VISITOR RESEARCH

August, 2019
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METHODOLOGY

The Fredericksburg CVB commissioned Core Research to determine the impact of visitors to the Gillespie County area. Three surveys were conducted during June-July 2019:

• **Personal interviews**
  Six professionals conducted 10-minute interviews with 480 visitors at 11 locations:
  – Main Street, Wildseed, 2 Wineries, Museum, Brewery, Enchanted Rock, LBJ Park, 2 peach stands and Luckenbach.
  – $5 voucher incentive at Clear River

• **Web survey**
  An invitation was sent via email to the entire CVB list, which produced 1,482 responses.

• **Mobile text survey**
  48 respondents provided demographic information.
VISITOR PROFILE

- Demographics
- Residence
- Frequency
- Length of Stay
- Lodging Choices
- Spending Plans
# DEMOGRAPHICS

<table>
<thead>
<tr>
<th>Total N</th>
<th>2,010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>%</td>
</tr>
<tr>
<td>Female</td>
<td>65</td>
</tr>
<tr>
<td>Male</td>
<td>35</td>
</tr>
<tr>
<td>Age group</td>
<td></td>
</tr>
<tr>
<td>Under 35</td>
<td>20</td>
</tr>
<tr>
<td>35 - 49</td>
<td>27</td>
</tr>
<tr>
<td>50 – 59</td>
<td>22</td>
</tr>
<tr>
<td>60+</td>
<td>31</td>
</tr>
</tbody>
</table>

## Occupation

<table>
<thead>
<tr>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working</td>
</tr>
<tr>
<td>Retired</td>
</tr>
<tr>
<td>Self employed</td>
</tr>
</tbody>
</table>

## HH Income

<table>
<thead>
<tr>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>under $60K</td>
</tr>
<tr>
<td>$60-$100K</td>
</tr>
<tr>
<td>$100-$150K</td>
</tr>
<tr>
<td>$150K +</td>
</tr>
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</table>

*Online survey and visitor interviews*
VISITOR RESIDENCE

Online survey and visitor interviews  N=2,010
VISIT FREQUENCY

Online survey and visitor interviews  N=2,010
DESTINATION & PLANNING

Advance planning:
- Less than week: 21%
- 1-2 weeks: 18%
- About a month: 23%
- More than a month: 34%
- Not sure: 3%

Online survey and visitor interviews  N=2,010
Online survey and visitor interviews  N=2,010
LENGTH OF STAY
BY INTERVIEW DAY OF WEEK

Weekday
- Day trip: 44%
- Overnight: 56%

Weekend
- Day trip: 34%
- Overnight: 66%
LODGING CHOICES

- Hotel, motel: 49%
- Guesthouse, B&B: 38%
- RV park, camp: 9%
- Friends: 3%

Online survey and visitor interviews  N=2,010
SPENDING PLANS
Overnight vs. Day Trip

All visitors
$540.00

Day Trip
$174.00

Overnight
$751.00

Online survey and visitor interviews  N=2,010
SPENDING PLANS
Length of Stay

<table>
<thead>
<tr>
<th>Length of Stay</th>
<th>Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>under 2 hrs</td>
<td>$91.00</td>
</tr>
<tr>
<td>2-8 hours</td>
<td>$184.00</td>
</tr>
<tr>
<td>1 night</td>
<td>$430.00</td>
</tr>
<tr>
<td>2 nights</td>
<td>$640.00</td>
</tr>
<tr>
<td>3 nights</td>
<td>$1,071.00</td>
</tr>
<tr>
<td>4+ nights</td>
<td>$1,014.00</td>
</tr>
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</table>

Online survey and visitor interviews  N=2,010
OPINIONS ABOUT FREDERICKSBURG

• Favorite Season
• Top Reasons to Visit
• Overall Evaluation
• Suggestions for Improvement
VISITORS’ FAVORITE SEASON

Online survey and visitor interviews  N=2,010, multiple response allowed

Note: surveys conducted during summer
TOP REASONS TO VISIT

- Family vacation: 45%
- Romantic getaway: 23%
- Visiting fam/friends: 10%
- Biz/conf: 4%
- Wedding related: 2%

Online survey and visitor interviews  N=2,010
TRACKING EVALUATION of Fredericksburg Experience

Overall Evaluation: Exceeds Expectations

- **2019**: 69%
- **2013**: 52%
- **2008**: 48%
- **2004**: 48%
TOP ACTIVITIES

- Dining: 82%
- Shopping: 74%
- Museums: 44%
- Wineries: 42%
- Wildflowers: 27%
- Live Music: 26%
- Peaches: 27%
- Antiquing: 17%
- Craft breweries: 19%
- Enchanted Rock: 19%
- Festival/event: 12%

Online survey and visitor interviews  N=2,010
TOP SUGGESTIONS

None! All is great
Parking, traffic, transportation
Longer hours
Improve retail
Improve lodging
Improve restaurants
Prices too high
Maintain German heritage, authenticity
Better marketing, maps, online
More events, entertainment
Too crowded
Weather
Special interests (kids, natural)
Need more restrooms, benches, sidewalks
Wine, beer issues
Improve hospitality

N = 1,373 suggestions

Not shown: 3% misc. (free coupons, contests) and 4% don’t know, haven’t visited

Online survey and visitor interviews N=2,010
Overall, visitors to Fredericksburg give us high marks. When we asked for recommendations, 32% said that everything was fine, and had no recommendations. However, these were the primary themes for the remaining 68% responses:

- **Parking, traffic**
  
  *I drive a big truck, so it's kinda precarious driving around. If they could reroute trucks, that would be ideal. There are so many people and traffic in town.*

  *More parking. I don't know where, but it is so crowded, and older people have a hard time walking to the shops, when they have to park blocks away.*

- **Hours open**
  
  *Don't roll up sidewalks at 6pm during week. Chamber website pushes week day visitors, but few restaurants are open. Very unhappy about food situation. Winery restaurants are too expensive.*

  *We would have liked to know approximately when shops open. We came earlier and did not know shops do not open weekdays until mid morning.*

- **Retail variety and pricing**
  
  *Can't shop if everything is out of your price range; All the stuff is overpriced* 

  *Get some shopping - the majority of the stores are just Chinese junk*

- **Lodging availability and pricing**
  
  *Hotels are too expensive and run down.....*
SUMMARY

• Evaluation: Overall satisfaction is high

• Findings:
  – Fredericksburg is a vacation destination, appealing to middle aged, middle income* women
  – Top drivers, in order are:
    • Dining
    • Shopping & antiquing
    • Museums & historical attractions
    • Natural bounty (wineries, peaches, wildflowers)

* 56% under $150K/year
RECOMMENDATIONS

The top suggestions for improvement include improved traffic and parking in downtown, expanded hours and more variety in retail, dining, and lodging options. To accommodate visitor requests, consider how to cope with growth:

- Parking and traffic capital projects must be considered
- Continue to reinforce the need to extend open hours

Marketing

- Two key themes emerge that will continue to differentiate Fredericksburg:
  - Unique **historical** city and museums
  - **Back-to-nature experiences** with the land and natural bounty (parks, peaches, wildflowers, wineries)