

Fayetteville, NC/Cumberland County Visitor & Market Study

Prepared for Fayetteville,
NC/Cumberland County Area
Convention & Visitors Bureau

Delivered June 2023

THE CLOSEST TO THE CUSTOMER WINS.



Project Overview

Purpose. The purpose of conducting the Fayetteville, NC/Cumberland County Visitor and Market Study is to amplify the voice of the regional marketplace by measuring Fayetteville, NC/Cumberland County's brand health as a destination and contextually comparing it among other regional destinations of similar size and scope. This study explores regional traveler sentiment, measures the destination's brand health, provides insight into the Fayetteville, NC/Cumberland County visitor profile, examines barriers to visitation and provides a demographic/behavioral profile of visitors and non-visitors.

Target Audience. This quantitative survey was conducted among a professionally managed panel of travelers living within 250 miles of Fayetteville, NC/Cumberland County who were familiar with the destination and have either visited or are open to visiting the area.

Sample. A total of 800 interviews were completed for this study, providing a maximum margin of error of $\pm 3.5\%$ at a 95% confidence interval.

Key Takeaways

Pages 4-6

01. Traveler Sentiment

Pages 7-11

02. Brand Health

Pages 12-25

03. Visitor Profile

Pages 26-44

04. Barriers to Visitation

Pages 45-48

05. Categorization

Pages 49-53

Key Takeaways

- **Patriotism Differentiates.** Fayetteville, NC/Cumberland County's branding has aligned well with its brand perception. The area continues to be most differentiated by its patriotism and history. However, patriotism is not the driver of most visits, as fewer than half of travelers indicate this is one of their most desirable characteristics when considering a destination to visit.
- **Historical, Friendly & Affordable.** The adjectives that regional travelers are most likely to use to describe Fayetteville, NC/Cumberland County are historical, friendly, affordable, welcoming and down-to-earth. This varies little among People of Color; however, People of Color consider the area more diverse and welcoming than non-Hispanic whites (+7 pts and +5 pts, respectively).
- **Strong Social Media Recall.** More than one-quarter of recent Fayetteville, NC/ Cumberland County visitors recalled having seen a social media post that inspired a trip to the area, higher than any other medium evaluated. However, fewer than one in ten indicated that they followed any of the area's official social media accounts. So, while social media marketing is inspiring visits, travelers aren't necessarily investing in keeping up with the area long-term.
- **Visitor Profile.** On average, visitors are 45.7 years old and half visited with kids in tow on their last trip. More than six in ten (62%) spent at least one night and enjoyed an average stay of 2.5 nights, on par with 2021.

Key Takeaways

- **Strengths & Concerns.** Fayetteville, NC/Cumberland County is a destination with a variety of strengths including friendly locals, numerous historic sites, breathtaking scenery, and a great environment for spending time with friends. Despite this, some feel it lacks the ability to stand out among other destinations or offer unique, positive features. While the area excels in celebrating the American Spirit and serving as a home for military families, some concerns include limited culinary experiences, little opportunity for rest and relaxation, lack of value for money, and a shortage of things to see and do. Likewise, few seem to view the area as a repeatable experience, which is reflected in a lower-than-average retention rate.
- **Compelling Area Activities & Attractions.** Regional travelers tend to gravitate towards a variety of activities and attractions in Fayetteville, NC/Cumberland County. The top five pursuits include shopping, exploring the downtown/urban area, immersing oneself in military and history sites, enjoying outdoor recreation, and visiting museums in general. While no one attraction reigns supreme, the most popular individual branded experiences include the Fayetteville History Museum, the Airborne Special Operations Museum, and the Cape Fear Botanical Garden.
- **Barriers.** This study also delved into the reasons why some people have not previously visited Fayetteville, NC/Cumberland County. H2R explored both stated and derived barriers and identified several notable obstacles. The top challenges include travelers preferring other destinations, no must-see attractions in Fayetteville, general lack of brand awareness, nothing new to experience, and a shortage of recommendations from peers and relatives.

Strategic Implications

- **Things don't change over night.** It takes time for a new brand to take hold. Continue marketing your new brand and messaging, slowly but surely the new will replace the old.
- **Narrow the Focus.** Messaging is key to effectively reaching the target audience. Rather than spreading multiple messages and brand associations across a limited budget, Fayetteville, NC/Cumberland County may wish to pursue one clear and simple brand message that helps to cut through the clutter in the marketplace.
- **Advocacy: Harnessing the Power of Word of Mouth.** Consumers have less trust in advertising and government today than ever, but they still tend to trust each other. Online reviews from trusted sources can carry significant weight, and word of mouth generates customers with lifetime values reportedly worth four times that of other advertising methods. Fayetteville, NC/ Cumberland County may want to consider identifying and supporting their brand promoters, providing them with the resources to help spread the word and amplify the message.
- **Fayetteville Could Use a Unique Must-See Experience.** Fayetteville, NC/Cumberland County boasts a multitude of attractions and activities, but most are not necessarily unique to the area. To stand out from the crowd, the area an attraction, activity, or experience that is different from anything else and catches the eye of travelers. This doesn't have to be extravagant or costly, but it must be unique, compelling, and/or "share-worthy" to create buzz and give travelers a reason to visit and return. Given that the area already owns patriotism and the American Spirit, some consideration might be given to hosting the largest July 4th event in the state or something along those lines.

