destination MAP

meetings assessment program

Fayetteville Special Report

Prepared for:

Fayetteville Convention and Visitors Bureau

RRC ASSOCIATES

An STR Company

DestinationMAP Custom Report: Fayetteville

Prepared for:

Fayetteville Convention & Visitors Bureau

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Overview and Key Findings

DestinationMAP is a comprehensive study of meeting planners and the meetings market in North America. The report provides a detailed description of meeting planners' preferences and their perceptions of 40 North American destinations. In conjunction with the major national study, this study is a custom study which applies findings and techniques to the unique market of Fayetteville, North Carolina.

Key Findings

Key findings, presented below, represent highlights from the Fayetteville Custom Study. A Table of Contents follows this introductory and highlight section. Overall, Fayetteville is perceived as a strong meeting destination among its client group, though on select attributes and considerations competitive destinations are viewed more positively.

Section 2: Meeting Rotation and Selection of Fayetteville

- Respondents listed their top three destinations for meetings of 50 to 500 attendees and the following destinations were cited most frequently as top destinations:
  - Orlando, FL
  - Chicago, IL
  - Nashville, TN
- Over half (57 percent) of respondents indicate that they add a new destination to their rotation schedule every year.
- Just under a quarter of respondents (24 percent) try to never repeat a destination.
- Slightly more than three quarters of respondents (76 percent) have not considered Fayetteville for a meeting or event.

Section 3: Site Selection Considerations and Deterrents

- The top three most important considerations for respondents when selecting a site are:
  - Moderate food and lodging costs
  - Good value for the money
  - Good hotels
- The top three factors most likely to cause a respondent to rule out a destination are:
  - Exorbitant costs
  - High cost to get there
  - Excessive room or sales tax

Section 4: Travel Image

- Fayetteville's image profile is developed relative to a competitive set of destinations which include: Greensboro, Pigeon Forge, Myrtle Beach, and Valley Forge. Among this set of destinations Fayetteville is perceived by respondents to have image strengths in the following areas of Travel Image:

- Interesting culture/history/museums
- Inexpensive to get to
- Good value for the money

- Relative to the same competitive destinations, Fayetteville is perceived to have image weaknesses in the following areas:
  - Prestigious address
  - Good sightseeing
  - Good family destination

Section 5: Negative Travel Image

- Study respondents were also asked to identify deterrents in Fayetteville and competitive destinations. Relative to competitive destinations Fayetteville *does not* have negative image problems in the following areas:
  - Exorbitant costs
  - Excessive room or sales tax
  - Inappropriate for serious business meetings
- Relative to the competitive destinations, Fayetteville *does* have image weaknesses which might deter a meeting planner from holding a meeting or event on the following considerations:
  - Nothing to do there
  - High crime rate
  - Air pollution/smog

It should be noted that concerns over crime and air quality are still rather small, though Fayetteville does fall above the competitive set average (which is undesirable).

Section 6: Marketing to Meeting Planners

- Fayetteville is a relatively strong performing destination with respect to its marketing exposure among survey respondents across all channels in the past 12 months.

Marketing Exposure in Past 12 Months	Percent	
	Fayetteville	Competitive Set Average
Received direct mail	27	28
Saw trade book ads	27	32
Visited website	23	16
Visited trade show booth	23	20
Saw Internet ads	14	16
Called on by bureau staff	11	15
Visited Facebook page	2	2
Followed on Twitter	0	1

Additional Inquiries

The **DestinationMAP** data, when coupled with STR data, provide a comprehensive view of meetings to representatives of the hospitality industry. With new techniques and ways of segmenting and visualizing the data there are opportunities to go beyond the topics and details provided in this report. For more specific insights into the nature of the meetings market, the performance of specific meetings in a destination and the preferences of meeting planners, contact us:

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Table of Contents

This **DestinationMAP** Custom Report has six sections. Each section begins with a description of its contents and highlights for ease of use. The Table of Contents provides a detailed overview of the report.

Section 1: Details on Methodology and Sample

Fayetteville Custom Study

Fayetteville elected to do a Custom Study which is a survey of meeting and event planners from Fayetteville's client and prospect lists. This Custom Study uses a similar methodology to other custom studies conducted in conjunction with the main **DestinationMAP** study.

The Custom Study is designed to provide insights among a destination's own clients, illuminating the strengths and weaknesses of a destination from those who know it best.

Organization of Section 1:

1.1 Background
1.2 Research Approach
1.3 Questionnaire Design

1.1: Background

DestinationMAP obtains strategic marketing information relative to factors influencing the selection of convention sites, market segmentation, and exposure to destination marketing activity.

DestinationMAP, formerly **METROPOLL,** has been conducted as a longitudinal study over the past 28 years. This wealth of experience and data provides **DestinationMAP** studies and Custom Reports with a broad perspective on trends and market positions. Some key metrics evaluated are:

- Evaluation as a travel destination
- Reputation for meeting facilities
- Travel image

DestinationMAP also develops measures of the impact of individual destinations' marketing activity. Specific measurements include claimed exposure to Internet and trade book ads, trade booth and web site visits, direct mail and sales calls. The individual subscriber can learn how their destination compares to various norms.

1.2: Research Approach

Sampling Procedure for Custom Study

For the Custom Study, a client list was provided by Fayetteville with contact information for individuals and organizations which had held or were planning to hold a meeting in Fayetteville. These clients were contacted via email with an invitation to provide responses to the Custom Study questionnaire, which was a web-based questionnaire, with language developed in conjunction with the Fayetteville Convention and Visitors Bureau.

Response Rates

Meeting and event planners were offered a $10 gift card for their time and a total of 51 completed the study while 26 submitted partial responses.

1.3: Questionnaire Design

Fayetteville Custom Study

For the Fayetteville Custom Study a special survey instrument was developed with a series of image and meeting planning questions which were fielded to a client list provided by Fayetteville.

- Fayetteville's clients were sent a series of email invitations to the Custom Study with an incentive offered to those who completed the survey.

- The Custom Study was a web based survey, employing identical phrasing of questions to allow comparability to **DestinationMAP** results.

- Questions of special interest to Fayetteville were developed and utilized in the study.

1.4: Respondent Details

There are a wide variety of meeting planners represented in the study. Nearly a quarter plan sports events and just over twenty percent plan military veterans' events.

Table 1.
Meeting You Plan Are Primarily

Would the meetings you plan be primarily for….

Meetings You Plan Are Primarily	Percent
Sports Groups	23%
Military Veterans	21
Religious Groups	17
Corporations or Business Groups	12
Associations or Societies	10
Educational Groups	8
Social or Fraternal Groups	6

Additionally, respondents came from a wide variety of states. While seven states accounted for just over half of all responses, a total of 24 states were represented in the responses. The table below shows the seven states which accounted for more than 2 percent of all responses.

Table 2.
Home State of Respondent:
States Accounting for More than 2% of Responses

In what state is your home office located?

State	Percent
North Carolina	12%
Texas	10%
Indiana	8%
Colorado	8%
Georgia	6%
South Carolina	6%
New Jersey	4%

Section 2: Meeting Rotation

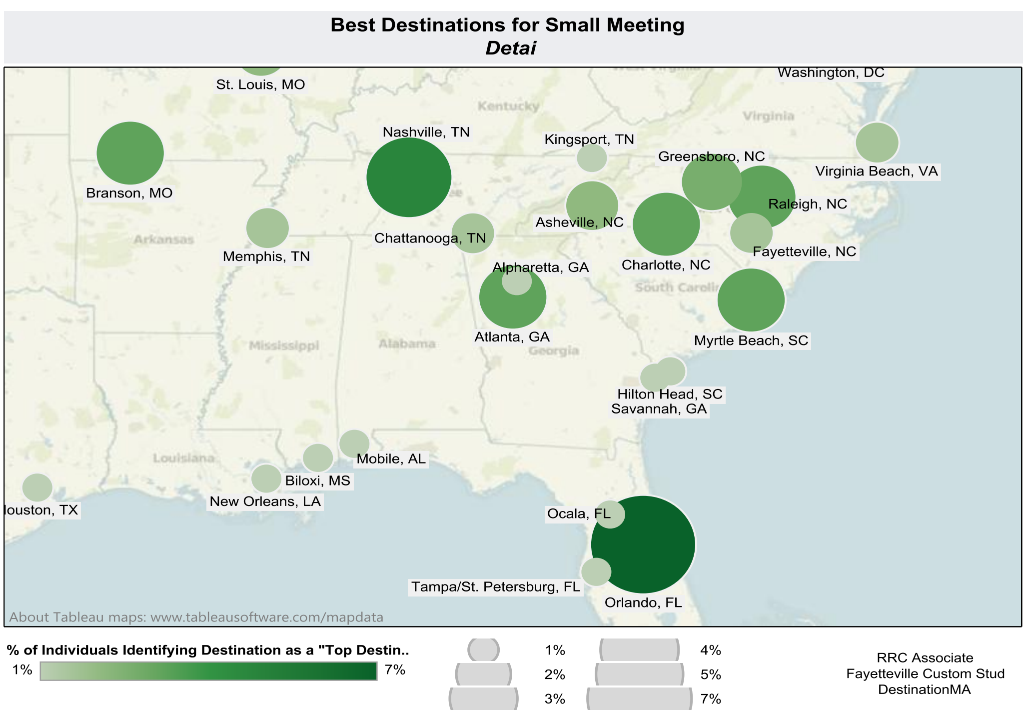
This section of the report provides perspective on small meeting holders, the destinations they consider to be the best destinations in the country and details on how they rotate meetings to various destinations. Findings draw on the Fayetteville Custom Study.

