

DistiNctly Fayetteville

Fayetteville/Cumberland County Community Stakeholder Evaluation

Prepared for DistiNctly Fayetteville

Delivered June 2024

THE CLOSEST TO THE CUSTOMER WINS.



Project Overview

Purpose. The objective of the Community Stakeholder Study is to evaluate how local and regional Fayetteville/Cumberland County area residents feel about the community as a travel destination. This study explores what residents particularly like about the area and what they would like to see improved. It also measures the extent to which residents are likely to recommend Fayetteville/Cumberland County as a tourist destination to their friends and family members and the “why” behind the rating.

Target Audience. This research was conducted among a combination of house sources (Facebook, PWC, etc.) and a general population cell of residents living in Fayetteville, Cumberland County or surrounding counties. Panel respondents were screened to ensure they are adult decision makers who either live in or near Fayetteville/Cumberland County.

Sample. A total of 678 responses were collected for this research which provides for a maximum margin of error of +/- 3.8% at a 95% confidence interval. Broken out by key segment, this includes responses from 528 house list sources and 150 panel member residents.

Where feasible, comparisons to consumer responses from the original 2021 community study were provided for context.

Key Takeaways

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Key Takeaways

- **Few Residents are Likely to Recommend Fayetteville/Cumberland County.** As acknowledged, Fayetteville/Cumberland County has a low Net Promoter Score of -68%, indicating that 77% of residents would not recommend the area, primarily due to high crime rates, limited attractions, and a "run down" image. The few (9%) promoters indicated the reason they are most likely to recommend Fayetteville is largely because of its rich military history and/or diverse activities such as outdoor recreational activities.
- **Mixed Perceptions of the Area.** While fewer than half of the residents find Fayetteville appealing as a place to live, work, or play; the area's military history, affordability, and diverse activities are positive aspects.
- **Crime and Infrastructure Concerns.** High crime rates, poor infrastructure, economic issues and unappealing aesthetics are major concerns among residents, overshadowing the more positive aspects like military presence, affordable cost of living and southern hospitality.
- **Tourism Brand Attributes.** Fayetteville is best described as a great place for military families and history enthusiasts, with military/historic sites, spectator sports, restaurants, downtown and museums being key attractions. However, residents note crime and education are areas needing improvement that detract from Fayetteville's brand image.
- **Community Engagement.** Community residents are most familiar with Distinctly Fayetteville's social media platforms and tourism website which they also rate as being the most helpful for tourists visiting the area, indicating a level of engagement with local tourism promotion efforts.
- **Demographic Insights.** A significant portion of the community has a military association, and more than half of the residents have lived in the Greater Fayetteville area for more than 10 years. The average age of resident respondents was 45 years, with a substantial number of younger residents (18-34 years) and a notable representation of People of Color (35%).

01. Community Assessment

N=678

02. Categorization

DISTINCTLY FAYETTEVILLE KPIs



Net Promoter Score:

-68%



Place to Live:

Top-Box: 8%



Place to Play:

Top-Box: 5%



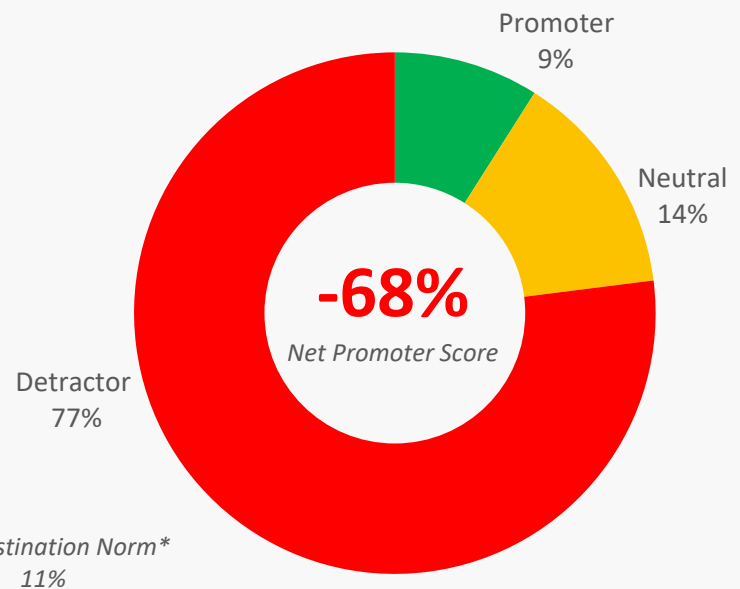
Place to Work:

Top-Box: 7%

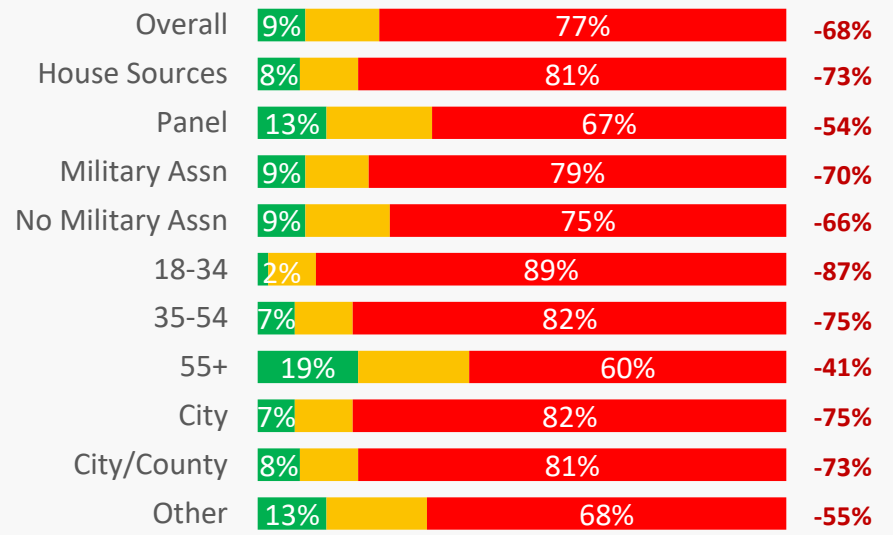
KPIs = Key Performance Indicators

Community residents are unlikely to recommend Fayetteville, offering a -68% Net Promoter Score with 77% saying they would not recommend the area compared to 9% who would. This is well below H2R's Norm for destinations (11%).