01. Traveler Sentiment

ALL RESPONDENTS | N=800

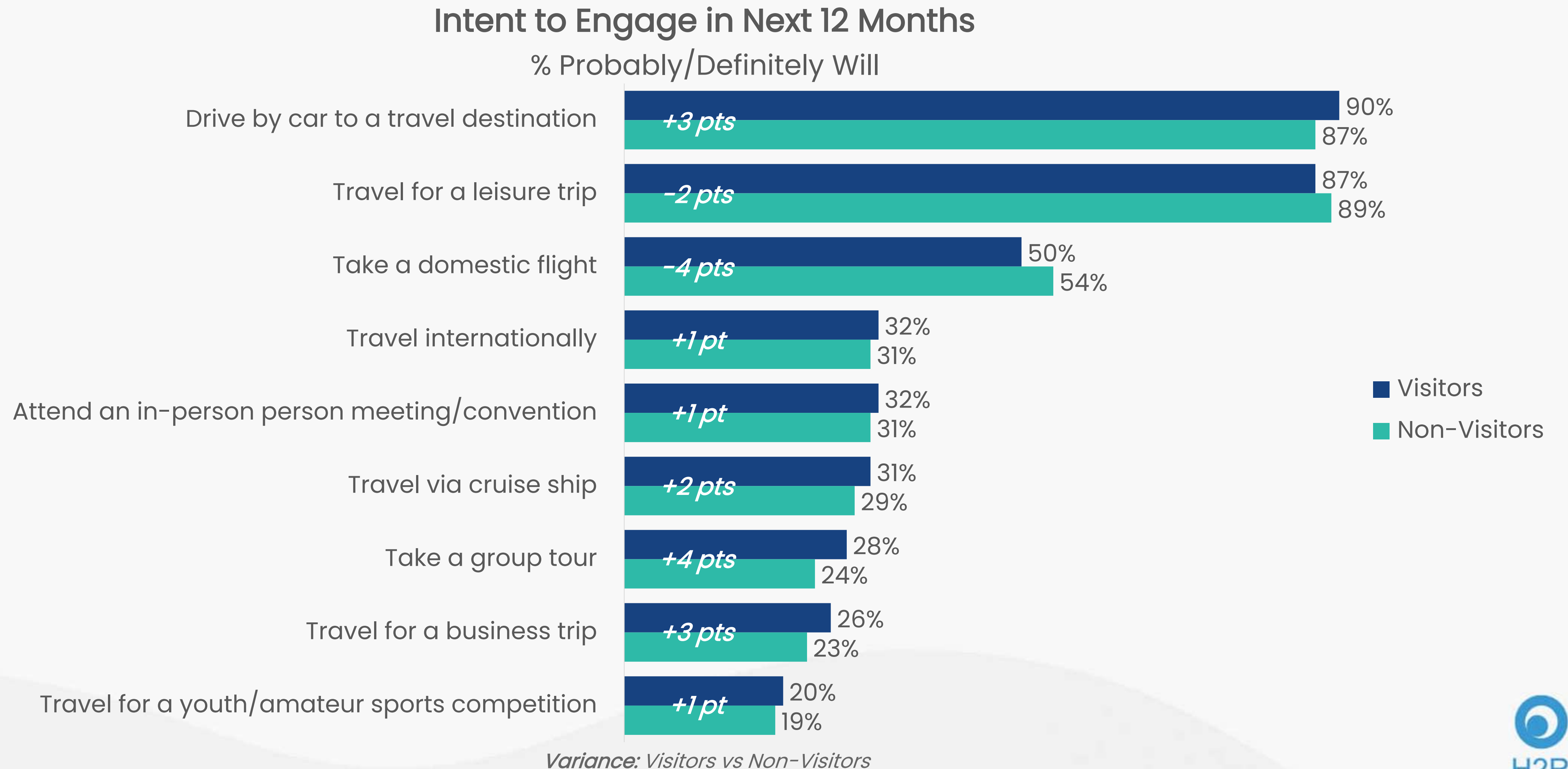
02. Brand Health

03. Visitor Profile

04. Barriers to Visitation

05. Categorization

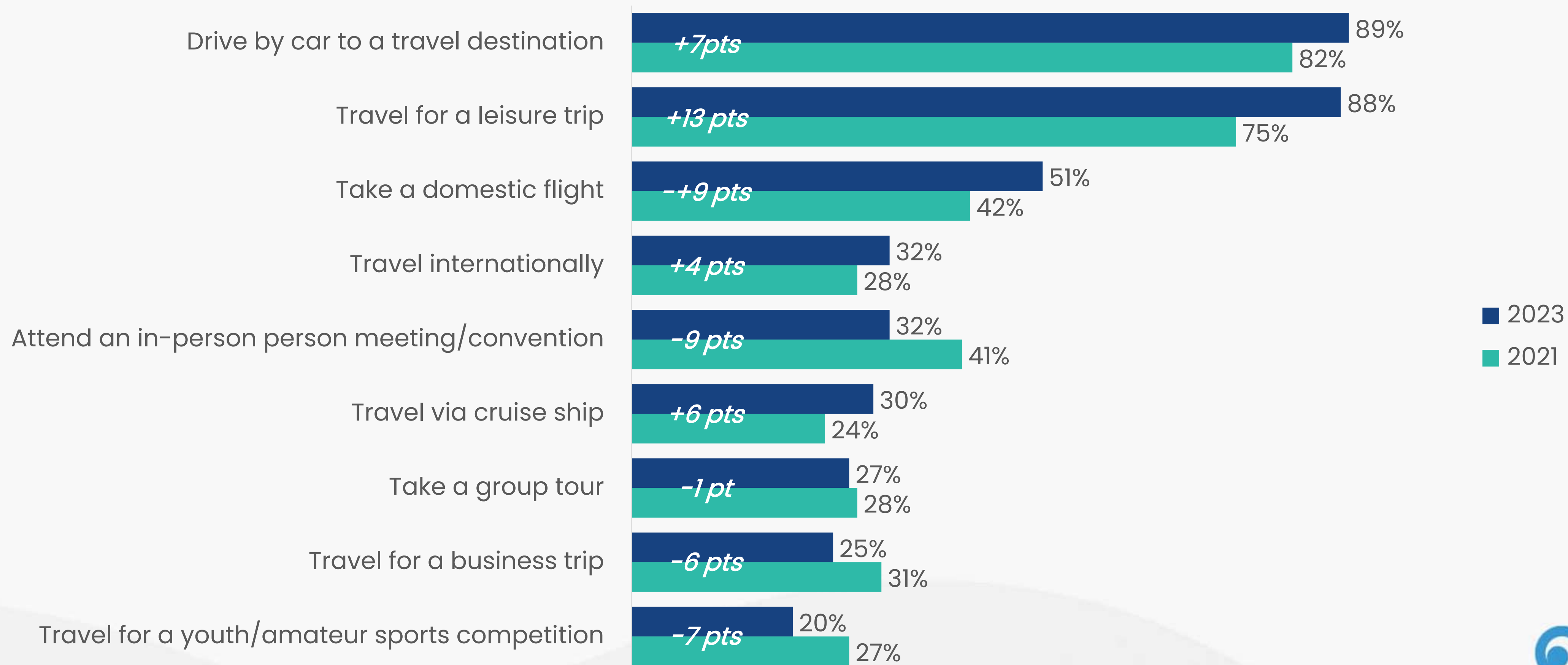
Nearly nine in ten regional travelers plan to travel for leisure in the next 12 months and primarily by car. However, select types of travel (business, international, group tours, cruise ships, etc.) all have levels of intent that run much lower.



Intent to travel for leisure has increased greatly (+13 points) across the region over the past 2 years as has intent to take a domestic flight (+9 points) and intent to travel by car (+7 points).

Intent Variance, 2023 vs 2021

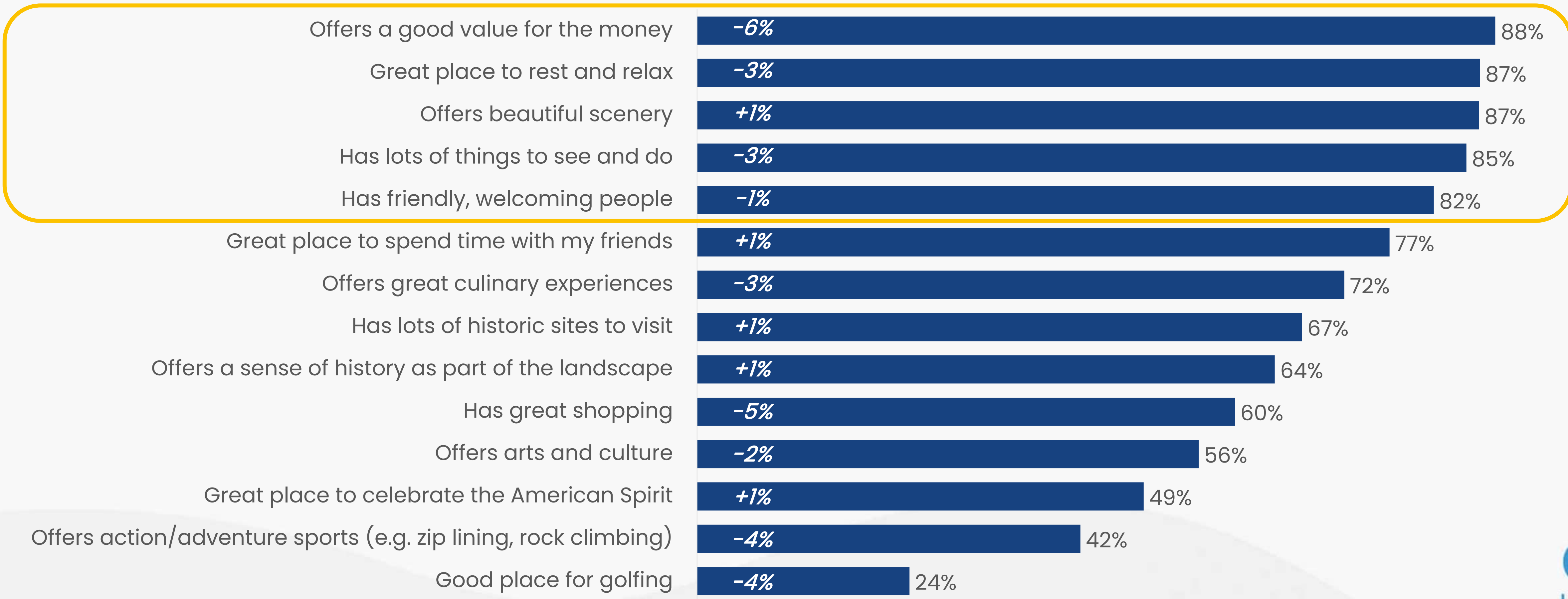
% Probably/Definitely Will



Variance: 2023 vs 2021

The most important attributes regional travelers consider when evaluating a regional destination are value, relaxation, scenic beauty with lots of things to see and do along with welcoming people.

Attributes/Characteristics Important When Considering a Destination Visit
% Very/Extremely Desirable