2.1: Top Destinations for Small Meetings

Meeting and event planners were asked to list the top three destinations for meetings of 50-500 attendees. This was an open ended question and planners could list any destination. The top destinations were destinations which are more commonly thought of as large meeting destinations: Orlando, Chicago, Nashville, and San Antonio. This emphasizes the need of small destinations to clearly communicate their benefits and effectively target groups which are a good fit as the competition is no longer regional or limited to other small market destinations.

Table 3.
Top Ranked Destinations for Small Meetings

Destination	Percentage Identifying as Destination as Best for Small Meetings and Events
Orlando, FL	7%
Chicago, IL	5
Nashville, TN	5
San Antonio, TX	4
Las Vegas, NV	3
Louisville, KY	3%
Atlanta, GA	3
Branson, MO	3
Charlotte, NC	3
Myrtle Beach, SC	3
Raleigh, NC	3%
San Diego, CA	3
Denver, CO	2
Greensboro, NC	2
Kansas City, MO	2
Asheville, NC	2%
Colorado Springs, CO	2
Indianapolis, IN	2
Salt Lake City, UT	2
St. Louis, MO	2
Washington, DC	2



2.2: Rotation Schedule for Meetings and Events

In the Fayetteville Custom Study meeting planners were asked about meetings they hold which have between 50 and 500 attendees. Planners were asked to describe the meeting or event, how often it is scheduled, and how they move it geographically.

The vast majority of respondents (73 percent) indicate that their meeting of 50-500 attendees is held every year (table below).

Table 4.
Frequency of Meeting/Event

Is This Meeting/Event Held:	Percent
Twice or More a Year	18%
Once a Year	73
Once Every Two Years	7
Once Every Three Years or Less	2

Encouragingly, those who hold small meetings and events are quite likely to try new destinations – with over half of respondents indicating that they add a new destination to their rotation schedule every year and only seven percent indicating that they never add new destinations to their rotation schedule (table below).

Table 5.
Frequency of Selecting a New Meeting Site
How often do you select a new destination to host your meeting/event or add a destination to your rotation schedule?

Add a New Destination to Rotation Schedule:	Percent
Every Year or More	57%
Every Other Year	17
Every Three Years or More	23
No New Destinations are Added to Rotation Schedule	7

When rotation schedules are investigated in more detail, only a small percentage of meeting planners indicate that they do not rotate meetings and always hold their meetings at the same location (10 percent). However, the market for small meetings is quite competitive and is largely a national market: over half of respondents (52 percent) indicate that they rotate their meetings around the country.

Table 6.
Geographic Site Rotation

Please select the best description for how you rotate your meeting:

Geographic Site Rotation	Percent
Around a State	15%
Around a Region	20
Around the Country	52
Internationally	3
Do Not Rotate Meetings	10

The table below shows how frequently a small meeting planner repeats a destination (among those who rotate meetings). Just under a quarter of respondents indicate that they try never to repeat a destination for their small meetings. Of those who do repeat destinations in their meeting/event rotation, the trend is toward infrequent repetition of destinations: 38 percent indicate that they repeat a destination every fourth year, fifth year, or less frequently.

Table 7.
Frequency of Repeating a Destination in Rotation Schedule
Among Those Who Rotate Meeting/Event Sites

How often do you repeat a destination in your meeting/event rotation schedule?

Repeat a Destination	Percent
Every Other Year	18%
Every Third Year	20
Every Fourth Year	10
Every Fifth Year or More	28
Try Never to Repeat a Destination	24

2.3: Rotation Schedule for Meetings and Events Special Comments

Meeting planners were also asked to describe their meeting/event rotation strategy. In general the comments from respondents indicate that they are likely to rotate their meeting to a destination if they have a presence in the region/city and support from their membership.

If the rotation description above is insufficient, please describe in your own words how you rotate meetings and events which you are responsible for planning

- *By having discussions with those wanting a meeting*
- *East Mid West Mid East and on and on*
- *Everything.*
- *Has to be held in a geographical region*
- *may go to same city, maybe not same hotel.*
- *one out of every 3 meetings rotate out of our host city.*
- *Our events are connected with our championships and we try to locate them centrally to our state. Our Annual Meeting is held once a year centrally. We do hold regional meetings once a year in all 8 regions of the state.*
- *placing bids*
- *Rotation is based totally on rate, activities for the group to do, area restaurants, etc*
- *States are voted on by general membership and reunion committee selects city.*
- *The Board of Directors meeting. Look for easy access from airport. Flights need to be affordable and the location has to be rotated every three years to make it affordable for 1/3 of the group each year*
- *Volunteer*
- *We hold events in mostly the eastern half of the United States and we try to hold event in the south one year and then more to the north the following year. With that saying we keep in mind where the largest amount of people are coming from. So if we have more from the south we try not to go to far north so the majority we not have to travel as far to our event.*
- *We rotate as often as possible, but are willing to repeat visit if necessary.*
- *We run 9 events a year rotating based on venue availability.*
- *We stay in the Southeast in major metro areas for better air service. Use various cities - no specific rotation*
- *We take a vote on where to hold the meeting/reunion*
- *We typically do not return to a site more frequently than once every 10 years. Every state wants to host, so competition is fierce.*
- *We usually hold the event in the same city for two or three years then move to the next city*

2.4: Selecting Fayetteville

Despite the fact that the contact list for the study came from the Fayetteville CVB, very small proportions of meeting planners have previously considered or selected Fayetteville as a destination for a meeting or event. Just less than a quarter of respondents (24 percent) have considered Fayetteville for their meeting or event, with a total of 12 percent actually selecting Fayetteville for their meeting or event.

Table 8.
Held a Meeting or Event in Fayetteville

In the Past 3 Year I Have	Percent
Considered Holding a Meeting/Event in Fayetteville, NC and selected another destination	12%
Held a Meeting/Event in Fayetteville, NC	12
Not Considered Fayetteville, NC for my Meeting/Event	76

Open Ended Responses

What are the top three appeals of Fayetteville which might draw you back for a future meeting/event?

- *Friendliness of staff, Great location for our needs, Location*
- *good hotel prices, good foods, friendly area*
- *Easy to get to, Attractions, Low Cost*
- *Central location, Major military museums, Good value for money*
- *Military connection, Reasonable costs*

What are the three top detractors which might discourage you from holding a future event in Fayetteville?

- *none*
- *Airline Travel, Crime, Cost*
- *Lack of high quality hotels near other things to do, Past reputation for being unsafe*
- *Room tariffs*

Because the proportion of planners indicating that they had held a meeting in Fayetteville is small, it is not possible to report with a high degree of confidence on their satisfaction with meetings in Fayetteville. However, it is possible to see the destinations other meeting planners selected instead of Fayetteville and the reasons why they did not choose Fayetteville. The following section examines alternative destinations in more detail.

2.5: Destination Selection – Reasons Fayetteville Not Selected

This section displays the destination meeting planners selected instead of Fayetteville and the reasons they listed for not selecting Fayetteville.

Destination Selected	Reasons for Not Selecting Fayetteville (Top three listed, separated by commas)
Asheville, NC	High airline fees, Expensive costs, Not an attractive destination
Atlanta, GA	not known for direct flights (internationally), not site of other meetings for my industry,
Atlanta, GA	Location, Hotel, Airport
Atlanta, GA	Accessibility, Rates, CVB support
Beaufort, SC	Not near event, MCRDPI
Charleston, SC	Not enough information
Charlotte, NC	Too small, No major airport, Don't know much about it
Charlotte, NC	Not familiar with the city, No one has asked for Fayetteville, No one from Fayetteville has contacted me
Charlotte, NC	
Chicago, IL	Looking for a larger city, Looking for a central city,
Chicago, IL	Popularity, Lack of large airport, Sport Arena
Columbia, SC	No contact, No Information, Location
Dayton, OH	MEMBERS VOTED AGAINST IT
Decatur, IL	Locally driven content, Local funding sources
Denver, CO	
Denver, CO	these folks wanted skiing, I don't know enough about it, not easy to get to by air
Greensboro, NC	Client interest, Facilities, Awareness
Greensboro, NC	Not very comfortable
Greenville, SC	Size, Budget Impact, Overall Value
Greenville, SC	lack of knowledge, mileage from destination
Huntsville, AL	Lack of participants in area, had not completed site visit yet, still building up awareness in NC of our company
Kissimmee, FL	Needed a location in Southeast
Lake Oconee, GA	Not considered
Lindenwold, NJ	Recently held one in Mooresville, NC,
Mobile, AL	Did not receive interest from them
Myrtle Beach, SC	Vote of members was to beach, vote of attendees, vote
Myrtle Beach, SC	location, hotel cost, nothing to do
Myrtle Beach, SC	Lack of tourist attraction
Nashville, TN	Nothing to do, unfamiliar with area
Norfolk, VA	Never considered it, No local support, Too small
Orlando, FL	Climate in November, Just not a place that anyone wanted to go.
Orlando, FL	travel cost, travel cost, travel cost
Paris, TN	Travel time for our people to get there, We had so many others cities wanting our event, Not familiar with that areas attractions for our events
Quantico, VA	Was not Considered
Rochester, NY	In market volunteers, Existing infrastructure for the event
Salisbury, NC	No water for bass tournaments
San Antonio, TX	Not familiar with, Accessibility, What is there to do there?
San Francisco, CA	Client wanted a West Coast destination