Net Promoter Score (NPS)



NPS By Customer Niche



Q5: Please indicate how likely you would be to recommend Fayetteville/Cumberland County as a place to visit to a friend or family member. 11-pt. scale
 *H2R Destination Norm is comprised of destinations nationwide to provide Fayetteville context for how they compare to other destinations. H2R Norm data is comprised of panel only.



Why Residents are Unlikely or Likely to Recommend Fayetteville?

Community residents point to issues such as high crime rates, limited attractions and a “run down” image as the primary reasons they would not recommend Fayetteville. Conversely, the area’s rich military history and diverse activities provide some of the key reasons others would recommend Fayetteville.

Limited Attractions

While there are some attractions such as historical sites and outdoor activities, many residents feel there aren't enough unique or significant attractions to draw tourists.

High Crime Rate

Many residents mention a pervasive sense of danger, with frequent references to crime, safety concerns, and the presence of panhandlers. This significantly detracts from the overall appeal of the city.

Perception & Reputation

The city's reputation as primarily a military town with few tourist amenities, compounded by a "run-down" image and its nickname "Fayettenam," negatively affects its appeal as a travel destination.

Rich Military History

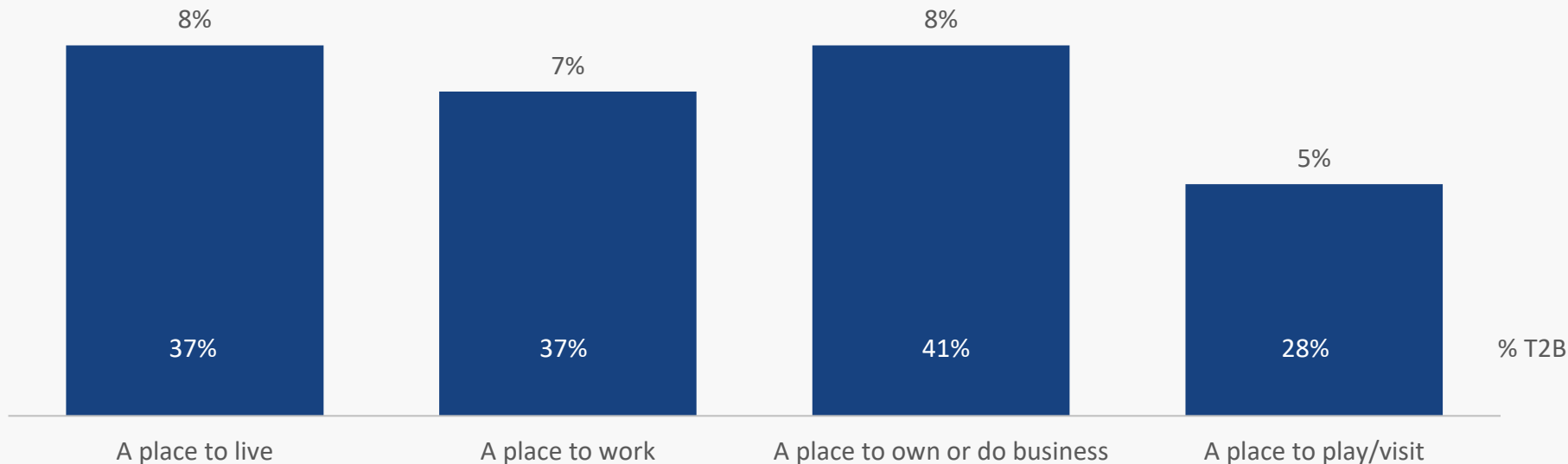
Fayetteville is home to Fort Liberty, one of the largest military installations in the world, and the Airborne & Special Operations Museum. Residents feel that visitors interested in military history and culture would find this aspect particularly appealing.

Diverse Activities

There are numerous things to see and do, including outdoor activities like hiking, birdwatching, fishing, and boating plus attractions such as the Cape Fear Botanical Garden, Carvers Creek State Park, and zip lining.

Fewer than half of the residents responding to this survey rated Fayetteville/Cumberland County as an appealing/very appealing place to live, work or play. There was little difference between list sources.

Perception Appeal of Fayetteville/Cumberland County
% Very Appealing



Most & Least Appealing Aspects of Living In Fayetteville/ Cumberland County

Fayetteville received 0.6 positive or appealing comments for every 1.0 negative comment generated. Most residents find the cost of living and military presence appealing, but others are concerned about high crime rates, infrastructure, economic issues and unappealing aesthetics.



■ Negative ■ Positive

Cost of Living

Affordable housing and low cost of living are frequently mentioned, making it an attractive place to live and visit.

Military Presence

The presence of Fort Liberty and related attractions, such as the ASOM, draw interest for their historical and cultural significance.

Small-Town Feel

Despite its size, Fayetteville maintains a hometown feeling with friendly and welcoming residents.

Diverse Activities

A variety of parks, outdoor recreational activities, and cultural events provide ample opportunities for entertainment and relaxation.

High Crime Rate

Residents frequently mention crime as a major concern, including issues with drugs, shootings, and general safety concerns.

City Management & Infrastructure

Criticism of local government for focusing on aesthetics over substantial community needs and failing to manage infrastructure, traffic & road maintenance

Unappealing Aesthetics

The city is perceived as rundown with numerous empty and abandoned buildings, litter, and poor maintenance of public spaces.

Traffic Congestion

Heavy traffic, exacerbated by events and the presence of the nearby army base is frequently mentioned as a significant inconvenience.

Economic Issues

High cost of living relative to wages, limited career opportunities, and the prevalence of low-paying jobs are significant drawbacks.