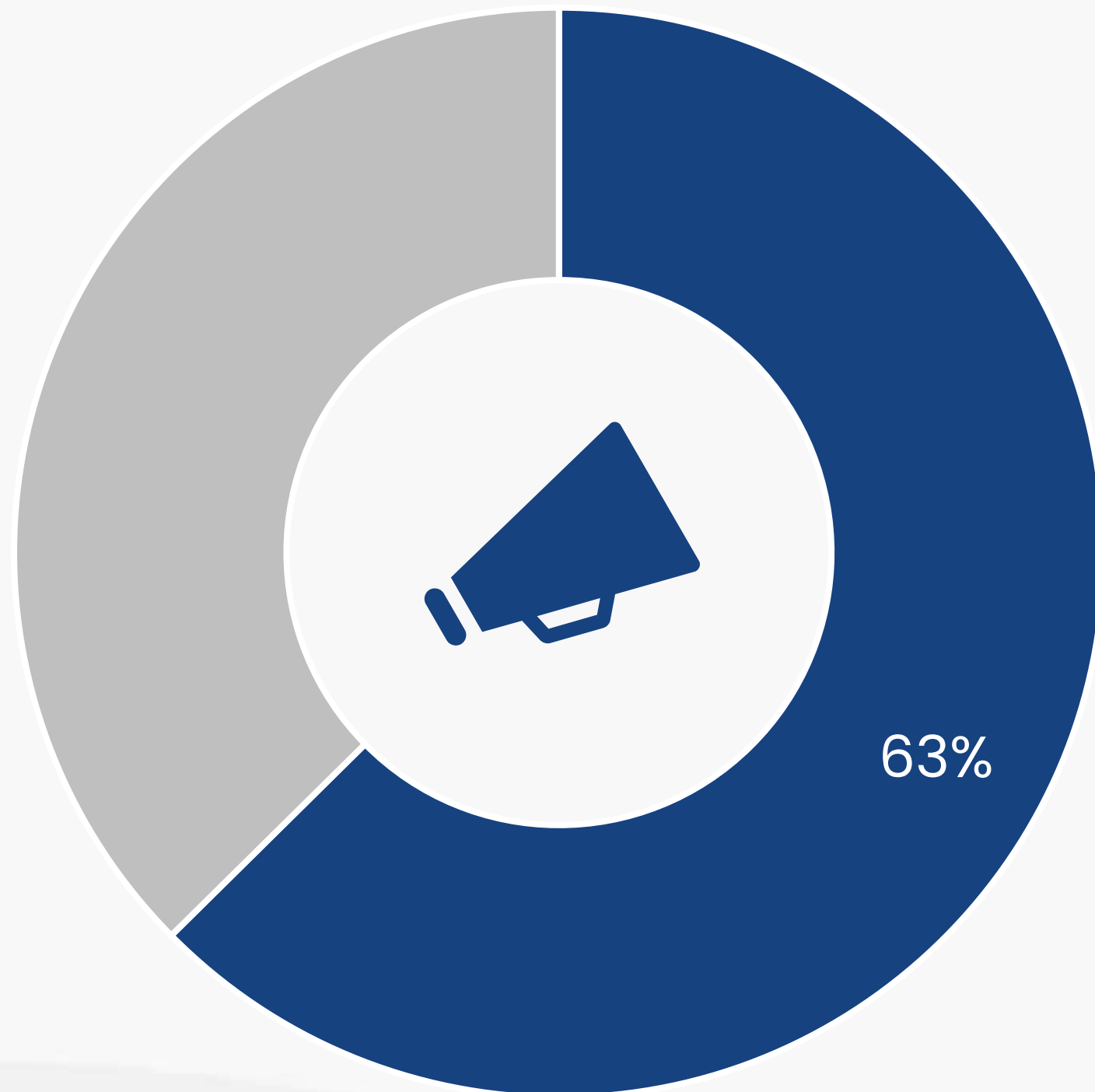


Variance: 2023 vs 2021

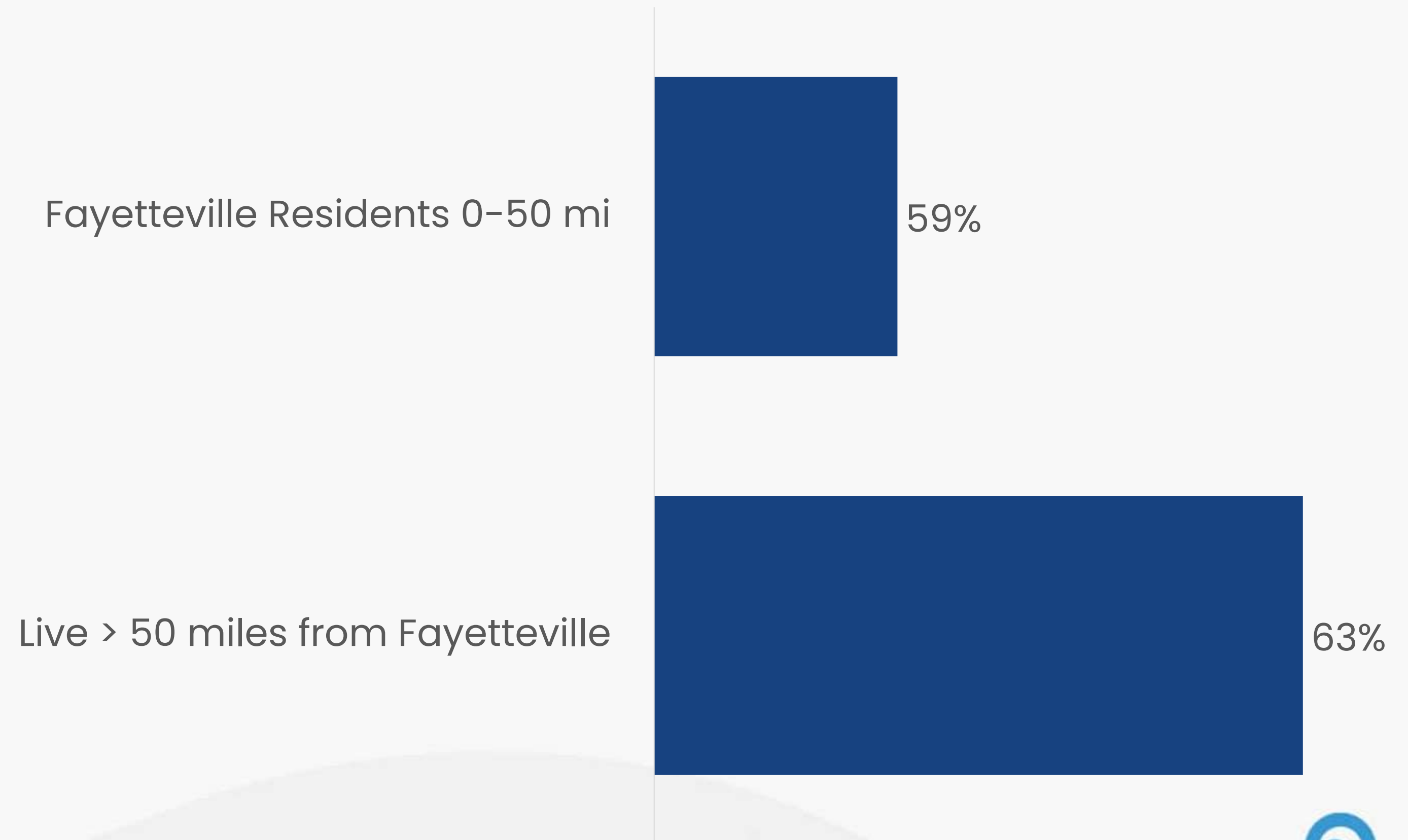


Overall, 63% of regional residents are proud of the communities where they live. This ratio dips lower (59%) among Fayetteville residents than it does among tourists and how they feel about where they live (63%).

Resident Pride – All Travelers
% Very/Extremely Proud



Resident Pride – Fayetteville Residents vs Tourists



01. Traveler Sentiment

02. Brand Health

FAMILIAR WITH DESTINATIONS | N=VARIES BY DESTINATION
FAMILIAR WITH FAYETTEVILLE | N=800

03. Visitor Profile

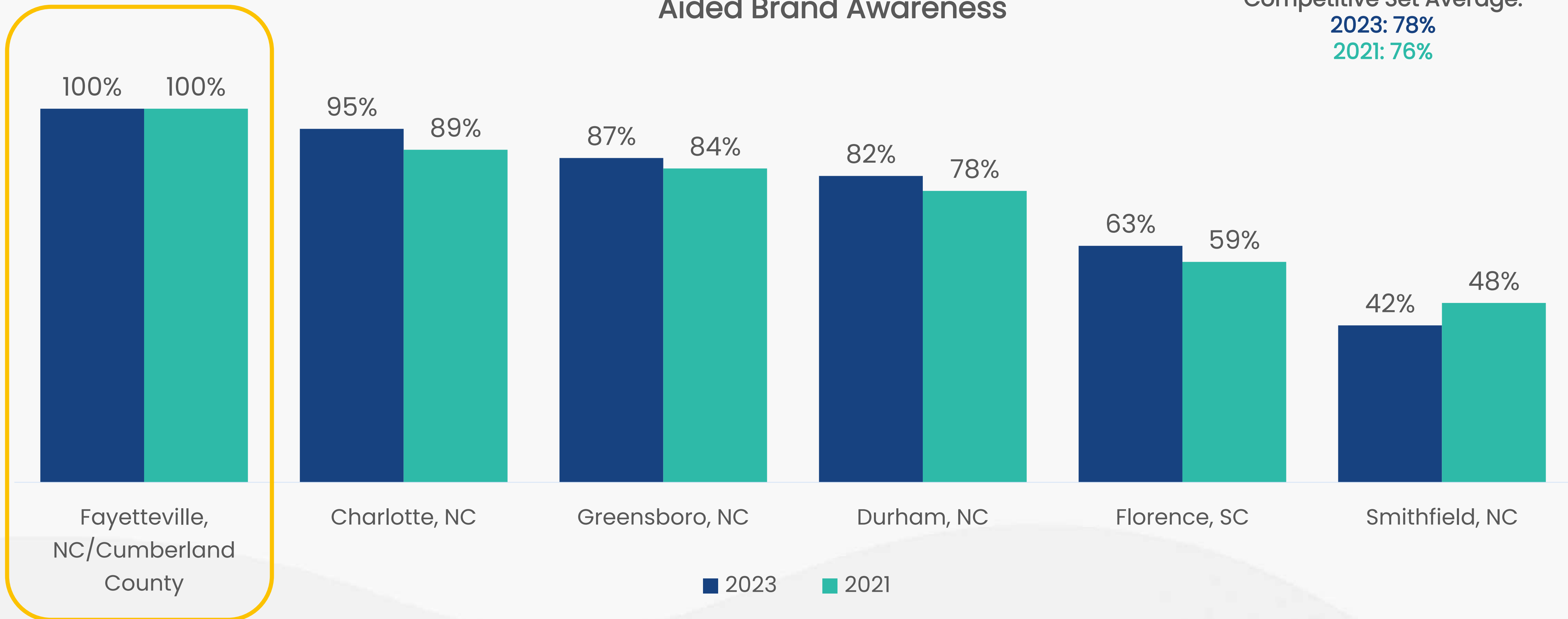
04. Barriers to Visitation

05. Categorization

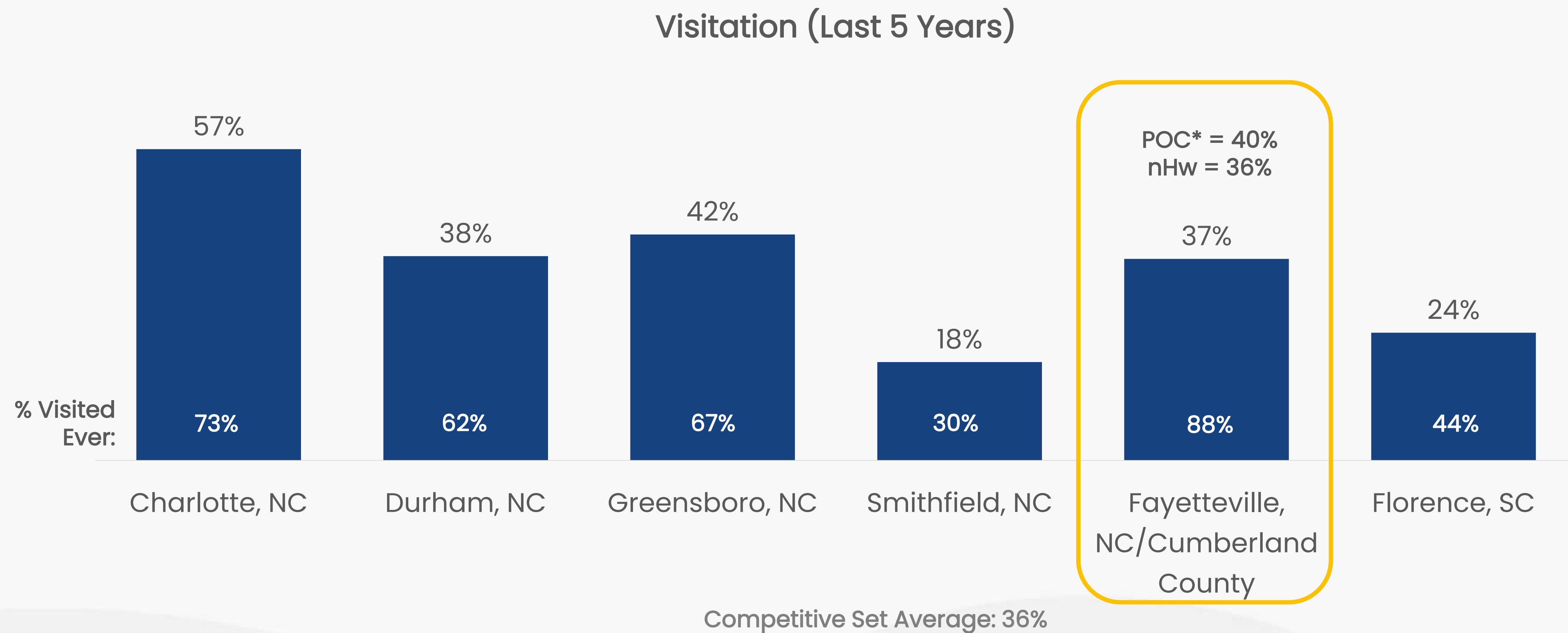
All travelers were required to be familiar with Fayetteville, NC/Cumberland County to qualify for this survey. Most are also familiar with Charlotte and Greensboro.

Aided Brand Awareness

Competitive Set Average:
2023: 78%
2021: 76%



Nearly nine in ten (88%) regional travelers have visited Fayetteville, NC/Cumberland County previously, and 37% have visited in the past 5 years, both above comp set averages.