Section 3: Attractions and Detractions for Meetings and Events

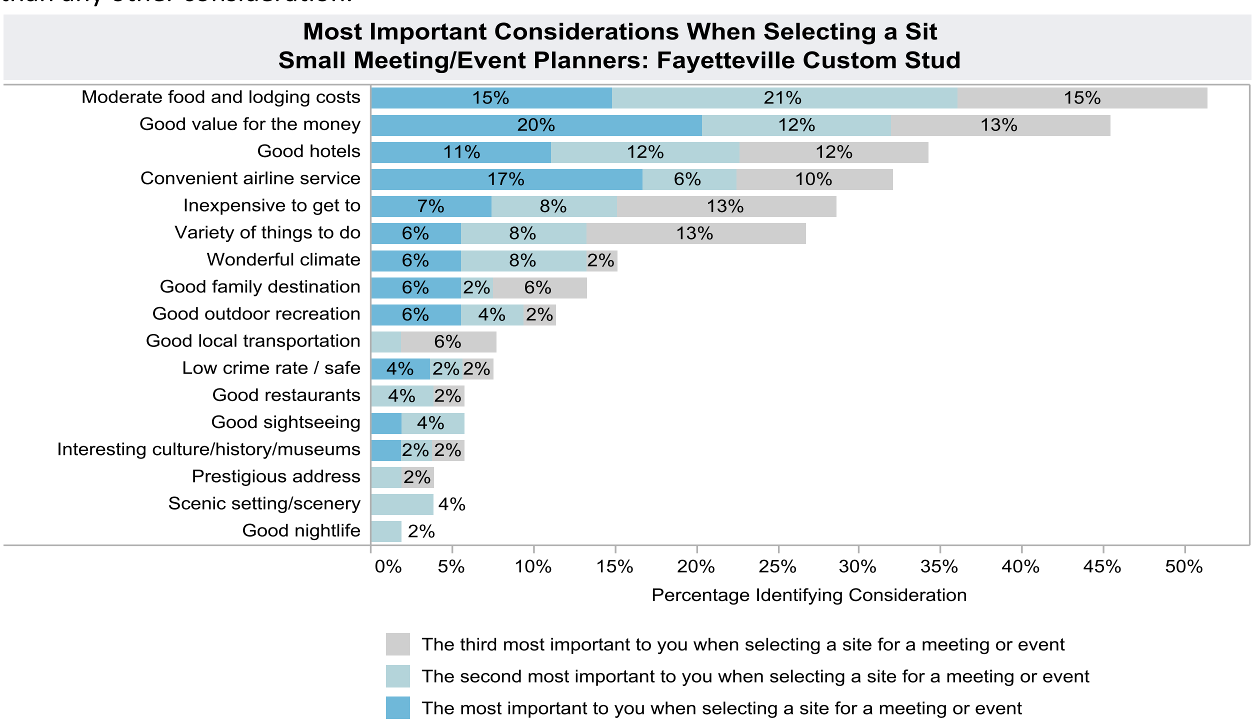
The **DestinationMAP** Custom Study for Fayetteville evaluated travel attributes which are of varying importance to meeting planners. This is similar to areas explored in the DestinationMAP national study, and detailed findings from the national study are provided in the appendix. Because the respondents from the national study may be different from clients and prospects of Fayetteville, a similar set of questions was asked in the Fayetteville Custom Study.

In the Fayetteville Custom Study meeting and event planners were shown a list of different considerations and were asked to rank order the top three most important considerations when selecting a site for a meeting or event. In a subsequent question meeting and event planners were shown a list of detractors and were asked to rank order the top three considerations which would be most likely to cause them to rule out a destination.

This section provides summary graphics and findings from the questions on most important site selection considerations and considerations most likely to cause a planner to avoid a destination.

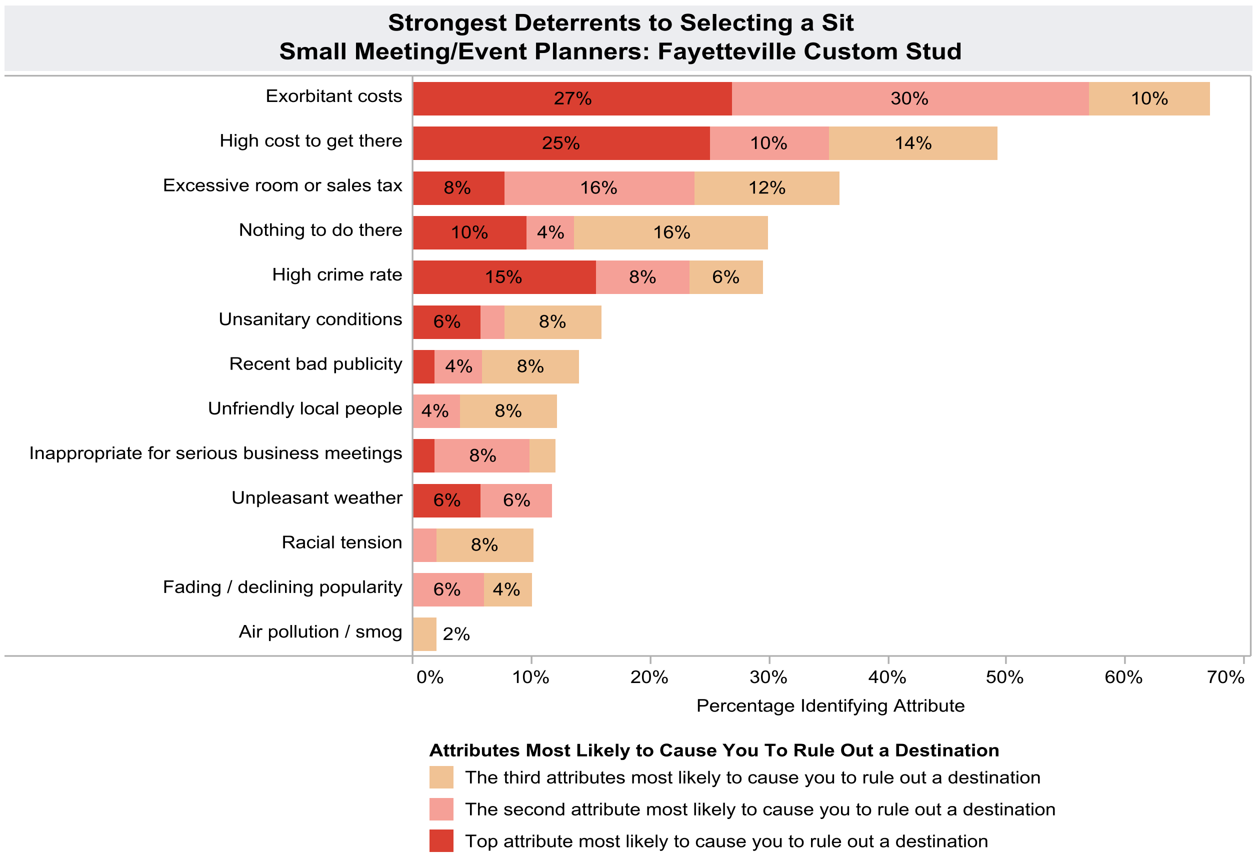
3.1: Fayetteville Custom Study: Site Selection Considerations

In the graphic which follows, meeting and event planners have identified their most important considerations when selecting a site. It is notable that cost considerations make up three of the top five most important considerations. It is also with noting the importance which is placed on perceived good value. More planners rated it their number one most important consideration when selecting a site than any other consideration.



3.2: Fayetteville Custom Study: Deterrents to Site Selection

In addition to listing the top factors which might attract a meeting planner to a destination, respondents to the Fayetteville Custom Study were asked to rank order the top three considerations which might deter them from selecting a destination for their next meeting or event. The top three considerations which were the strongest deterrents were all cost related: "exorbitant costs," "high cost to get there," and "excessive room or sales tax" were the three considerations most likely to cause a meeting planner to rule out a destination.



Section 4: Destination Travel Image

A major component of the **DestinationMAP** Custom Study for Fayetteville is the evaluation of Fayetteville on a set of image attributes, including travel image and negative travel image. Meeting planners evaluated Fayetteville and competitive destinations on each attribute.

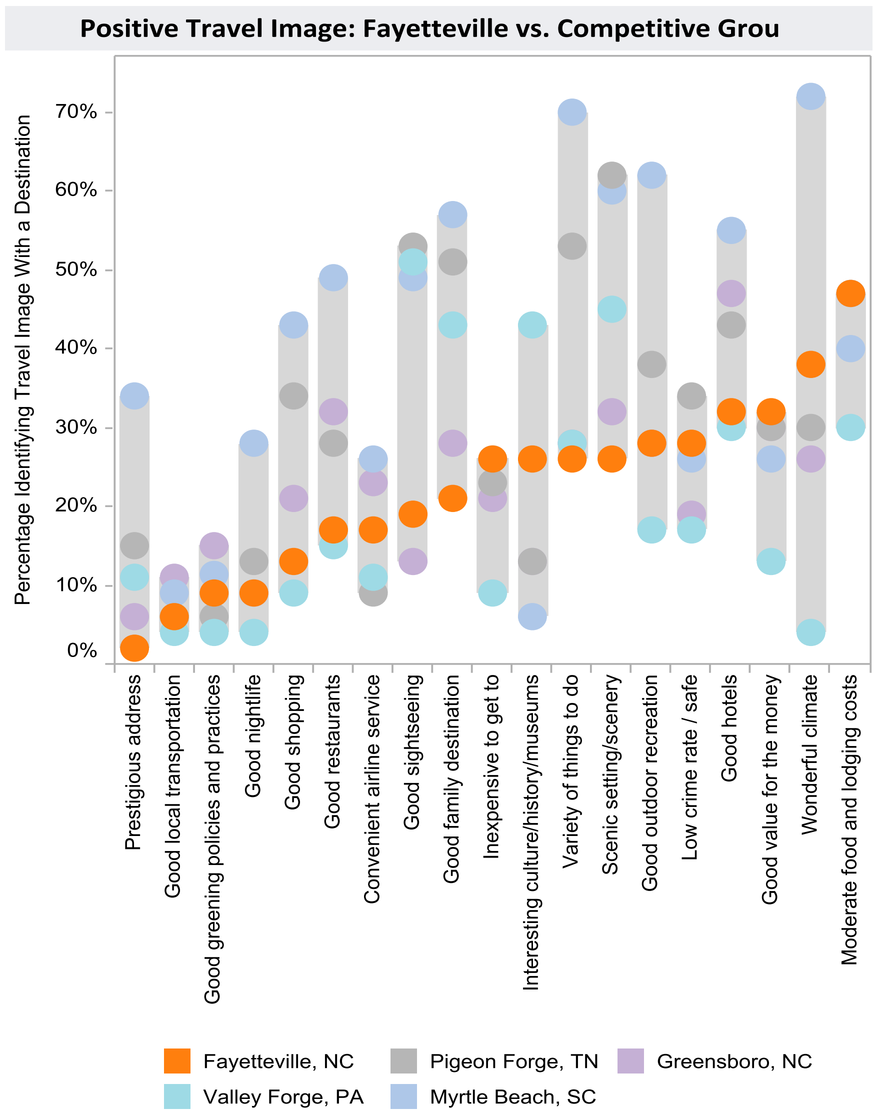
In the Fayetteville Custom Study the competitive destinations evaluated were:

- Greensboro, NC
- Myrtle Beach, SC
- Pigeon Forge, TN
- Valley Forge, PA

The image perceptions of Fayetteville are presented against this competitive set. At times individual destination results are displayed. Additionally, results for Fayetteville are indexed against results from the competitive set. These indices are calculated in the following manner: if Fayetteville is rated favorably on a characteristic by 60% of respondents and the average among competitive destinations for that characteristic is 40%, then Fayetteville will have an index of 60/40 (*100) or 150. When presented graphically, indexes are centered at zero: an index of 150 will appear as 50 in the graphs but 150 in the tables. Generally, an index of 80 to 120 is considered to be normal, or close to average.

4.1: Travel Image Summary: Competitive Set

The image at right presents findings from the Fayetteville Custom Study. Fayetteville was evaluated on a series of travel image attributes, the results of which are shown in the orange dots in the graphic on the right. Also shown are how respondents to the Fayetteville Custom Study evaluated competitive destinations. These destinations are color coded to show how they rate relative to one another. Additionally, the spread between ratings is also shown in the graphic at right to indicate areas where there is large differentiation between destinations or areas where all destinations are perceived similarly.

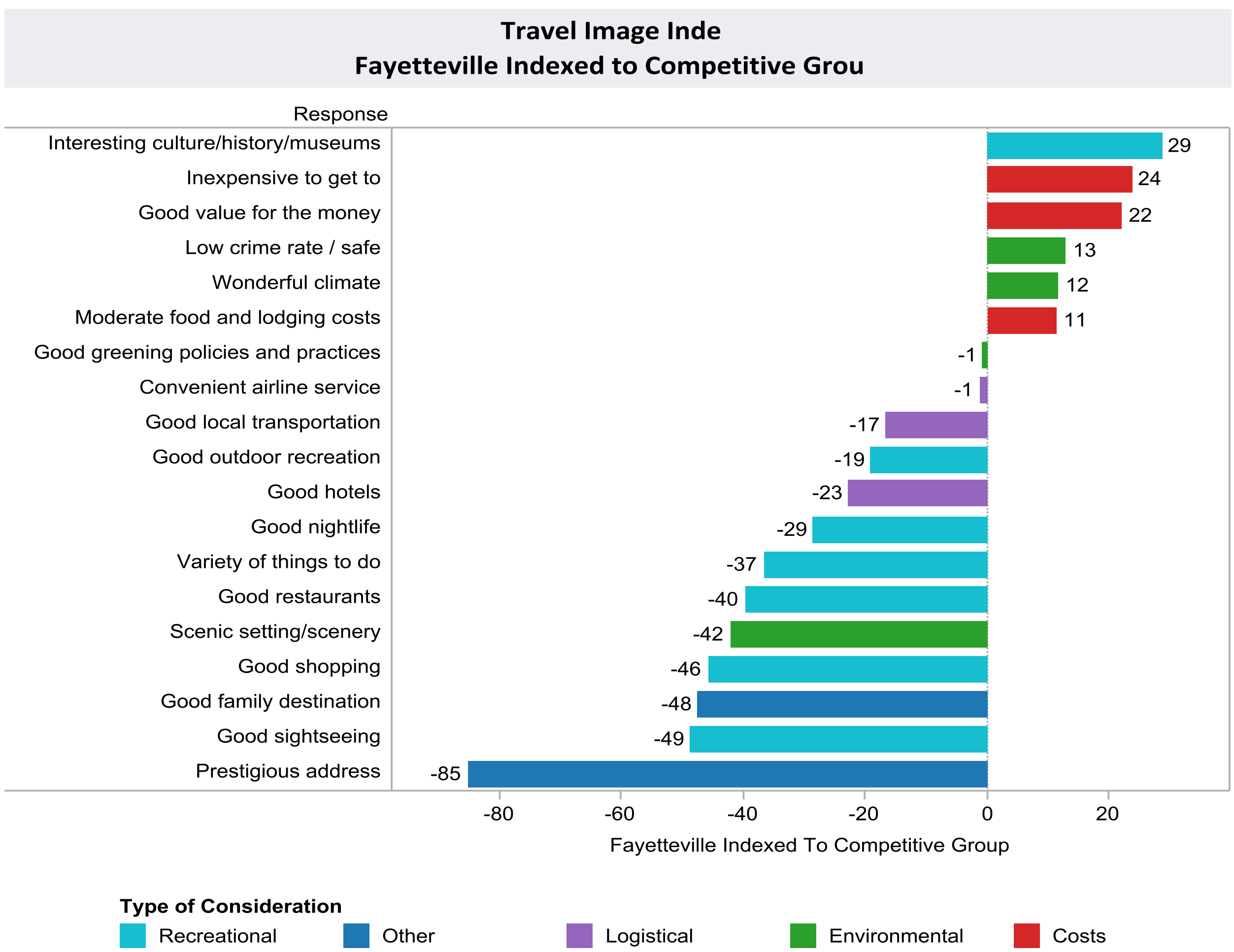


Using this methodology, it is clear to see areas where there is large differentiation between destinations. For “wonderful climate” there is a large difference in how destinations are perceived with Fayetteville falling in the middle. It is notable that for perceptions of offering “variety of things to do," "scenic setting/scenery," and "good family destination" the destinations are well differentiated and Fayetteville tends toward the bottom of the competitive set.

Fayetteville's top strengths are in "moderate food and lodging costs" and "good value for the money" though in both of these cases the competitive destinations are not as widely differentiated as on other attributes. Nevertheless these two considerations are very important to planners as discussed in Section 4.3.

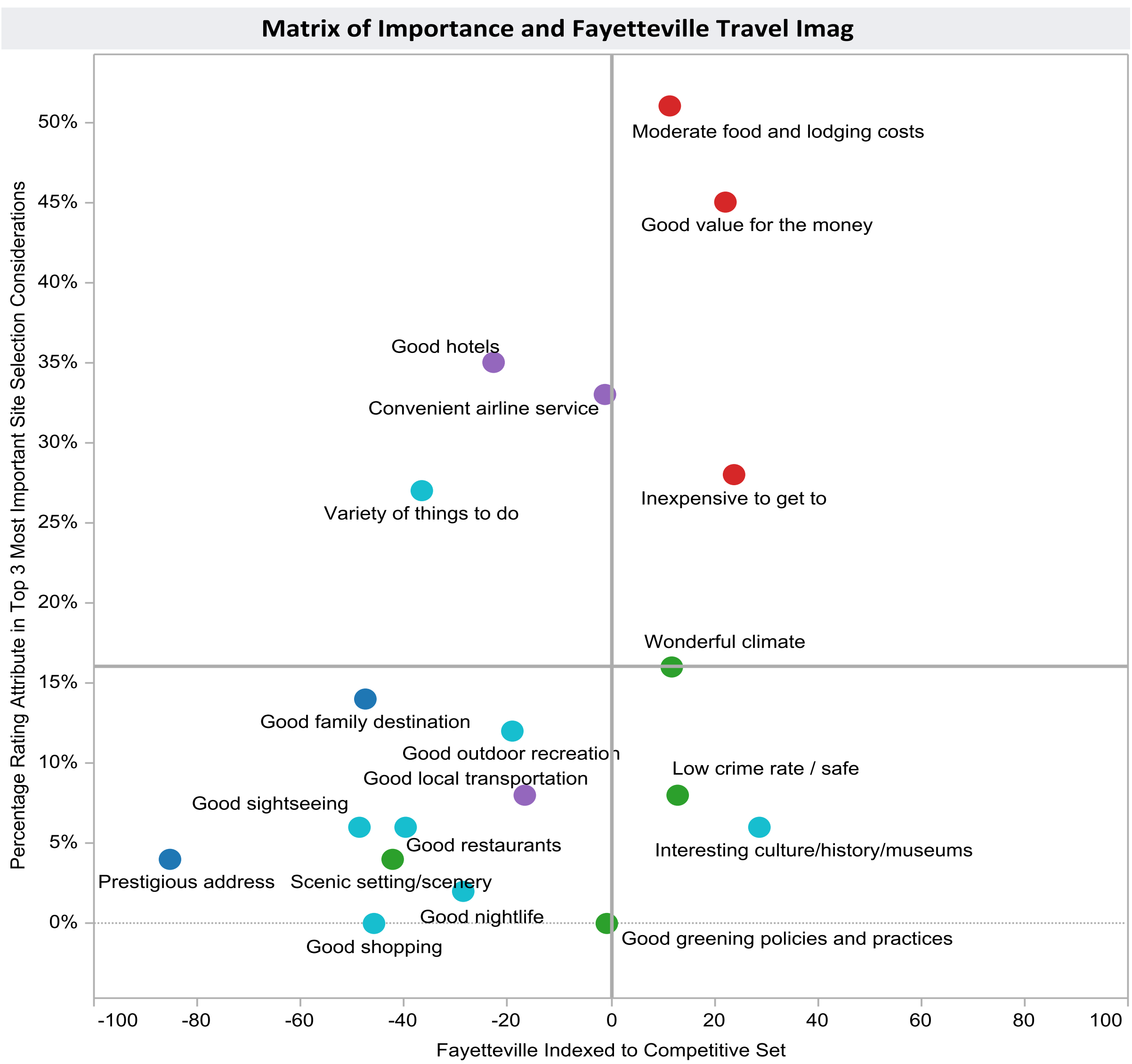
4.2: Travel Image Indexed to Competitive Set

The following table coincides with the preceding graph, and displays results from the Fayetteville Custom Study, indexing Fayetteville's image profile results against the average of competitive destinations. In this case a positive index is desirable and shows that Fayetteville has a positive travel image above the average of competitive destinations. In the image below the various considerations have been color coded into categories. Doing so highlights Fayetteville's strengths among cost considerations and relative weaknesses among recreational considerations.