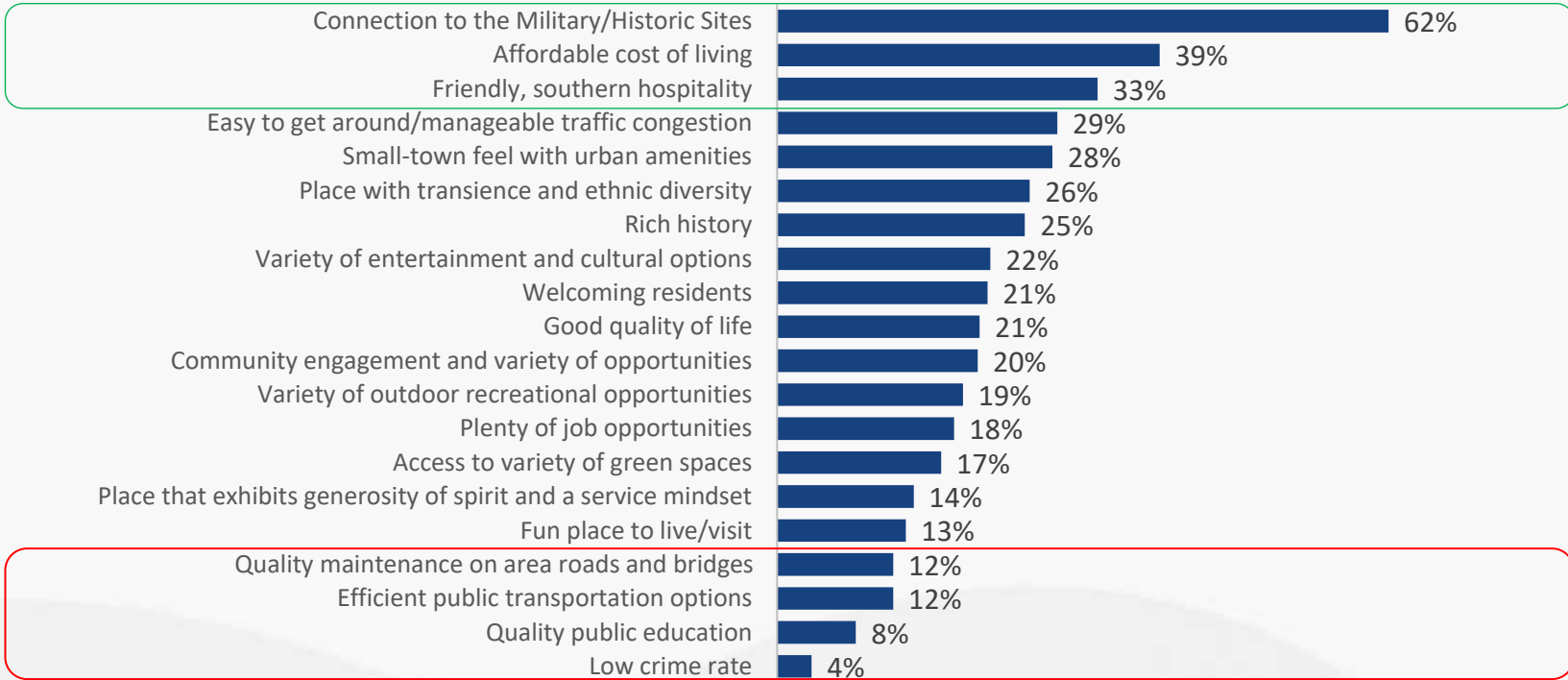
Q8: What is it about living in or near the Fayetteville/Cumberland County area that you find most appealing or like best? Please be specific.
Q9: What is it about living in or near the Fayetteville/Cumberland County area that you find least appealing or could be improved? Please be specific.



As a place to live, work or play; Fayetteville is best associated with its connection to the military, affordability and friendliness. Conversely, crime, education, and efficient transportation are areas of concern.

Phrases That Best Describe Fayetteville as a Place to Live, Work or Raise a Family

Select All That Apply



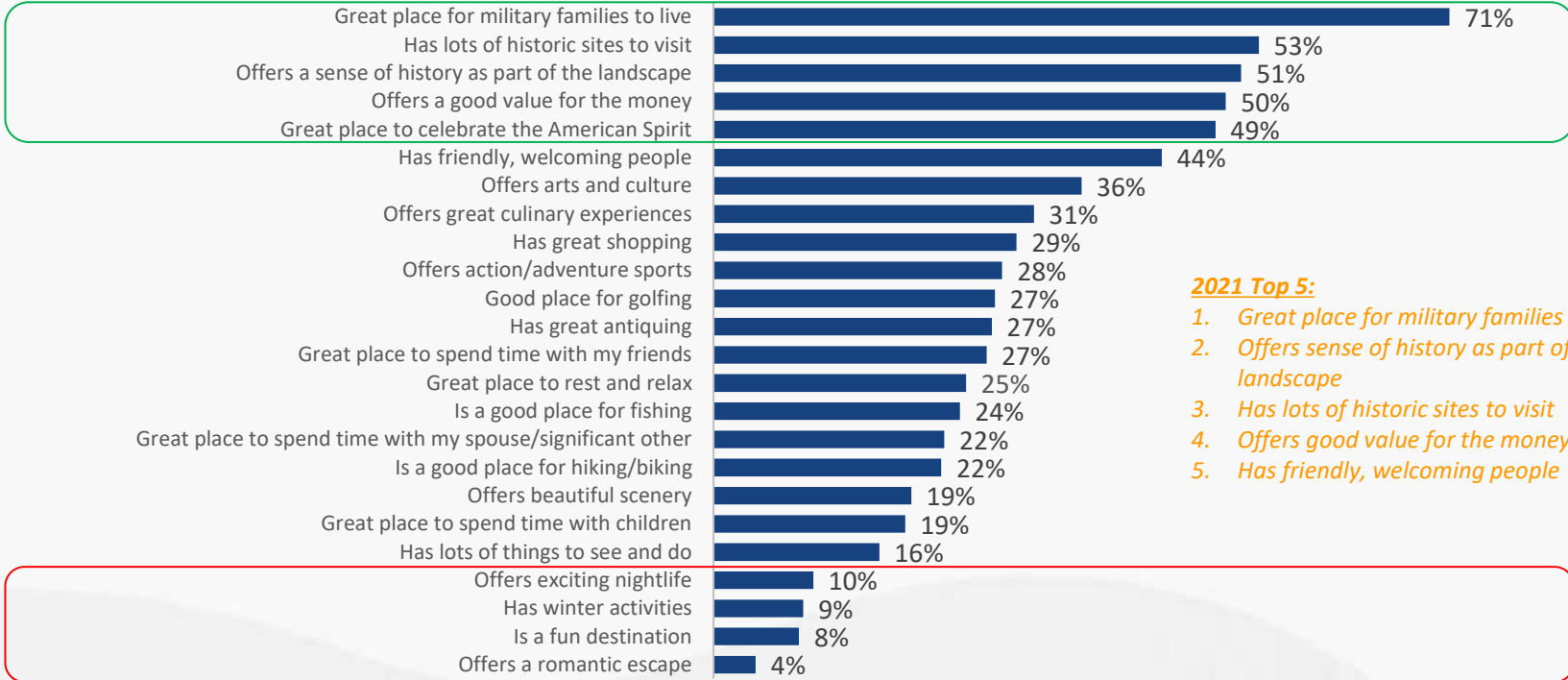
Q10: Which of the following words or phrases do you believe best describe the Fayetteville NC/Cumberland County area as a place to live, work, raise a family or start a business? Please select all that apply.