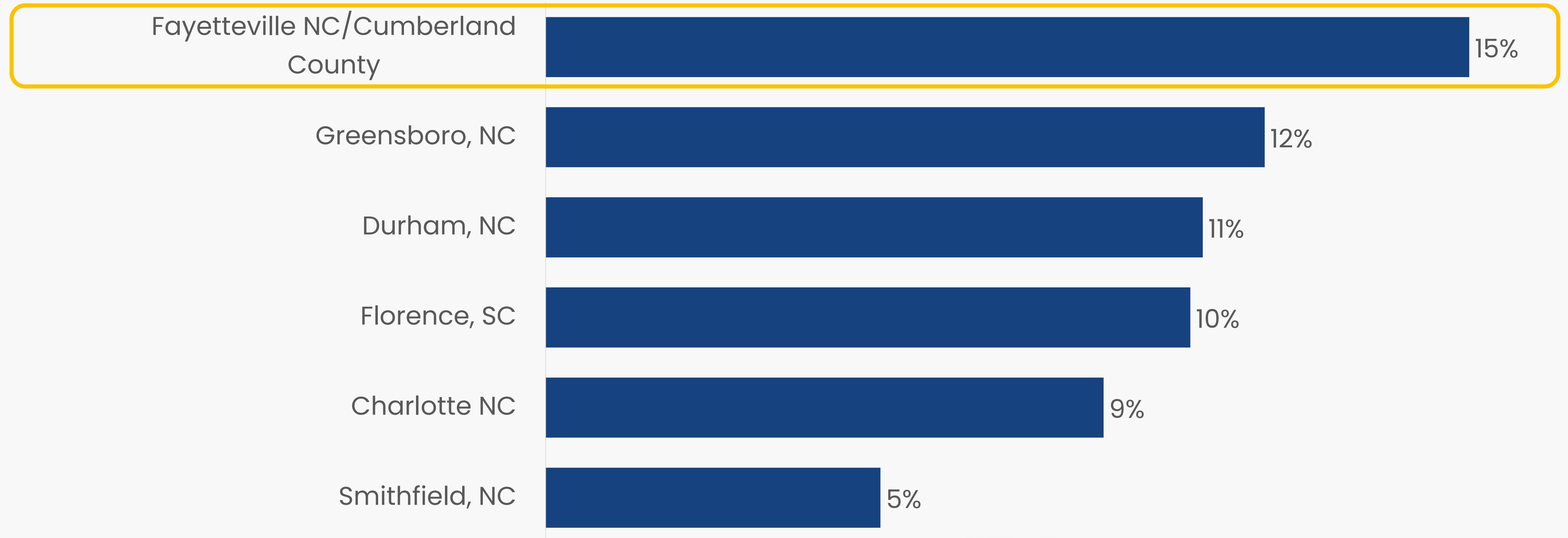


*POC = People of Color
nHw = non-Hispanic white



Fayetteville, NC/Cumberland County has a comparably large consideration set of prospects (15%), those who've considered visiting but have not found reason to do so yet.

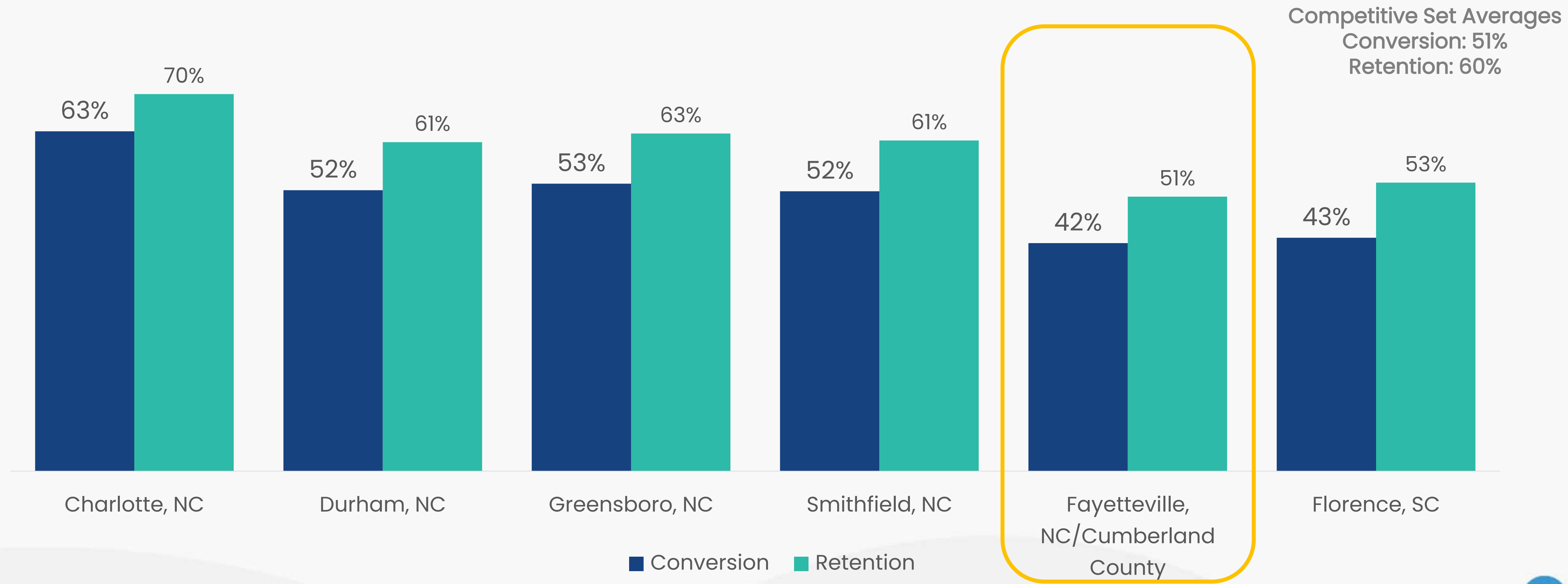
% Considered Visiting But Have Never Visited



Competitive Set Average: 10%

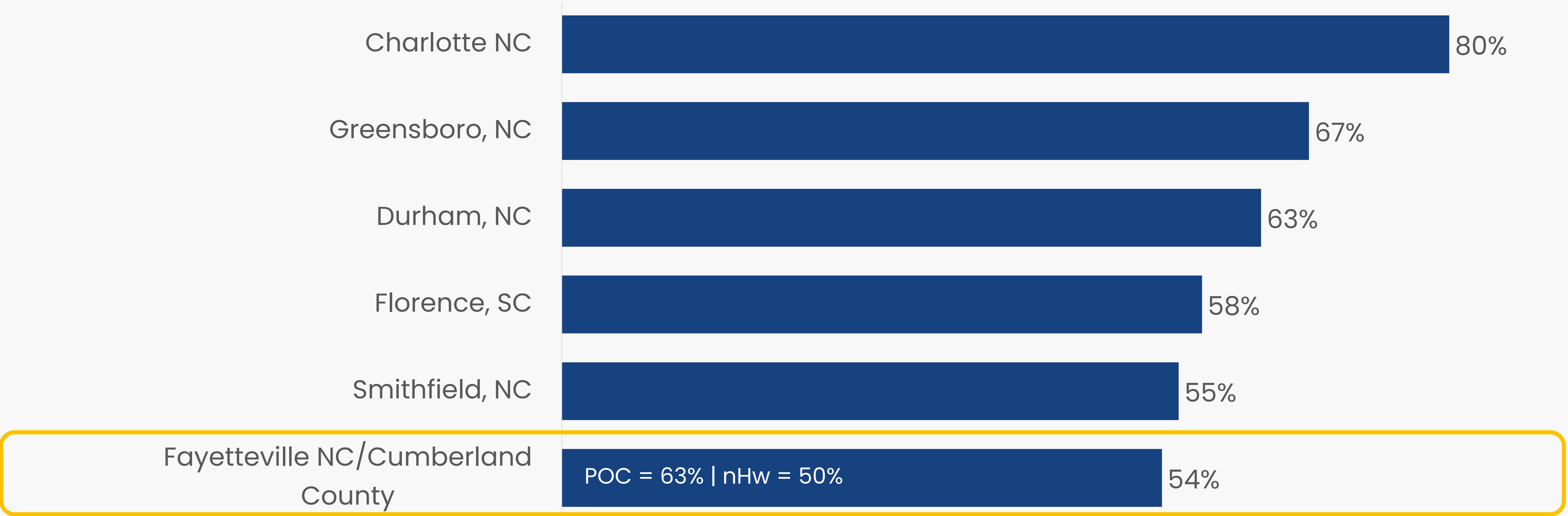
Fayetteville, NC/Cumberland County's conversion and retention rates fall below average due to a lower ratio of recent visitors.

Conversion & Retention Rates*



While Fayetteville, NC/Cumberland County's reputation is reasonably good at 54%, it trails the competitive set average and H2R's Norm. However, Fayetteville's reputation increases significantly among People of Color (POC).

Opinion/Reputation of Competitive Set Destinations
% Somewhat/Very Positive Opinion