4.3: Travel Image Performance vs. Importance to Planners

The graphic below combines Fayetteville's index on travel image considerations with the percentage of meeting planners identifying each consideration as one of their top three most important considerations when selecting a site. The benefit of looking at the data in this manner is that it shows how Fayetteville performs on image considerations and how important the image considerations are. In general it is desirable to be in the right quadrants, and most important to be in the upper-right quadrant where a destination is viewed positively on attributes which are most important to planners. Fayetteville achieves this on cost measures. However on "good hotels" and "variety of things to do," attributes which are very important to over 25% of planners, Fayetteville falls below the competitive set average and has a negative index.

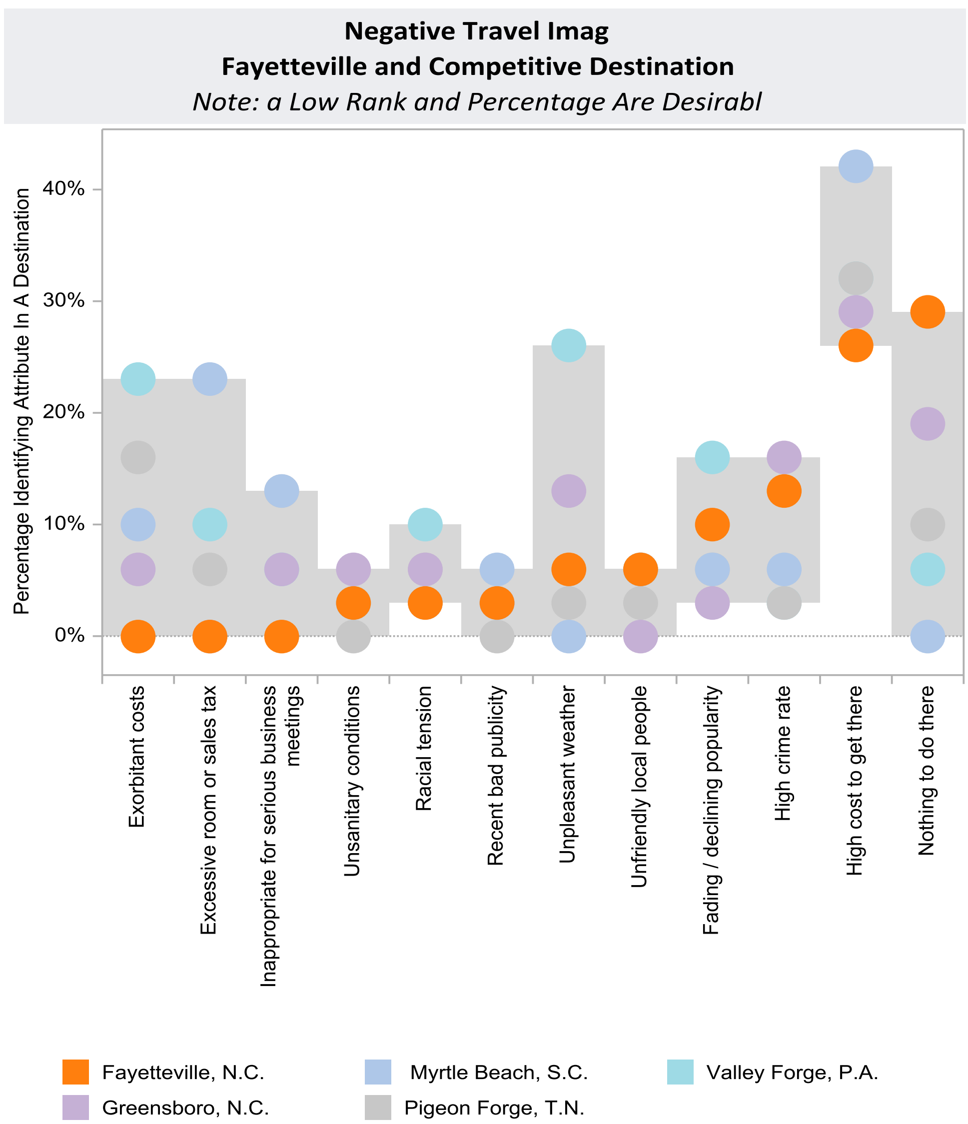


Section 5: Destination Negative Travel Image

The following section examines negative travel image in detail. Negative travel image considerations are those considerations which might cause a meeting planner to avoid a destination. In the negative travel image section the findings from Fayetteville are compared against competitive destinations covered in the Custom Study. This allows Fayetteville to compare how its clients view its detractions against Fayetteville's most competitive destinations. Instead of indexing the results the difference of Fayetteville's ratings is taken from the competitive set average. This metric is used instead of indexing because many negative travel image considerations are only perceived to be a problem by a small number of meeting planners and therefore averages can be very low. Low averages used as a base for indices can overstate the magnitude by which a destination varies from the norm. As is noted throughout the section, on negative travel image attributes a low percentage is desirable.

5.1: Negative Travel Image: Competitive Set

Meeting planners were asked in the Custom Study to indicate whether a destination can be characterized by negative travel image aspects. Because these characteristics are negatives, it is desirable to have a low percentage of planners identifying a characteristic in a destination. Additionally, it is desirable to be far below the competitive destination norm.

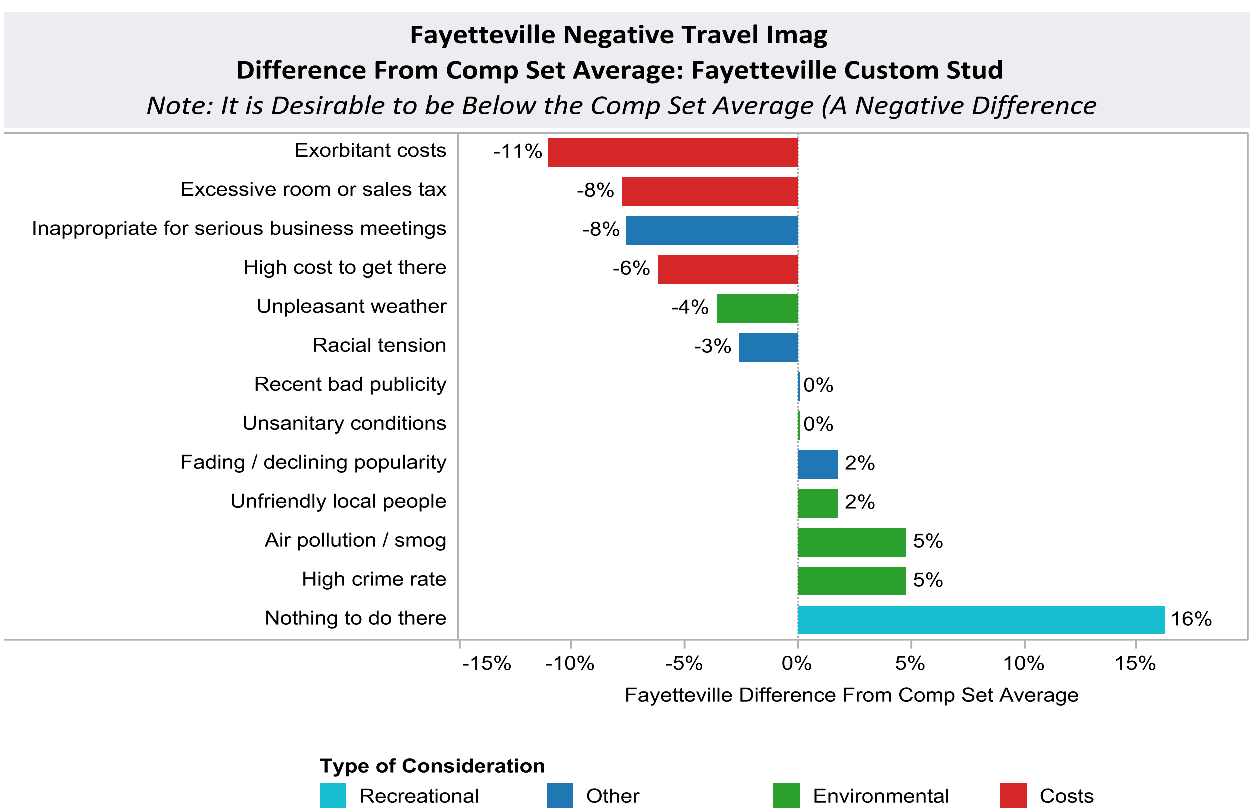


There are two notable characteristics where Fayetteville differs markedly from its competition. Smaller percentages of planners perceive Fayetteville as having "high cost to get there." On the other hand, relative large percentages of planners perceive Fayetteville as having "nothing to do there." This latter perception is something of a concern as there are some competitive destinations, such as Myrtle Beach which no planners view as having "nothing to do there." This attribute shows the highest level of differentiation among the competitive destinations with Fayetteville viewed the most negatively.