Alternatively, as a place for tourists to visit; Fayetteville is best described by being a great place for military families, sense of history, historic sites and good value for the money.

Phrases That Best Describe Fayetteville to Tourists

Select Up to Seven



2021 Top 5:

1. Great place for military families to live
2. Offers sense of history as part of the landscape
3. Has lots of historic sites to visit
4. Offers good value for the money
5. Has friendly, welcoming people

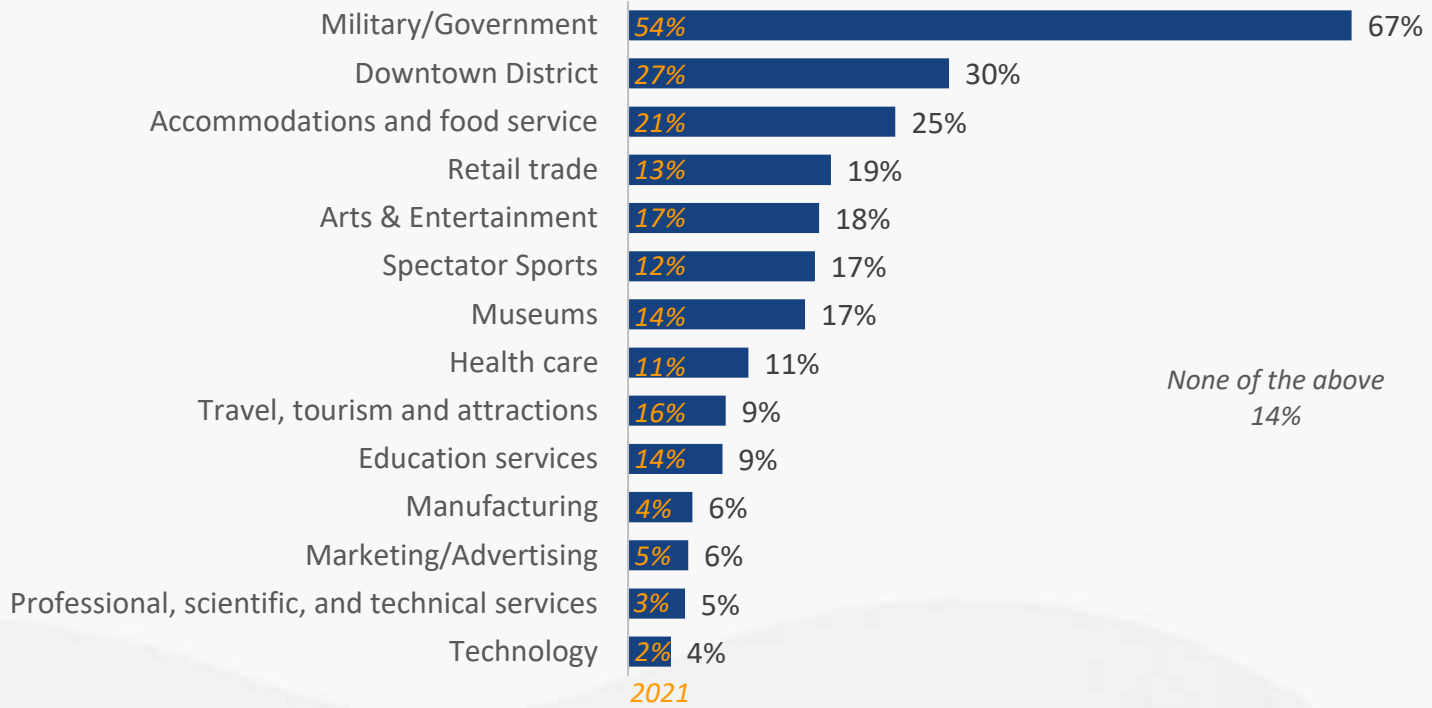
Q14: Please select the top 7 statements below that you feel best describe Fayetteville as a place for travelers to visit.



The areas/aspects the community feels Fayetteville most excels in include Military/Government, Downtown, Accommodations and Food Service, even more so than in 2021.