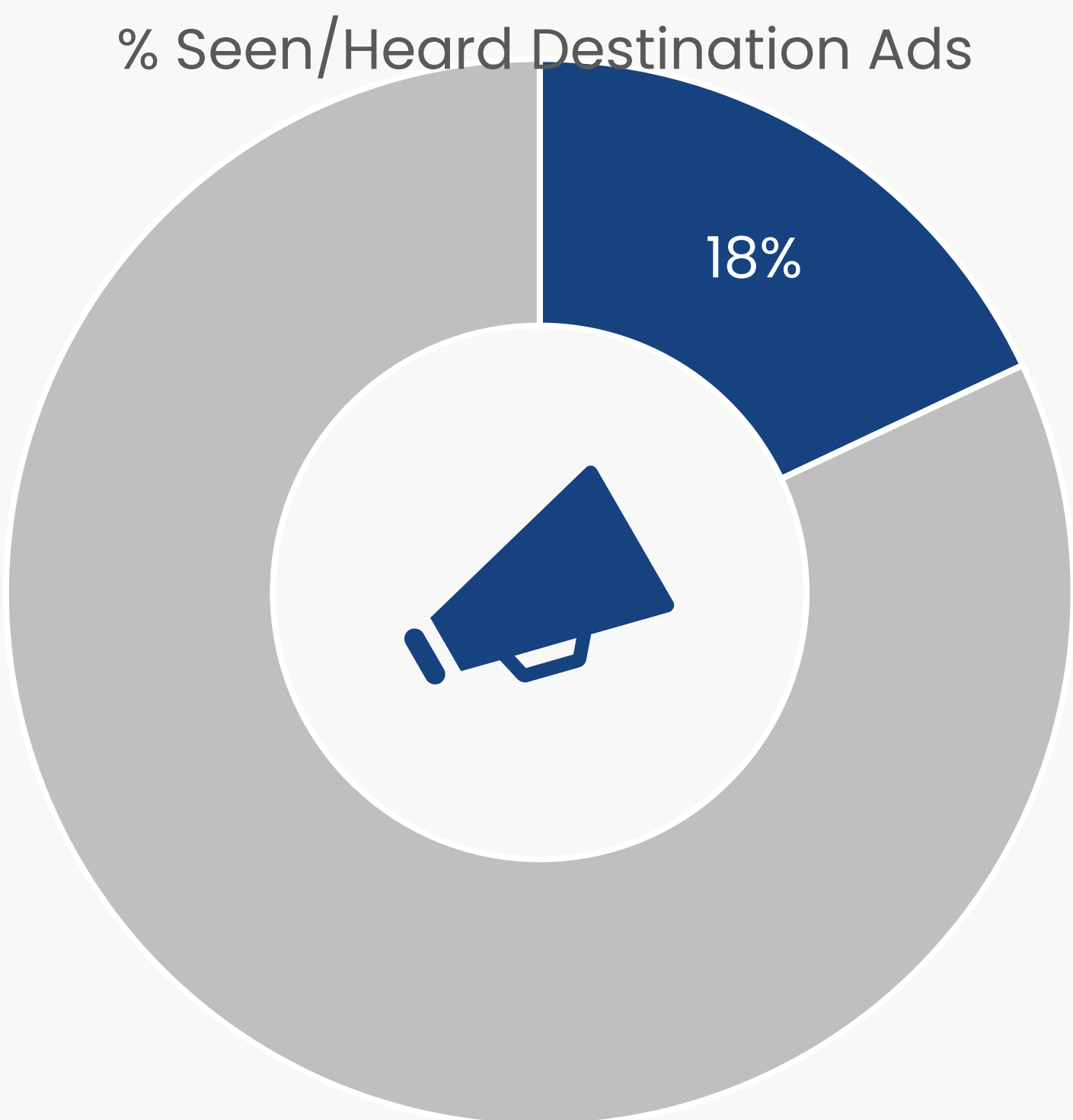


H2R Norm: 57%
Competitive Set Average: 63%



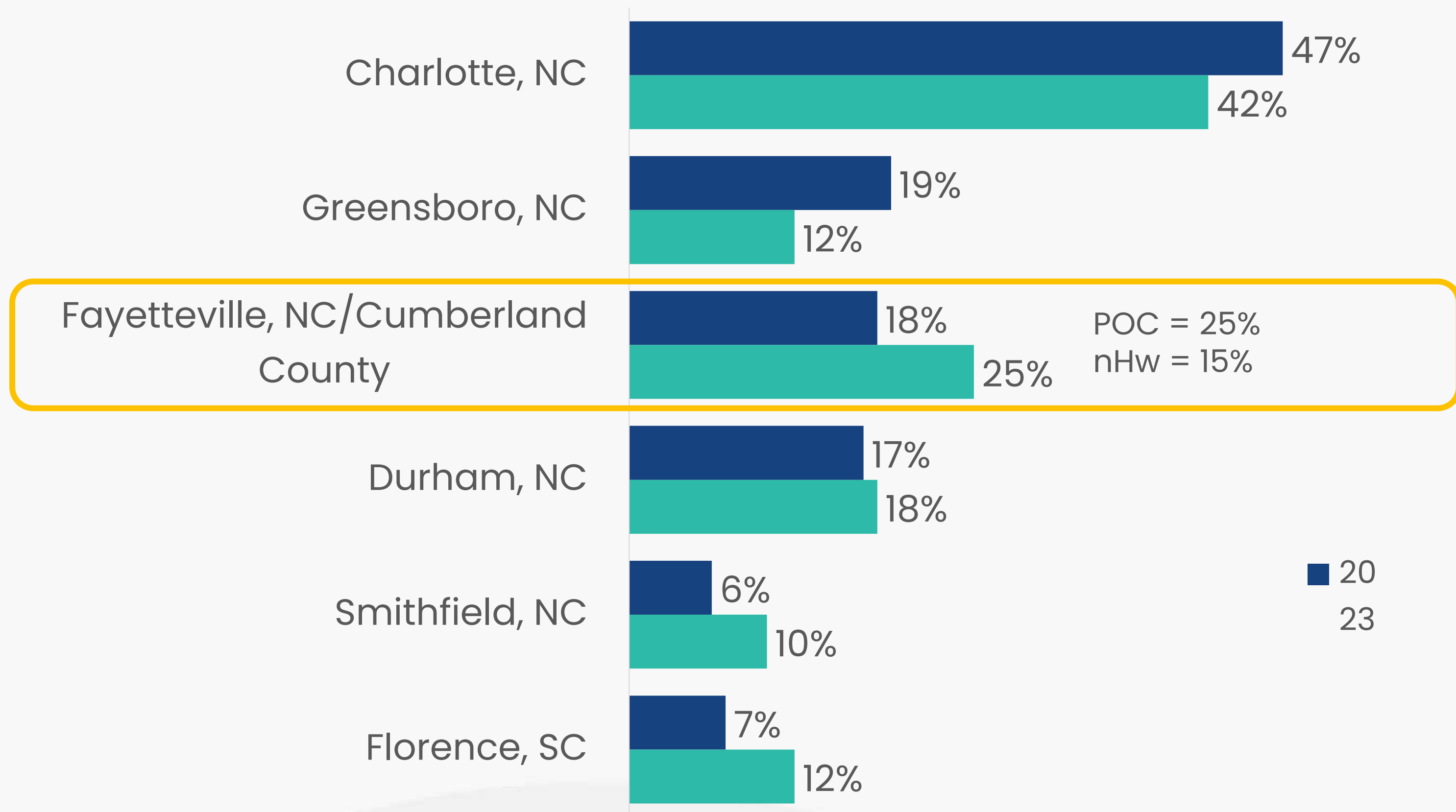
Fayetteville, NC/Cumberland County's share of voice averages 18%, down from 25% in 2021 and slightly lower than the comp set's average of 19%. All destinations decreased compared to 2021.