5.2: Negative Travel Image: Indexed to Competitive Set

The following graph presents the difference between the percentage of meeting planners associating a negative attribute with Fayetteville and the competitive set norm (comprised of all destinations covered in the Fayetteville Custom Study). This comparison allows the perceptions of Fayetteville's clients to be compared to Fayetteville's most competitive destinations.

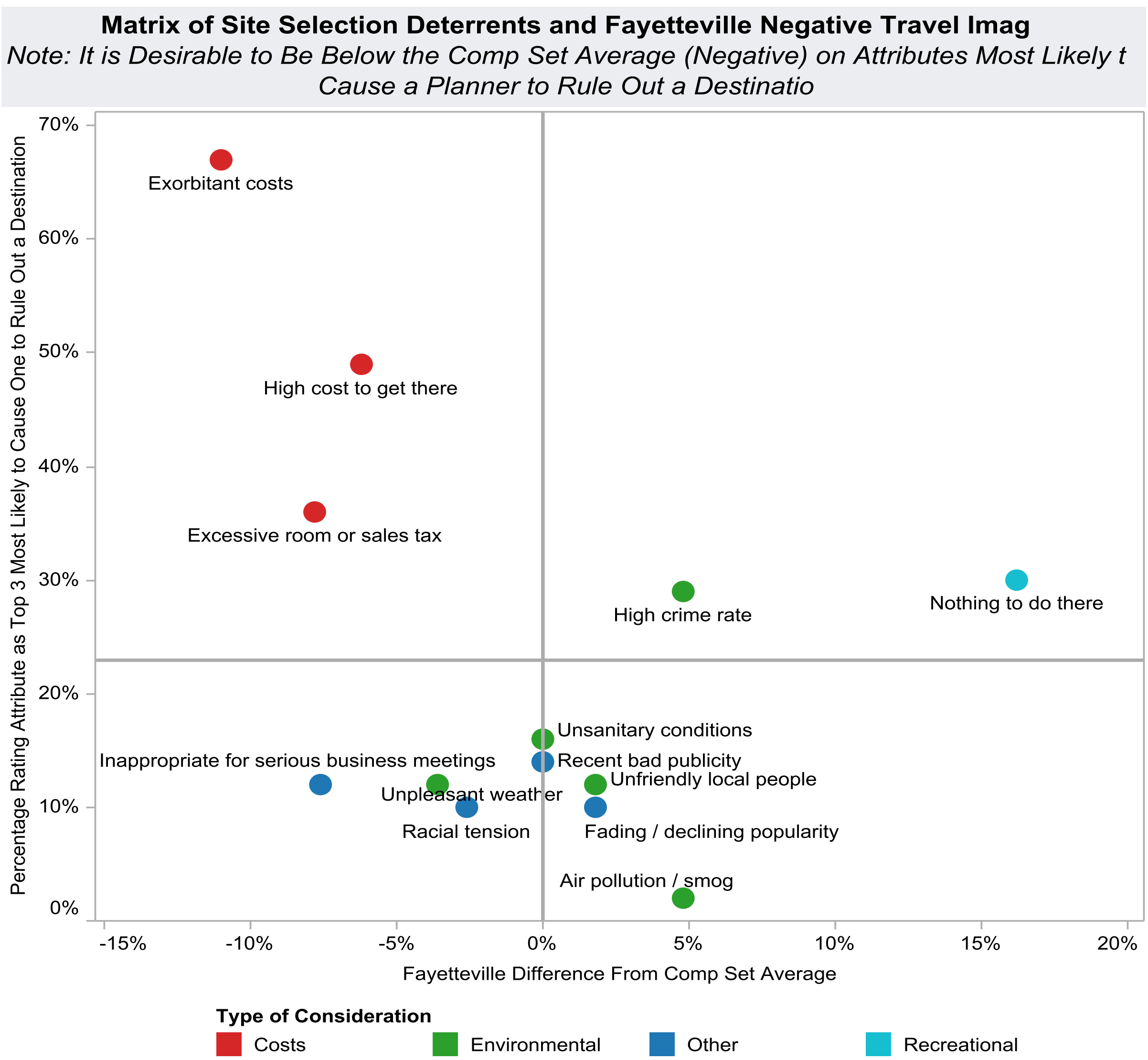
As in the past graph, it is desirable to be below the competitive set average, as this means that planners do not associate negative attributes with Fayetteville. This is achieved for cost considerations and for a few other considerations. However, Fayetteville is perceived slightly more negatively than its competitive destinations for two environmental considerations ("air pollution/smog" and "high crime rate"). Additionally, Fayetteville is considered to be destination offering "nothing to do there" by ten percent more planners than the average competitive destination.



5.3: Negative Travel Image Performance vs. Likelihood to be a Detractor

Looking at how a destination is viewed and how likely certain attributes are to prevent a meeting planner from holding an event can be extremely useful. The following graph presents the difference between the percentage of meeting planners associating a negative attribute with Fayetteville and the competitive set norm (comprised of other destinations covered in the Custom Study) versus the likelihood of a planner to rule out a destination which has a negative attribute.

On the vertical axis it the percentage of meeting planners indicating that an attribute is in their top three attributes which are most likely to cause them to rule out a destination. Across the horizontal axis is the percentage point difference of meeting planners associating a negative attribute with Fayetteville from the custom destination average. In this graph it is desirable to be on the left side of the matrix – and most desirable to be farthest left on the considerations which are higher in the chart. By and large Fayetteville achieves this and is not perceived negatively on most considerations which are likely to cause a planner to rule out a destination, the exception being "nothing to do there."



Section 6: Marketing to Meeting Planners

Meeting planners were asked in the Fayetteville Custom Study to indicate their experience with a destination's marketing efforts in the past 12 months. Detailed findings are provided in the following section. New to **DestinationMAP** are two questions asking meeting planners to identify if they have visited the Facebook page of a destination and if they have followed a destination on Twitter.

6.1: Exposure to Marketing Activities

The Custom Study asked Fayetteville's client list a set of questions about exposure to Fayetteville's marketing efforts. The exposure of Fayetteville's clients to marketing efforts is compared to competitive destinations (Greensboro, NC; Valley Forge, PA; Myrtle Beach, SC; Pigeon Forge, TN). In general Fayetteville shows similar marketing exposure levels to the average competitive destination. Fayetteville has slightly better exposure with its website, though slightly worse exposure through calls from staff and trade book advertisements.

Table 9.
Fayetteville's Marketing Efforts vs. Competitive Set Average

Category	Percent	
	Fayetteville	Comp Set Average
Received direct mail	27%	28%
Saw trade book ads	27	32
Visited website	23	16
Visited trade show booth	23	20
Saw Internet ads	14	16
Called on by bureau staff	11	15
Visited Facebook Page	2	2
Followed on Twitter	0	1

In addition to looking at how Fayetteville compares to the average, it is also useful to see which destinations are the leaders in marketing exposure across various channels. The table below shows the competitive destination which has the highest exposure levels and the percentage of planners who report viewing that destination's marketing materials. In general, Myrtle Beach is the most highly visible destination, with the greatest marketing exposure rates in six of eight categories.

Table 10.
Fayetteville's Marketing Efforts: Top Competitive Destinations

Category	Most Visible Destination	Percent Percentage Viewing Marketing
Visited website	Fayetteville/Myrtle Beach	23%
Called on by bureau staff	Myrtle Beach	21
Visited trade show booth	Greensboro	25
Received direct mail	Myrtle Beach	38
Saw trade book ads	Myrtle Beach	41
Saw Internet ads	Myrtle Beach	29
Visited Facebook Page	Pigeon Forge	5
Followed on Twitter	Greensboro/Valley Forge/Myrtle Beach	2

6.2: Social Media Membership

The Fayetteville Custom Study asked meeting planners about their social media membership. This is an area of marketing which receives a lot of attention; although the data from other **DestinationMAP** studies suggest that meeting planners make limited use of social media for meeting planning.

Fayetteville's clients present a similar picture to the **DestinationMAP** national average, though they are generally more connected to social media across all channels. A significantly higher percentage of Fayetteville's clients (than meeting planners in the national sample) claim to be active members of Facebook, LinkedIn, Google+ and Pinterest. Additionally, Fayetteville's clients appear to be more connected to social media/networks with only 4% reporting that there were members of no social media/networks, as compared to 19% in the national **DestinationMAP** study.

Table 11.
Membership in Social Business Networks
Q. Are you an active member of any of the following social/business networks?

Active Membership In:	Percent of Meeting Planners Active Members Fayetteville Custom Study	 DestinationMAP
Facebook	80%	64%
LinkedIn	65	60
Twitter	51	24
Google+	27	n/a
Pinterest	22	n/a
YouTube	18	14
Foursquare	6	n/a
Not an active member of any social/business networks	4%	20%

Further Information

DestinationMAP is a comprehensive study of meeting planners and the meetings market in North America. The report provides a snapshot of meeting planners, their preferences, and their perceptions of 40 North American destinations. **DestinationMAP** (formerly METROPOLL) was initiated in 1983 and is in its fourteenth reading, which allows for trend analysis of the issues most important to meeting planners.

Additional Inquiries

The **DestinationMAP** data, when coupled with STR data, provide a comprehensive view of meetings to representatives of the hospitality industry. With new techniques and ways of segmenting and visualizing the data there are opportunities to go beyond the topics and details provided in this report. For more specific insights into the nature of the meetings market, the performance of specific meetings in a destination and the preferences of meeting planners, contact us:

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Appendix: Findings from the DestinationMAP National Study: Key Findings from Planners of Small Meetings

The following tables and charts present findings from the DestinationMAP national study of meeting planners and segment meeting planners into two categories: those whose largest meeting in the last 12 months was 300 attendees or less and the overall average response from the whole study.