Areas/Aspects Fayetteville Truly Excels In

Select All That Apply



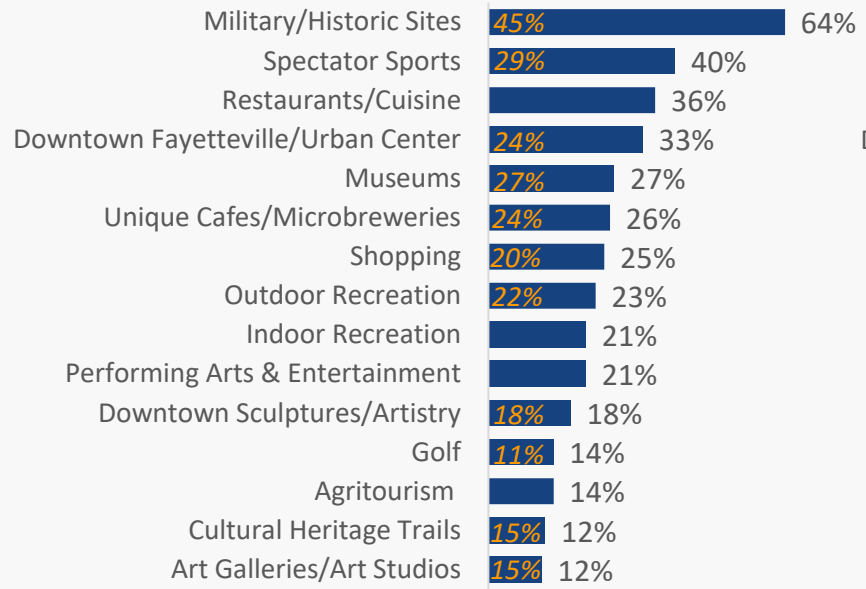
2021

Q11: In your opinion, which of the following areas/aspects do you feel that the Fayetteville NC/Cumberland County Area truly excels in? Please select all that apply.



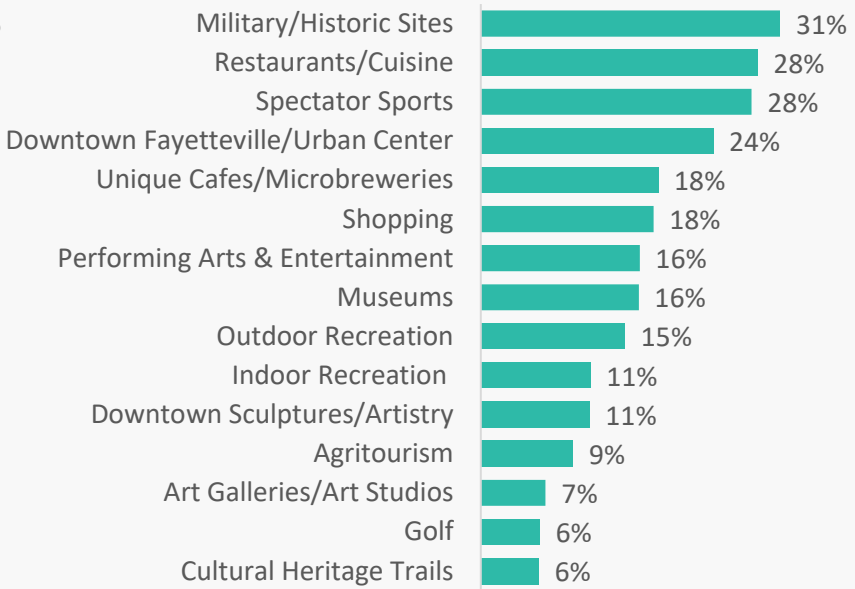
The attractions/activities the community feels most influence tourist visits are Military/Historic Sites, Spectator Sports, Restaurants, Downtown, and Museums. Residents are similar but swap for Microbreweries.

Attractions/Activities/POI* for Travelers



2021

Attractions/Activities/POI* for Locals



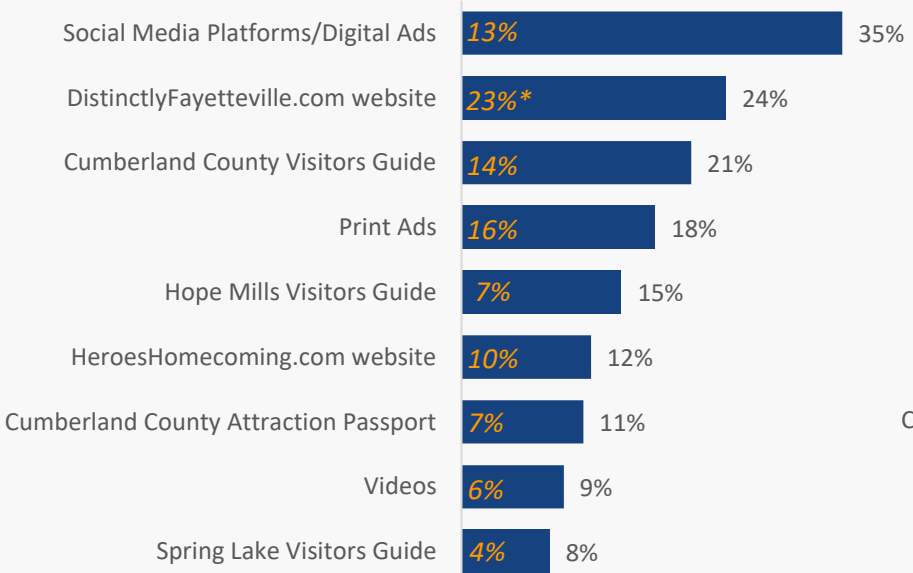
Q12: Which of the following attractions, activities or points of interest that you are familiar with do you believe are of the greatest interest to TRAVELERS VISITING to the Fayetteville NC/Cumberland County area? Please select all that apply.
 Q13: Which of the following attractions, activities or points of interest that you are familiar with are of the greatest interest to you or area/regional residents similar to you? Please select all that apply.



The community is most familiar with DistiNctly Fayetteville’s social media platforms and tourism website, which are also considered the communication materials that are most helpful for tourists.