Fayetteville, NC/Cumberland Co. Share of Voice



Share of Voice = Assisted Ad Awareness

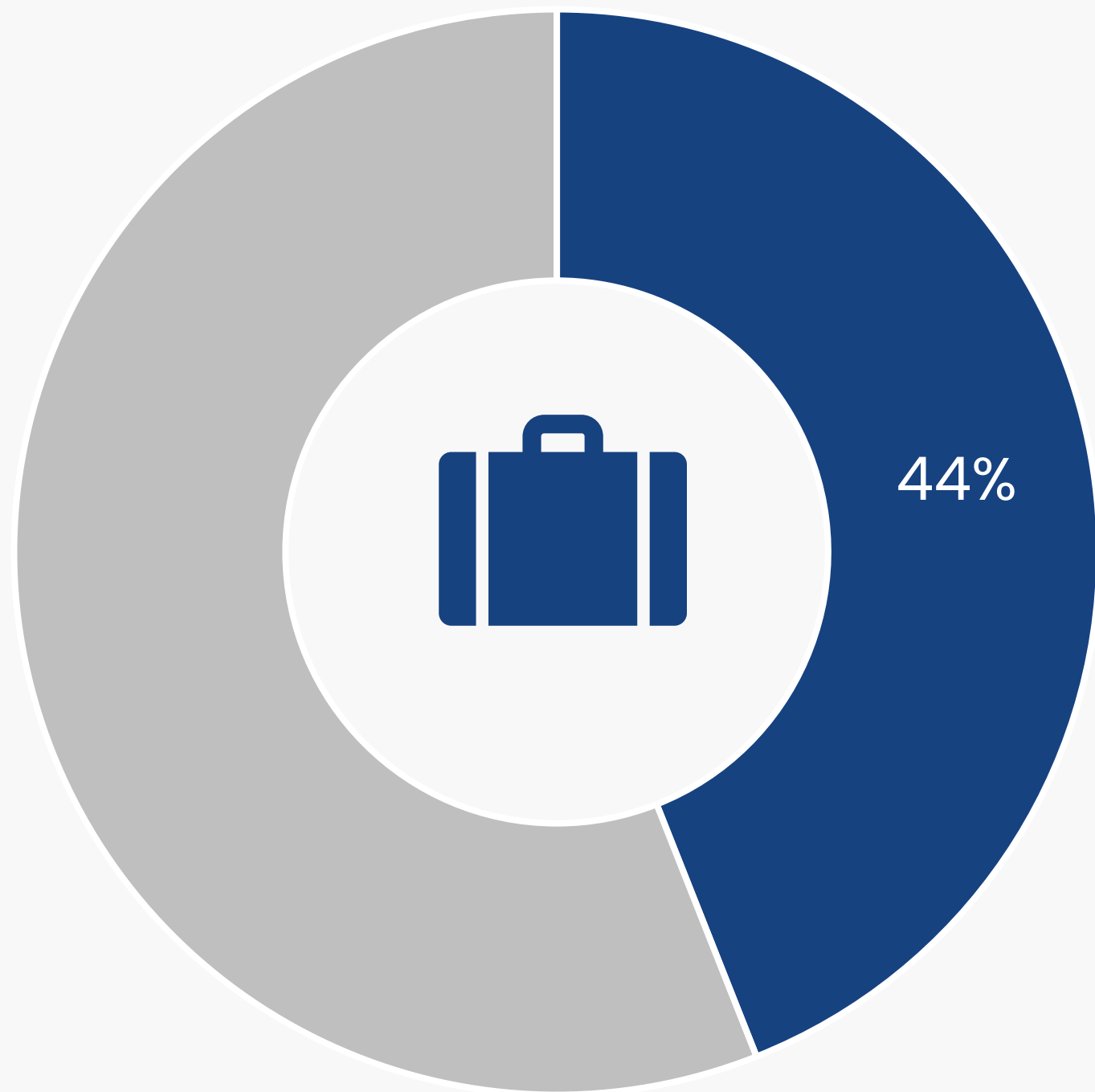
Competitive Destinations



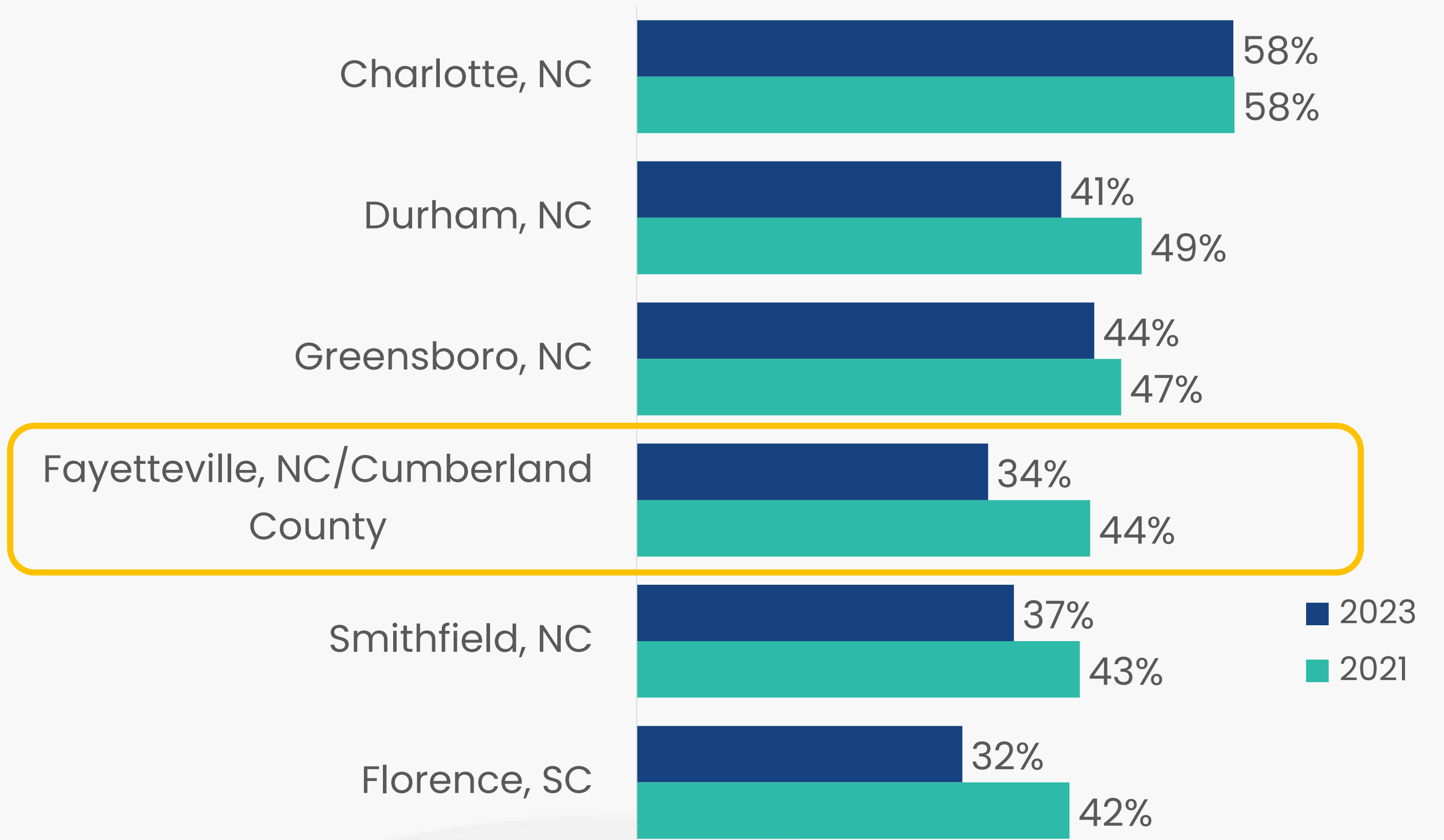
H2R Norm: 23%
Competitive Set Average: 19%

Out of sight, out of mind. Like share of voice, intent to visit dipped sharply across the region. Fayetteville, NC/Cumberland County (34%) fell 10 points from 2021 and is below the comp set average (41%).

Intent to Visit Fayetteville, NC/
Cumberland County
% Probably/Definitely Will Visit



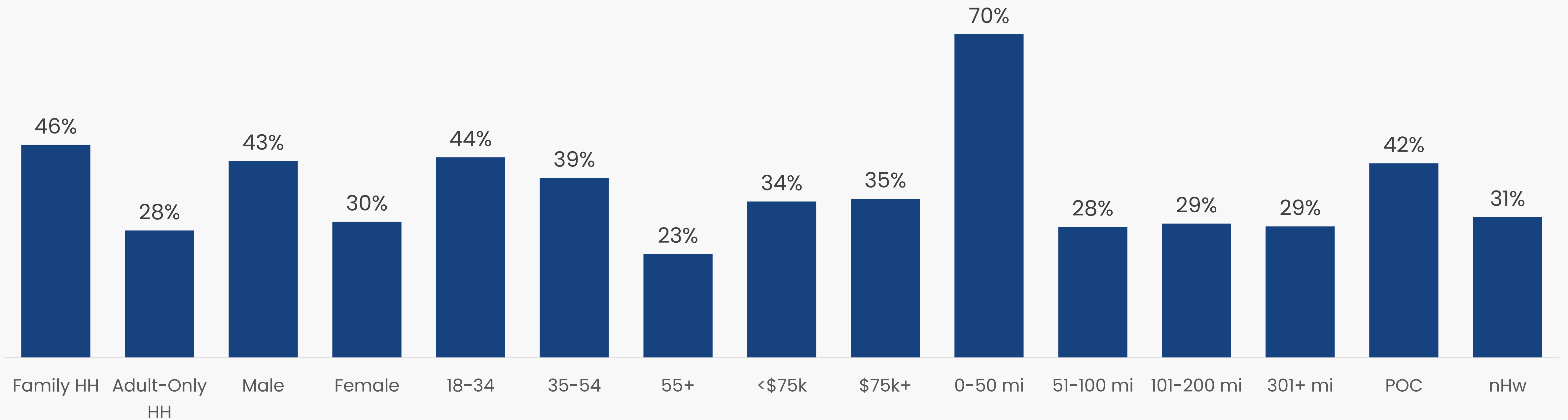
Competitive Destinations



H2R Norm: 36%
Competitive Set Average: 41%

Those with the highest intent to visit Fayetteville, NC/Cumberland County include residents, families, those 18-34 years and People of Color.

Intent to Visit by Consumer Niche
% Probably/Definitely Will



Fayetteville, while having a higher-than-average share of visitors, has a retention rate that is below average. Additionally, significantly fewer travelers plan to visit within the next 12 months compared to the competitive set average.

Brand Health Summary	Fayetteville, NC/ Cumberland County	Charlotte, NC	Greensboro, NC	Durham, NC	Florence, SC	Smithfield, NC	Comp Set Average
Aided Brand Awareness	100%	95%	87%	82%	63%	42%	78%
Market Share – Past 5 Years	37%	57%	42%	38%	24%	18%	36%
Market Share – Ever Visited	88%	73%	67%	62%	44%	30%	60%
Considered, But Never Visited	15%	9%	12%	11%	10%	5%	10%
Conversion Rate	42%	63%	53%	52%	43%	52%	51%
Retention Rate	51%	70%	63%	61%	53%	61%	60%
Positive Opinion (Reputation)	54%	80%	67%	63%	58%	55%	63%
Share of Voice	18%	47%	19%	17%	7%	6%	19%
Intent to Visit	34%	58%	44%	41%	32%	37%	41%



Brand Health Summary Among Residents vs. Tourists

Residents who live within 50 miles of Fayetteville, NC/Cumberland County are more likely to have visited and have a much higher conversion and retention rate.

Although, tourists have a more positive opinion of Fayetteville, NC/Cumberland County than do residents.

	Overall	Residents (0-50 Miles)	Tourists (51+ Miles)
Aided Brand Awareness	100%	100%	100%
Market Capture – Past 5 Years	44%	80%	31%
Market Capture – Ever Visited	72%	91%	70%
Considered, But Never Visited	16%	4%	17%
Conversion Rate	50%	84%	35%
Retention Rate	60%	87%	44%
Positive Opinion (Reputation)	53%	56%	54%
Share of Voice	25%	33%	16%
Intent to Visit	44%	70%	29%

Tourists were asked to describe Fayetteville, NC/Cumberland County in a word or short phrase. Artificial Intelligence was used to summarize the various comments.

Fayetteville has a picturesque, quaint and relaxing feel with beautiful scenery in some areas.

Fayetteville is a military town dominated by Fort Bragg.

It has a rich military history and many historical sites to visit.

The Cross Creek mall is a good shopping center.

The town is trying to improve its reputation and revitalize its downtown.

Some parts of the town are crime-ridden and dangerous.

It has a small-town charm and welcoming hospitality.

The town has a mixture of things to do, from shopping to eating out.

Compared to regional destinations of comparable size and scope, Fayetteville, NC/Cumberland County prospects feel the area is most differentiated by patriotism.

Brand Differentiators	Fayetteville, NC/Cumberland County	Charlotte, NC	Greensboro, NC	Durham, NC	Florence, SC	Smithfield, NC	Comp Set Average
Charm	34%	46%	44%	40%	57%	52%	45%
Inviting Downtown	31%	68%	50%	48%	40%	37%	46%
Spectator Sports	14%	60%	25%	37%	10%	7%	25%
Museums	25%	48%	28%	32%	17%	15%	28%
Patriotism	45%	20%	18%	19%	23%	23%	25%