Findings are presented in three categories: Site Selection Considerations, Deterrents to Site Selection, and Information Sources Used by Meeting Planners in the Site Selection Process. In addition to providing overall measures from those who plan small meetings, the findings also show specific areas where small meeting planners diverge widely from the national norm.

Site Selection: Most Important Factors

Meeting planners were asked in DestinationMAP to identify which attributes were very important in site selection from a list of 28 attributes. The percentages reporting an attribute was "very important" are presented in the following charts. In general, meeting planners who hold small meetings are much like meeting planners who hold larger meeting in that cost, convenience of travel, and quality of hotels are of utmost importance. However there are some areas where smaller meeting planners are different from the norm developed in the **DestinationMAP** national study. Recreational attributes such as "variety of things to do" and "good place to take family" are more important to planners of small meetings while "proximity to a convention center" and "support of a CVB" are less important to planners of small meetings.

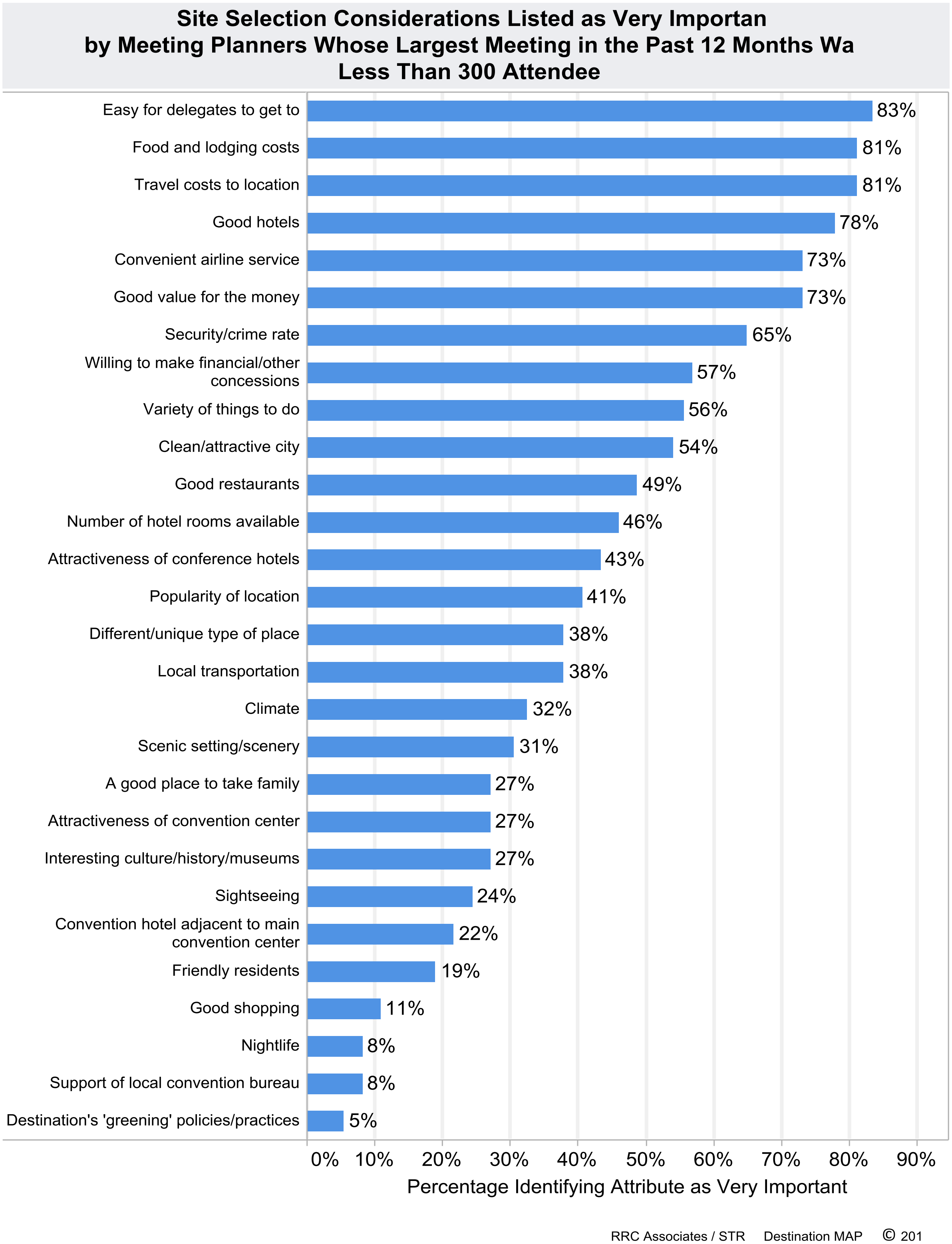
Deterrents to Site Selection

Among planners of small meetings, costs, unsanitary conditions, and an unsafe city are the items most likely to deter the meeting planner from selecting a site for a meeting. Relative to the DestinationMAP norm, planners of small meetings are quite similar in what they believe will deter them from selecting a site. One notable difference is that small meeting planners appear to be much more sensitive to negative publicity stemming from the hangover of the "AIG effect."

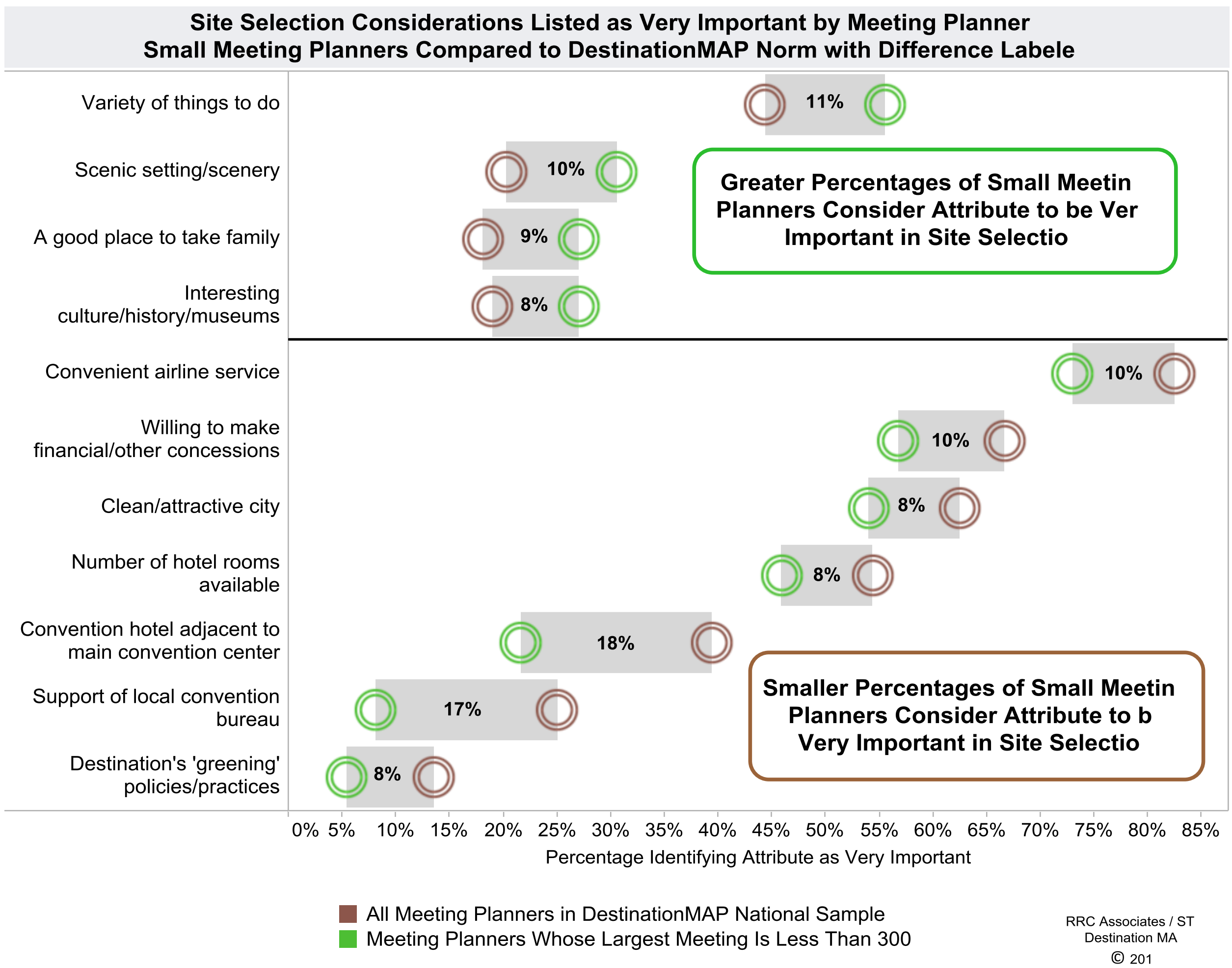
Information Sources Used in Site Selection

In general planners of small meetings find attendee feedback, past experience, and destination websites to be the most useful information sources when selecting a meeting site. Destination web sites and Hotel User Review Web Sites are more important to planners of small meetings than planners in the DestinationMAP norm.