DistiNctly Fayetteville Communications

Select All That Apply

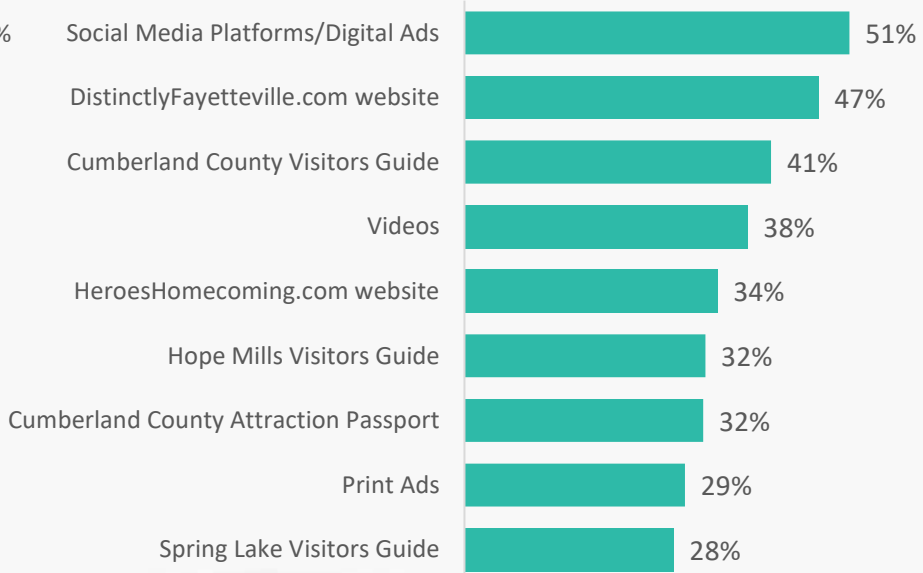


2021

Not aware of any of these: 38%

Helpful DistiNctly Fayetteville Communications

% Somewhat/Very Helpful for Tourists



Competitive Set Average: 37%

Q15. Which of the following DistiNctly Fayetteville communication materials have you seen or are you familiar with? Please select all that apply. Q16. And whether you are familiar with each of these resources or not, please use the scale provided to indicate how helpful you believe these resources may be to tourists visiting the Fayetteville/Cumberland County area from other parts of the country. (5-point scale)

*VisitFayettevilleNC.com in 2021



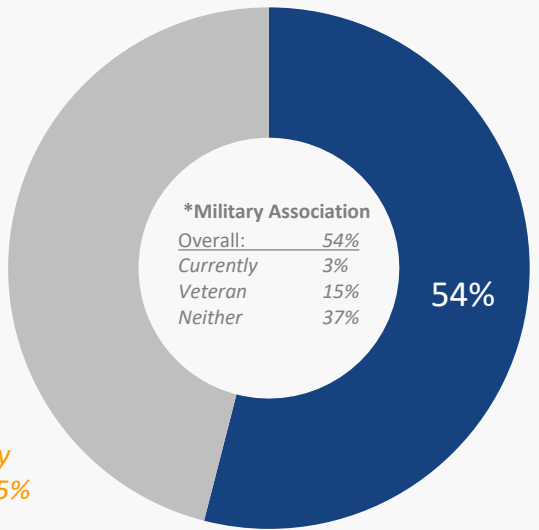
01. Community Assessment

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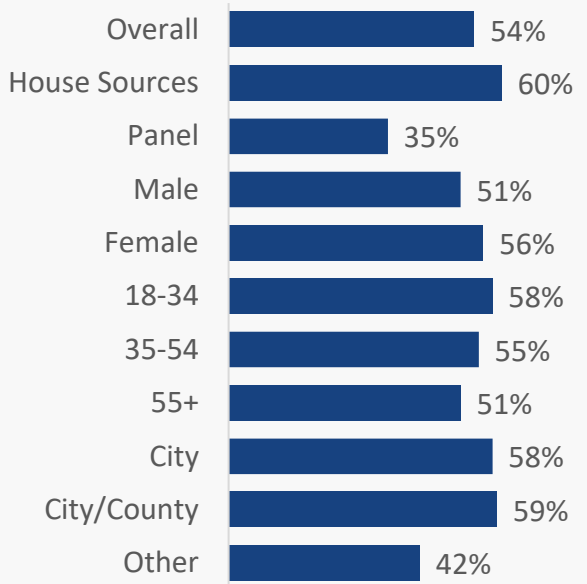
More than half of community respondents have a military association*. This was especially true among house list sources, city/county respondents and those aged 18-34 years.

Military Association *% of Respondents*



2021 Military Association: 55%

Military Association by Niche

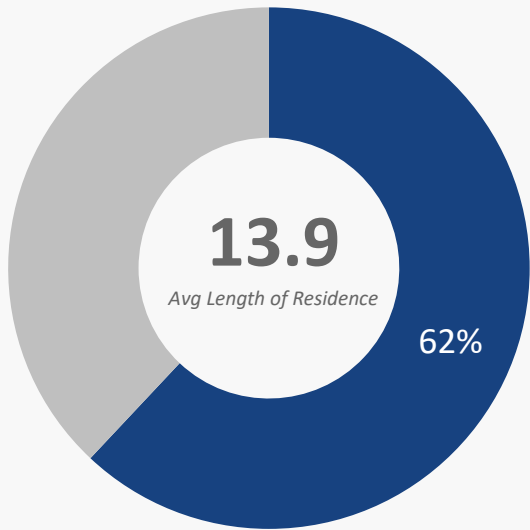


Q17: Are you, or anyone in your immediate household, currently serving or have you ever served in the military?

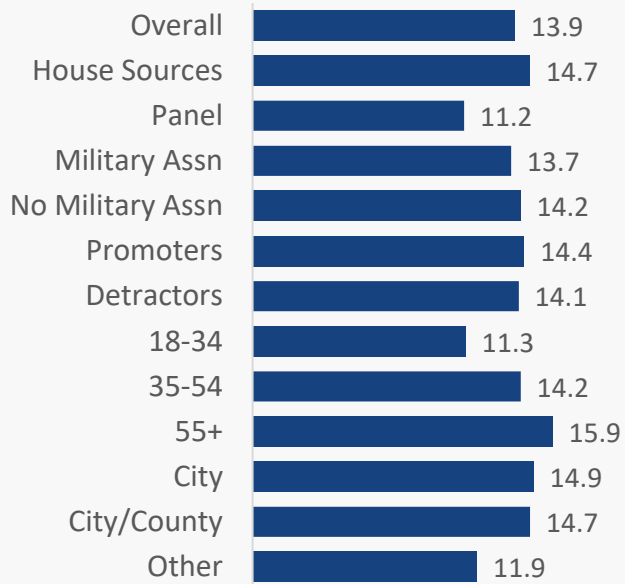


Nearly two in three (62%) area residents have lived in the area for more than 10 years with an average of 13.9 years. Those over 55 years of age have lived in the area the longest.