01. Traveler Sentiment

02. Brand Health

03. Visitor Profile

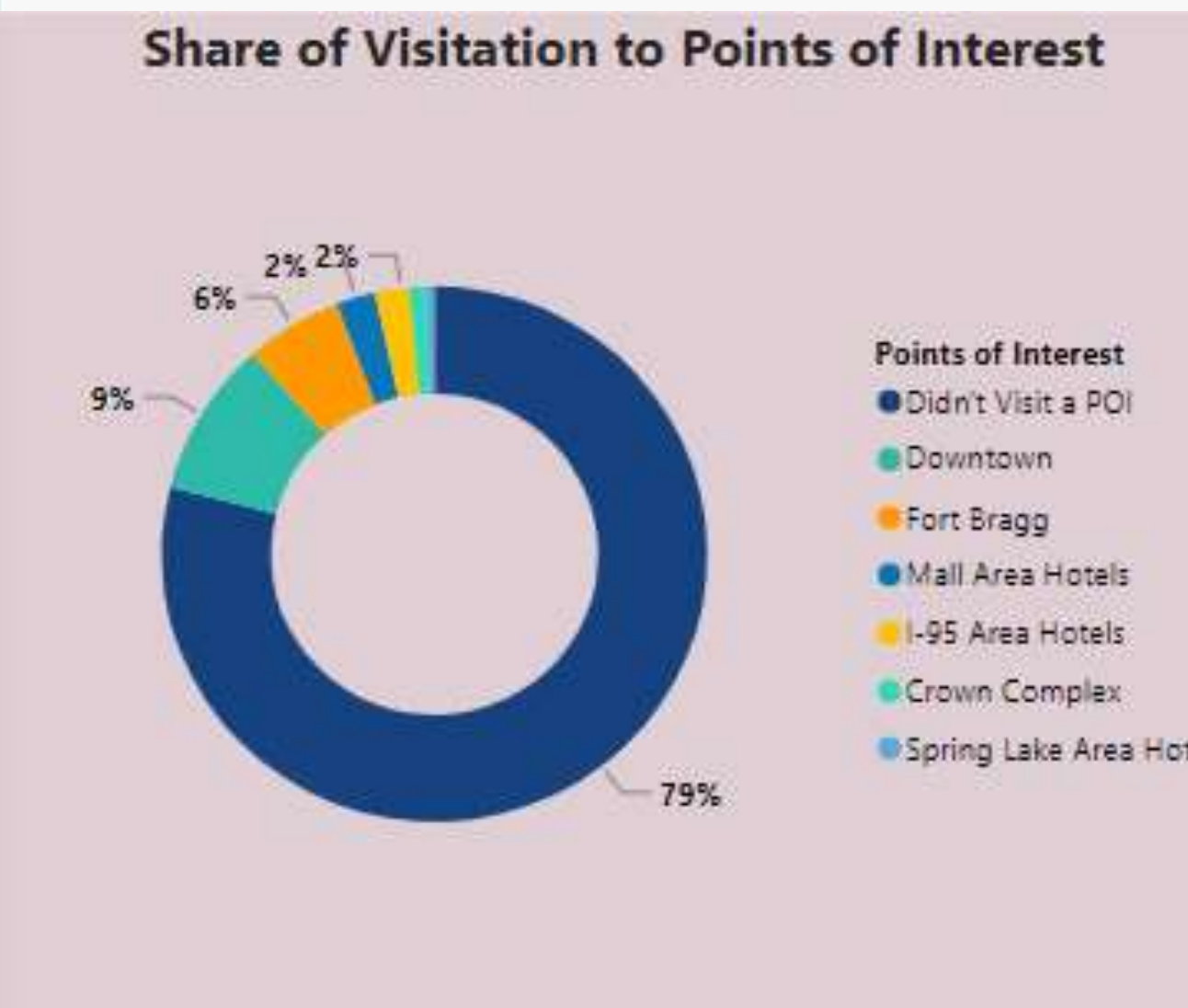
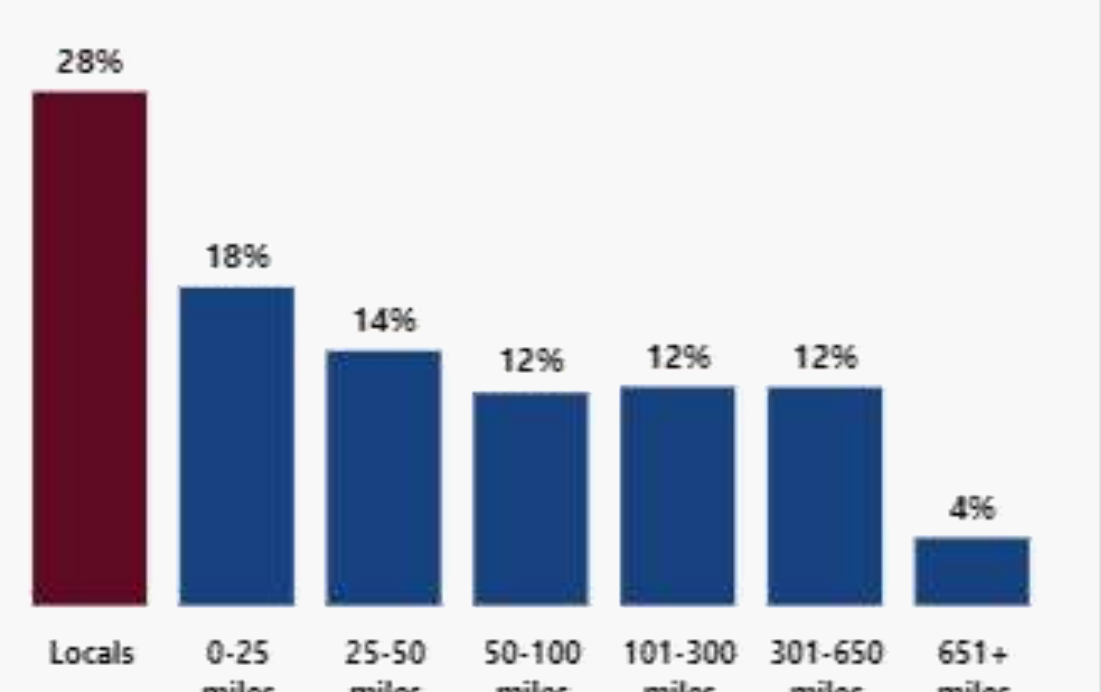
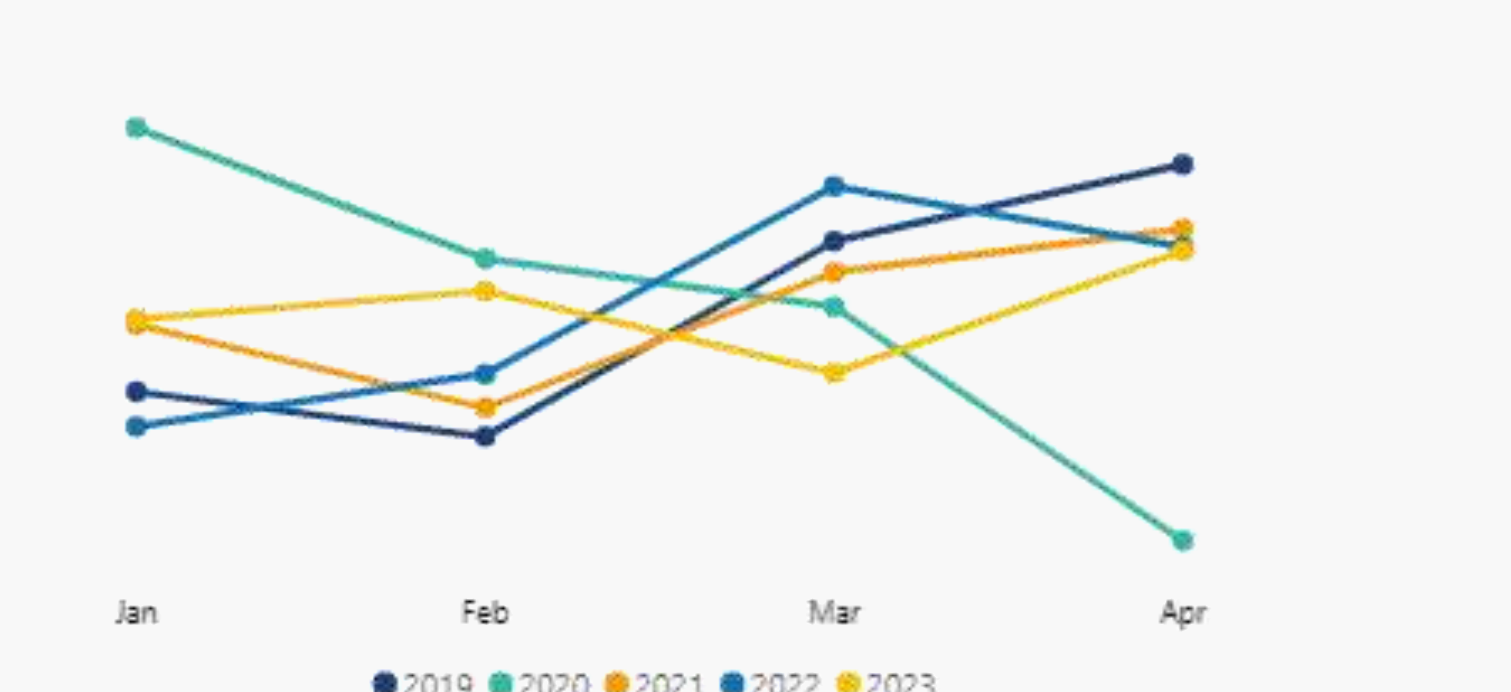
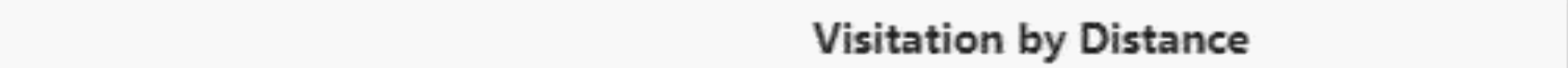
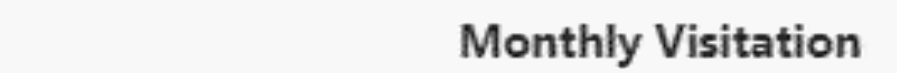
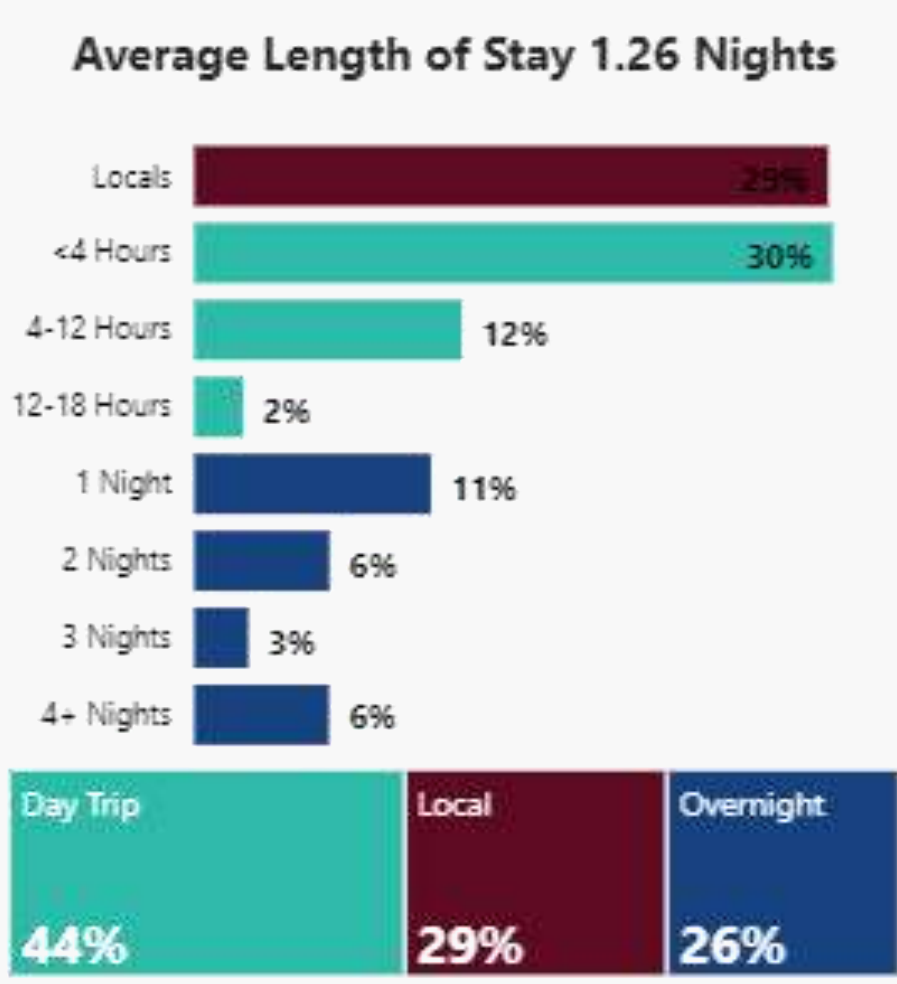
04. Barriers to Visitation

