or tournament (27%), and visiting an attraction, museum historic site or winery (21%).
 - Visitor attendance of arts events was 11%.
- **Overall visitors are satisfied with their visits; especially with lodging, service, dining, and shopping.**
 - Overall, visitors in 2018 rated their trips a 4.31 on a 5-point scale; slightly higher than 2016 (4.29). As was then, they rate the level of service highest (4.41 in 2018).
 - 2018 saw increased ratings for lodging quality/variety (3.99 vs 3.88 in 2016), dining (4.19 up from 3.9), and shopping (4.12, up from 3.84).
 - Overall experience ratings cross-referenced by market segment were: Business travelers 4.08, a 4.44 for convention/meeting travelers, a 4.18 for group/sports events, and a 3.57 for leisure visitors on a weekend getaway.
 - 55% of visitors said they were extremely likely to return to Winston-Salem (5 on a 5-point scale). Another 33% said they were likely to return (4 on a 5-point scale).
- **Visitors highly ranked the downtown vibe and the people, but not the construction and traffic.**
 - Likes included downtown walkability, comfortable feel, amenities/things to do, history/culture, arts, and quaint.
 - Dislikes included traffic/congestion, lack of wayfinding/signage, parking and panhandling downtown, and lack of nightlife (including open restaurants).

Overall Insights and Implications

- ***Visitor activities and perceptions are consistent with previous survey results.***
 - Winston-Salem continues to be perceived as historic, charming/quaint, lively and artsy.
 - It is appreciated for its size (big city amenities with small town charm that feels like home), and the historic aspect alongside newer developments and amenities.
- ***Downtown is increasingly being seen as a hip & historic location.***
 - New restaurants and shops alongside historic buildings are being noticed and appreciated by visitors.
 - Visitors chose “mix of old and new” (53%) as the second strongest descriptor after historic (76%). (E-mail Study)
 - Things to do such as dining, shopping and breweries were the three most popular activities visitors liked during their visit(s). (Intercept Interview)

- The trip planning window has increased to more than 30-60 days.
- Overall in terms of a leisure, visitors define Winston-Salem as a “getaway” vs. “vacation” and parents visiting a child in college/university was prevalent.
- Internet/Websites are the “go-to” sources for visitors to plan their leisure trip.
- **Visitors don’t always know what there is to see and do, even if they think they do.**
 - *With an average length of stay for 4.38 nights for business travelers and 2.61 for meeting visitors, there is an increased opportunity to communicate/market “things to do and places to visit” during their stay; possibly extend their stay or encourage a return leisure trip/getaway*