Length of Residence
% More than 10 Years

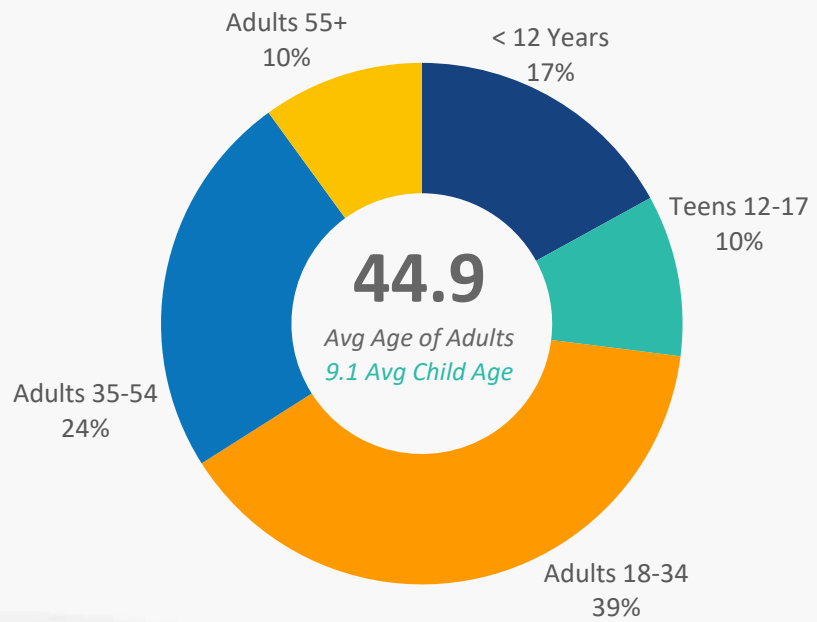


Avg Length of Residence by Niche (Years)

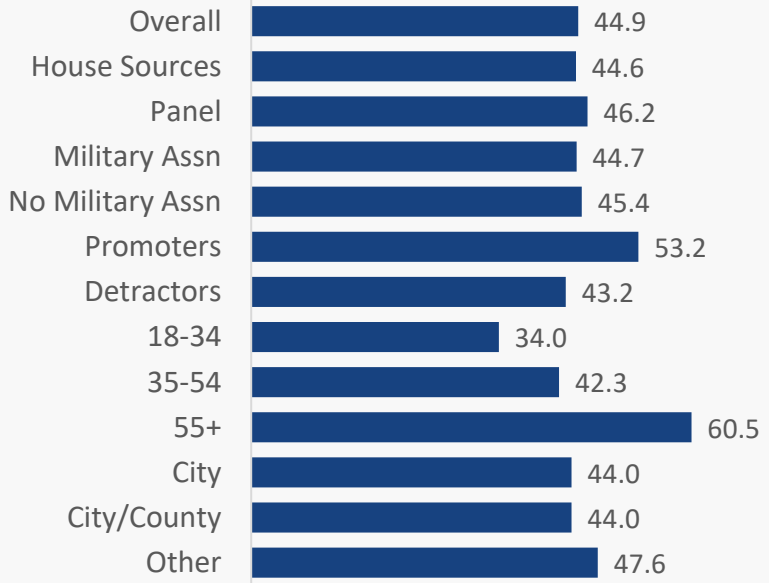


The average respondent age was nearly 45 years old with 39% between 18-34 years of age. House sources were slightly younger than the gen pop panel.

Household Ages



Average Adult Age by Niche

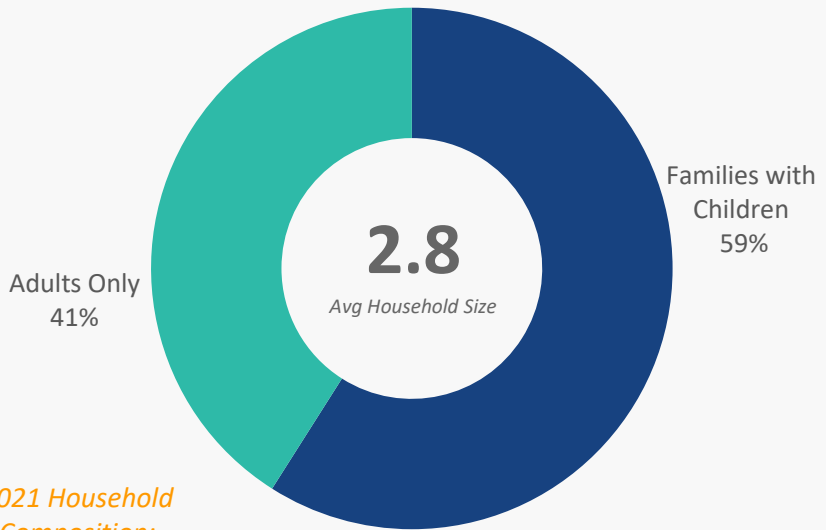


Q19: Including yourself, how many people in your household fall into the following age categories?