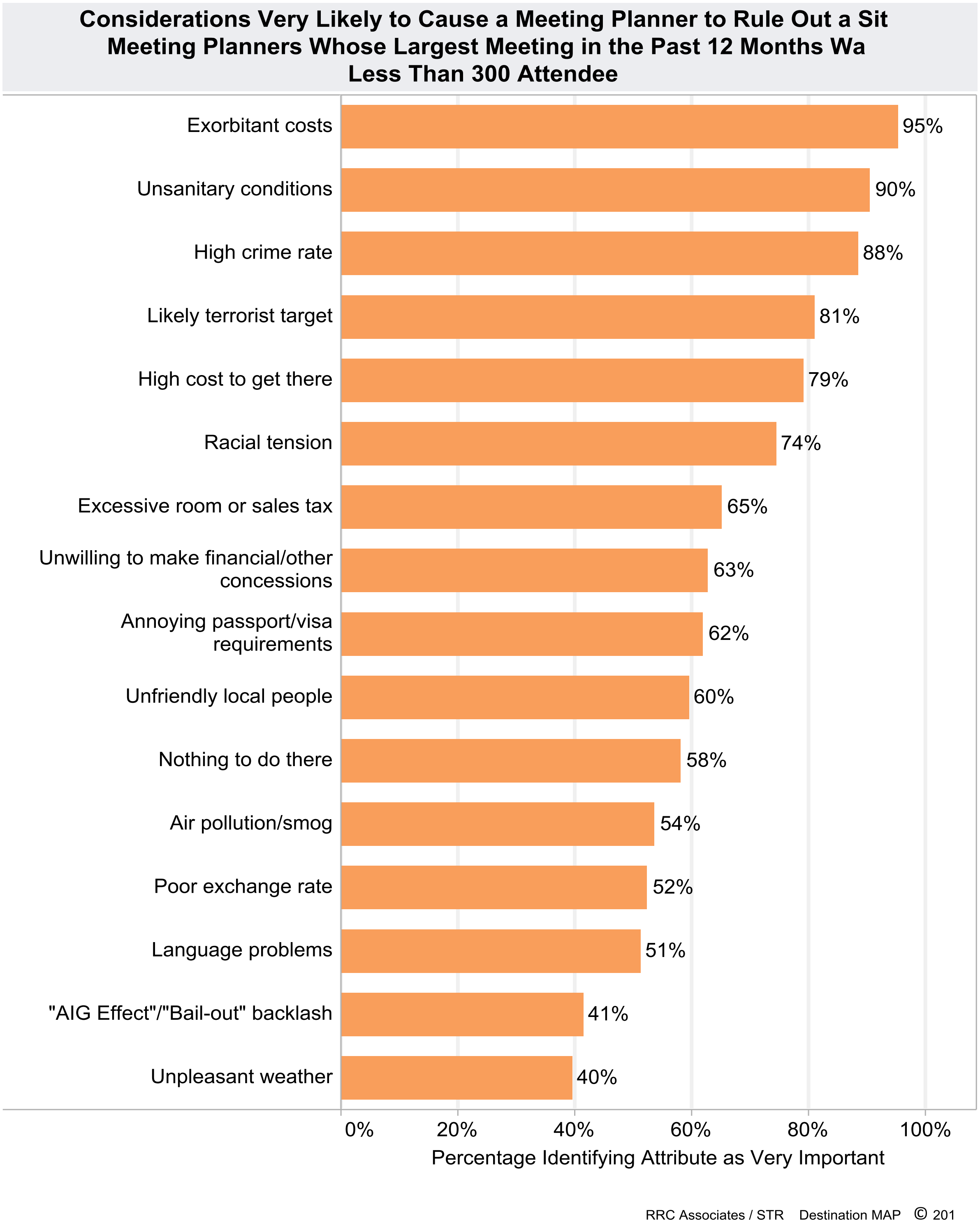
Site Selection: Most Important Factors



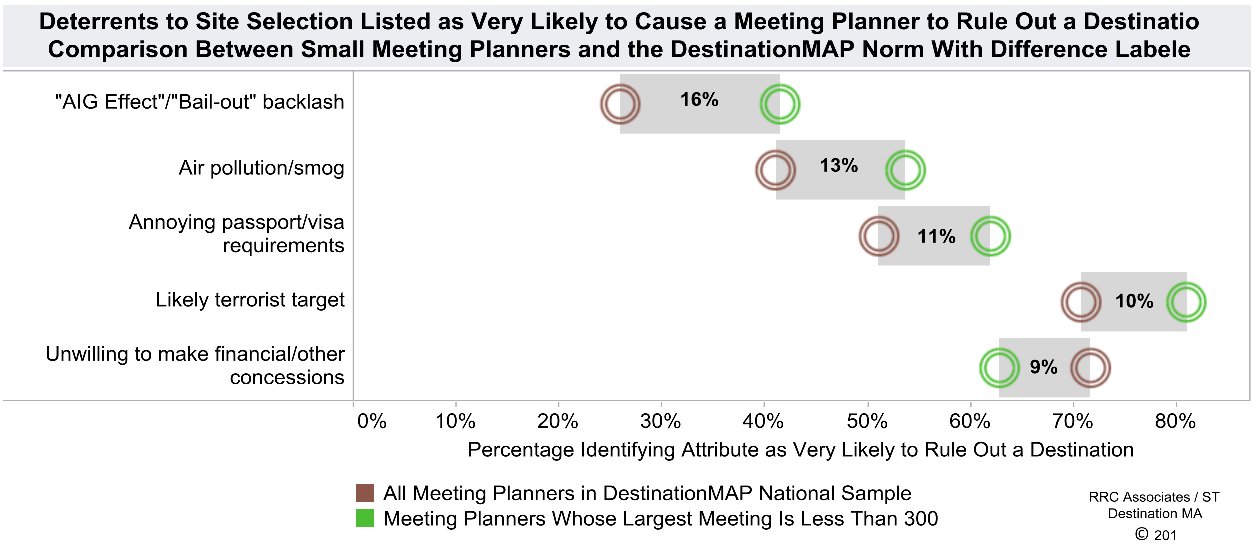
Site Selction:
Difference Between Planners of Small Meetings and DestinationMAP Norm



Deterrents to Site Selection



Deterrents to Site Selection:
Difference Between Planners of Small Meetings and DestinationMAP Norm



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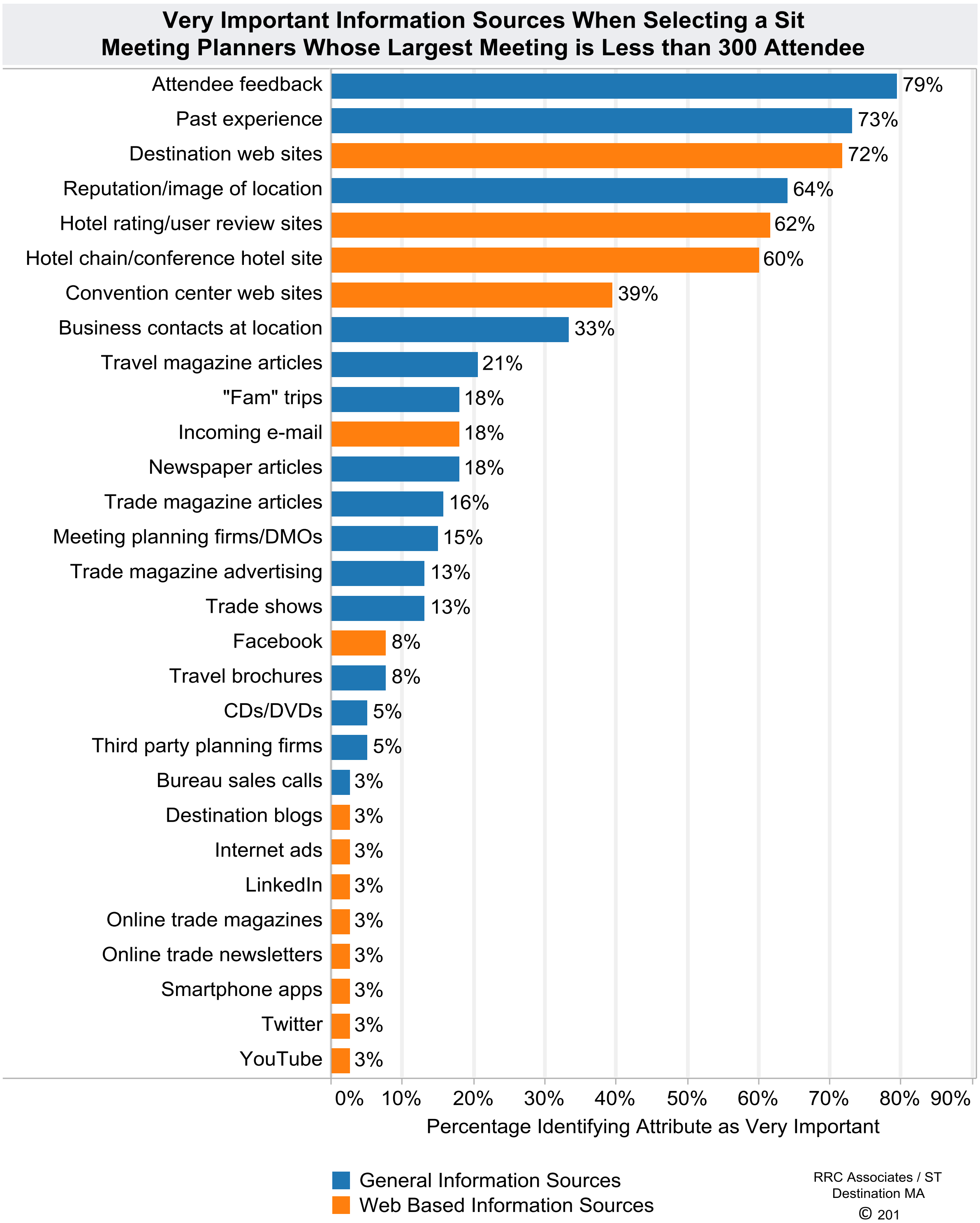

Information Sources Used in Site Selection :
Difference Between Planners of Small Meetings and DestinationMAP Norm