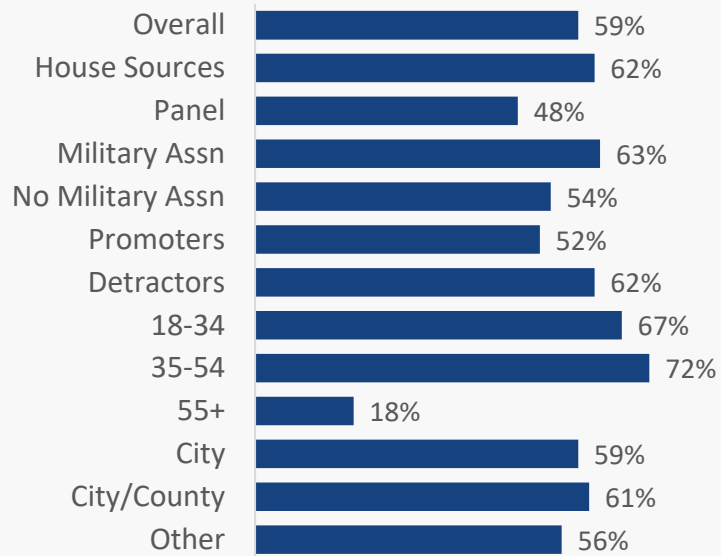
Nearly three in five respondents have children at home (59%) while the balance of respondents are adult-only households. And results were remarkably similar across niches except, of course, by age.

Household Composition



2021 Household Composition:
1.17 Avg. HH Size
55% Families with Children
45% Adults Only

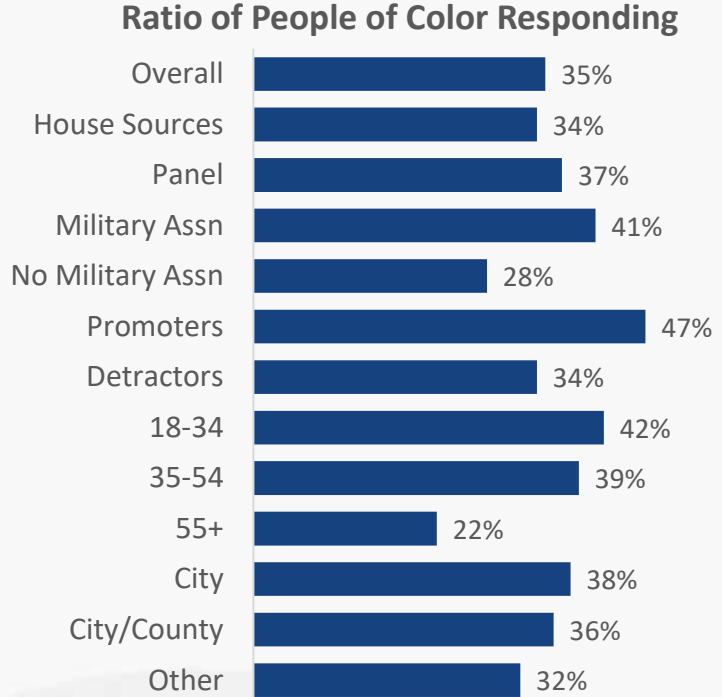
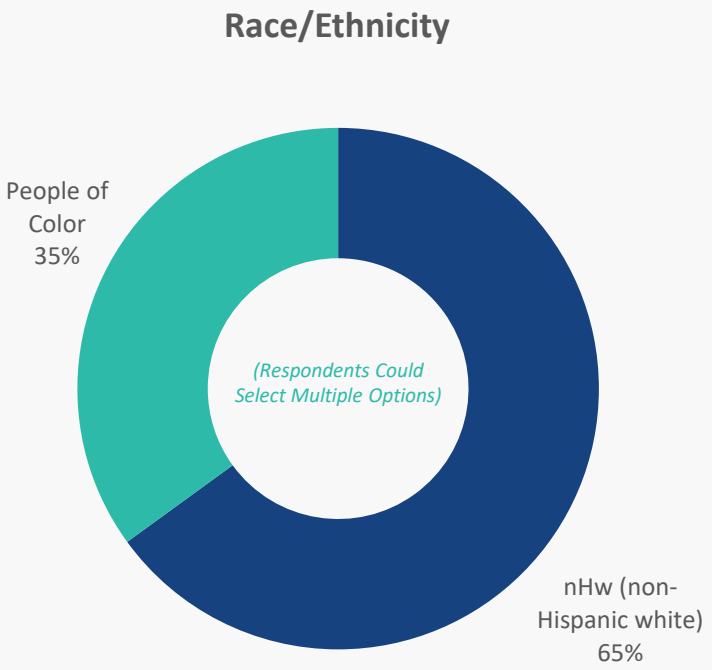
% Households with Children < 18 by Niche



Q19: Including yourself, how many people in your household fall into the following age categories?



More than one-third of the residents responding to this survey (35%) were People of Color. Area Promoters were the most likely to be People of Color compared to any other niche.



Q20: Which ethnicity do you consider yourself? Please respond for you personally, not for others in your household. Please select all that apply.
*nHw = non-Hispanic white



Categorization/Demographics of Key Community Niches

		OVERALL	FAYETTEVILLE ONLY	FAYETTEVILLE/ CUMBERLAND COUNTY	SURROUNDING COUNTIES
Resp Age	Respondent Age	45.4	44.4	44.6	47.6
	18-34 years	28%	29%	29%	25%
	35-54 years	43%	45%	45%	39%
	55+ years	29%	26%	26%	36%
Household Comp	Under 12 years	17%	17%	18%	17%
	12-17 years	10%	10%	10%	8%
	18-34 years	39%	41%	40%	37%
	35-54 years	24%	24%	24%	24%
	55+ years	10%	8%	8%	14%
	Household Size	2.8	2.9	2.9	2.5
	Families	59%	59%	61%	56%
Adults	41%	41%	39%	44%	
Military Association	54%	58%	59%	42%	
Length of Residence	13.9	14.9	14.7	11.9	
Ethnicity	White	65%	62%	64%	68%
	Black	23%	25%	23%	21%
	Asian	3%	3%	3%	3%
	Hispanic/Latino	10%	12%	11%	8%
	People of Color Overall	35%	38%	36%	32%
Sample Size	678	413	489	189	



Research developed for DistiNCTly Fayetteville by H2R Market Research.

Our team loves the magic of data and research. We work until the voice of your customer is clear and you have the answers you need. If you have questions about this report, please let us know:

Email: mbemarkt@h2rmarketresearch.com

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