05. Categorization

RECENT FAYETTEVILLE VISITOR | N=288

DMA Report & More: OVERVIEW

Distance Bucket	DMA	% Trips	BDI
Locals	RALEIGH-DURHAM	28.47%	3,099.47
0-25 miles	RALEIGH-DURHAM	14.31%	1,558.17
25-50 miles	MYRTLE BEACH-FLORENCE	3.60%	1,482.56
0-25 miles	MYRTLE BEACH-FLORENCE	3.02%	1,242.84
50-100 miles	WILMINGTON	1.43%	994.07
25-50 miles	RALEIGH-DURHAM	8.94%	973.29
25-50 miles	WILMINGTON	1.21%	844.35
50-100 miles	MYRTLE BEACH-FLORENCE	1.62%	668.86
50-100 miles	RALEIGH-DURHAM	5.34%	581.13
50-100 miles	GREENVILLE-NEW BERN-WASHINGTON	1.19%	468.86
50-100 miles	GREENSBORO-HIGH POINT-WINSTON SALEM	1.56%	281.00
101-300 miles	CHARLOTTE	2.48%	262.48
101-300 miles	COLUMBIA, SC	1.21%	259.96
101-300 miles	CHARLESTON, SC	0.85%	243.34
0-25 miles	WILMINGTON	0.31%	214.72
101-300 miles	RICHMOND-PETERSBURG	0.96%	213.56
101-300 miles	NORFOLK-PORTSMOUTH-NEWPORT NEWS	1.29%	211.58
101-300 miles	SAVANNAH	0.56%	197.90
101-300 miles	GREENVILLE-NEW BERN-	0.50%	196.70
Total		100.00%	100.00

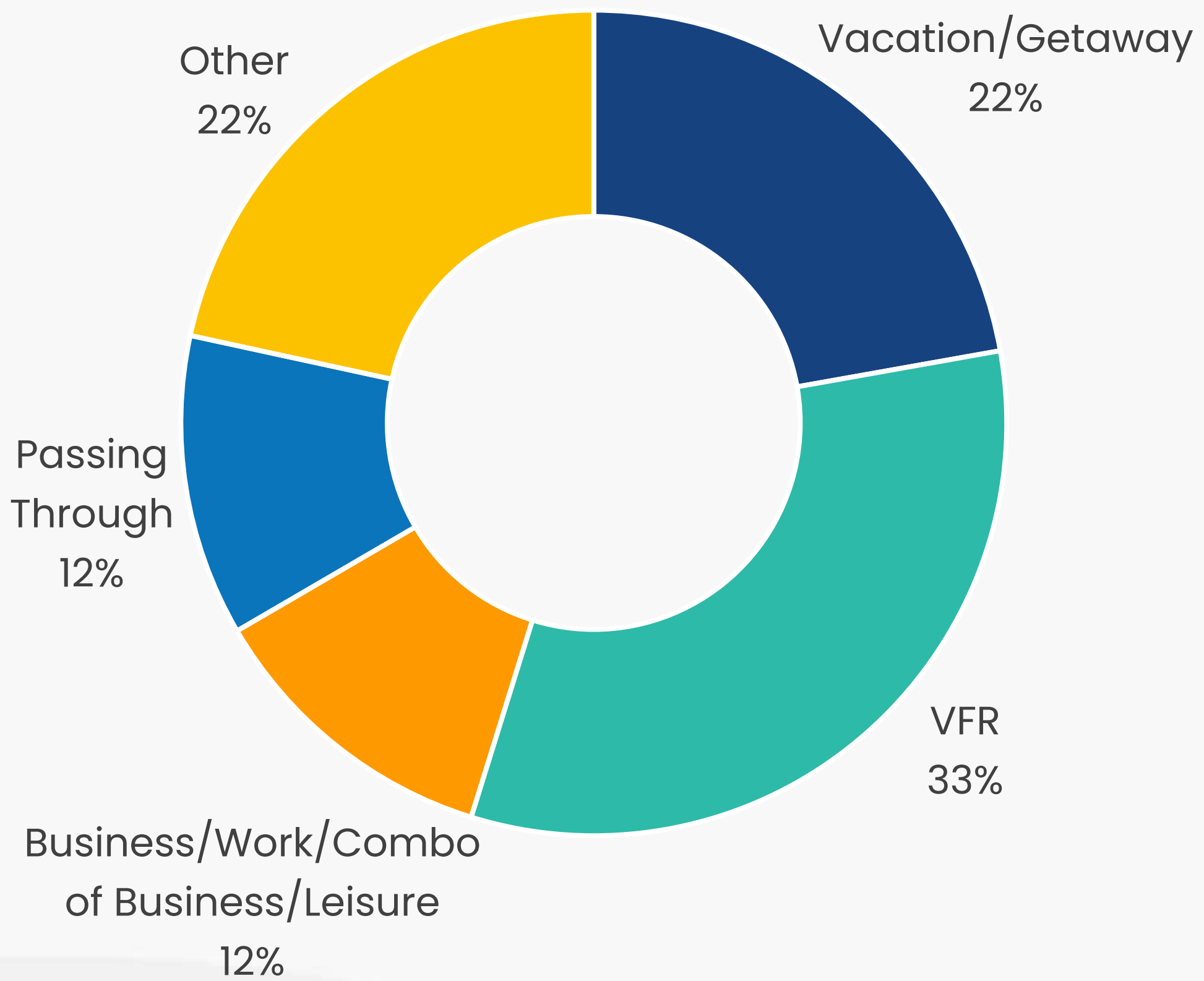


Using the Scout Report which is fueled by consumer cell phone pings (representing the country and not just a trade area of 300 miles), it is possible to evaluate where all travelers who travel to Fayetteville, NC/Cumberland County area come from.

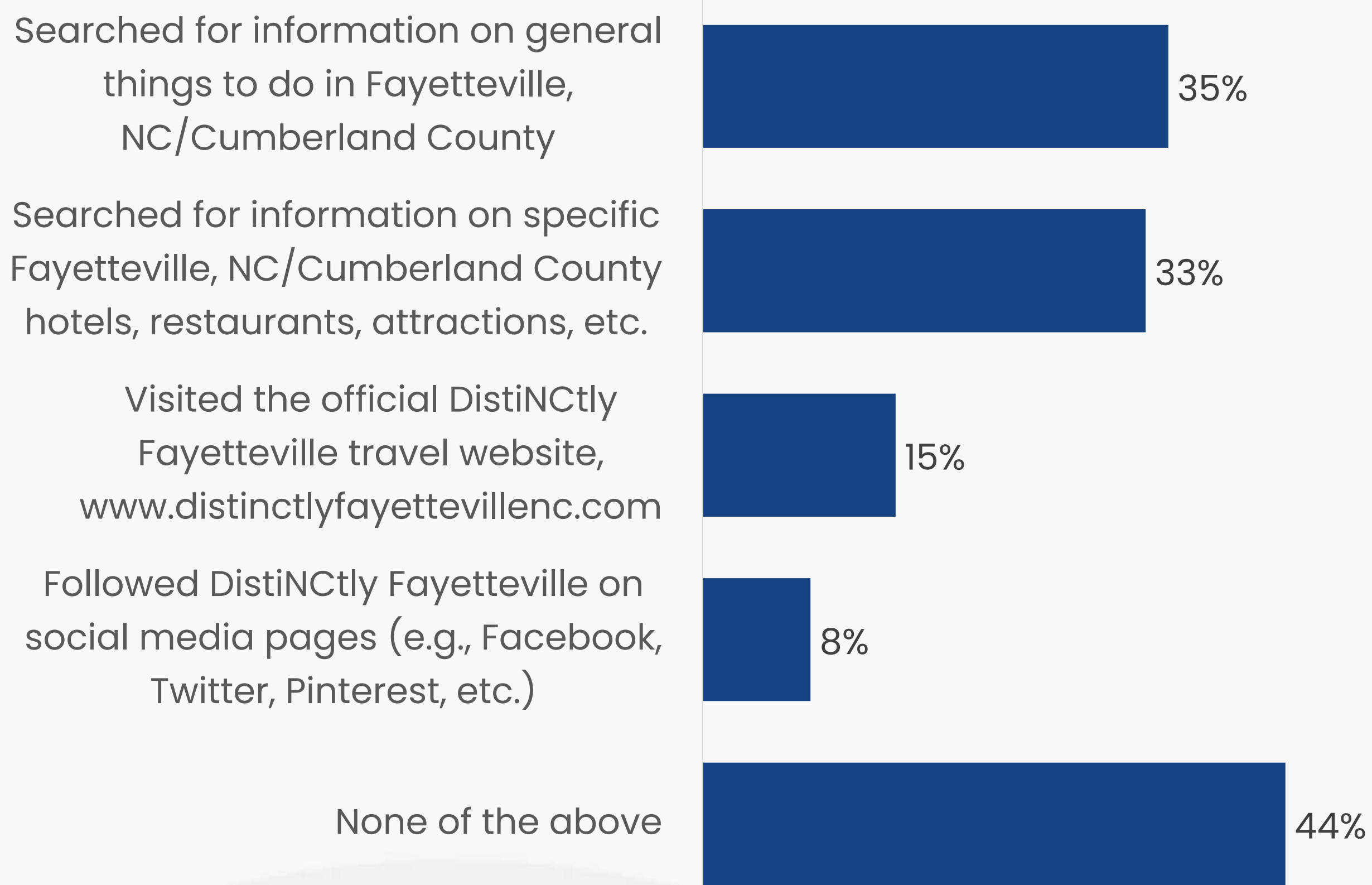
This data indicates that roughly 40% of all Fayetteville, NC/Cumberland County visits are generated from beyond 50 miles and that 26% of all travelers spend the night in the area.

Comparatively few (22%) regional travelers visit the area for leisure purposes (vacation or getaway) while quite a few visit friends/family or VFR (33%).

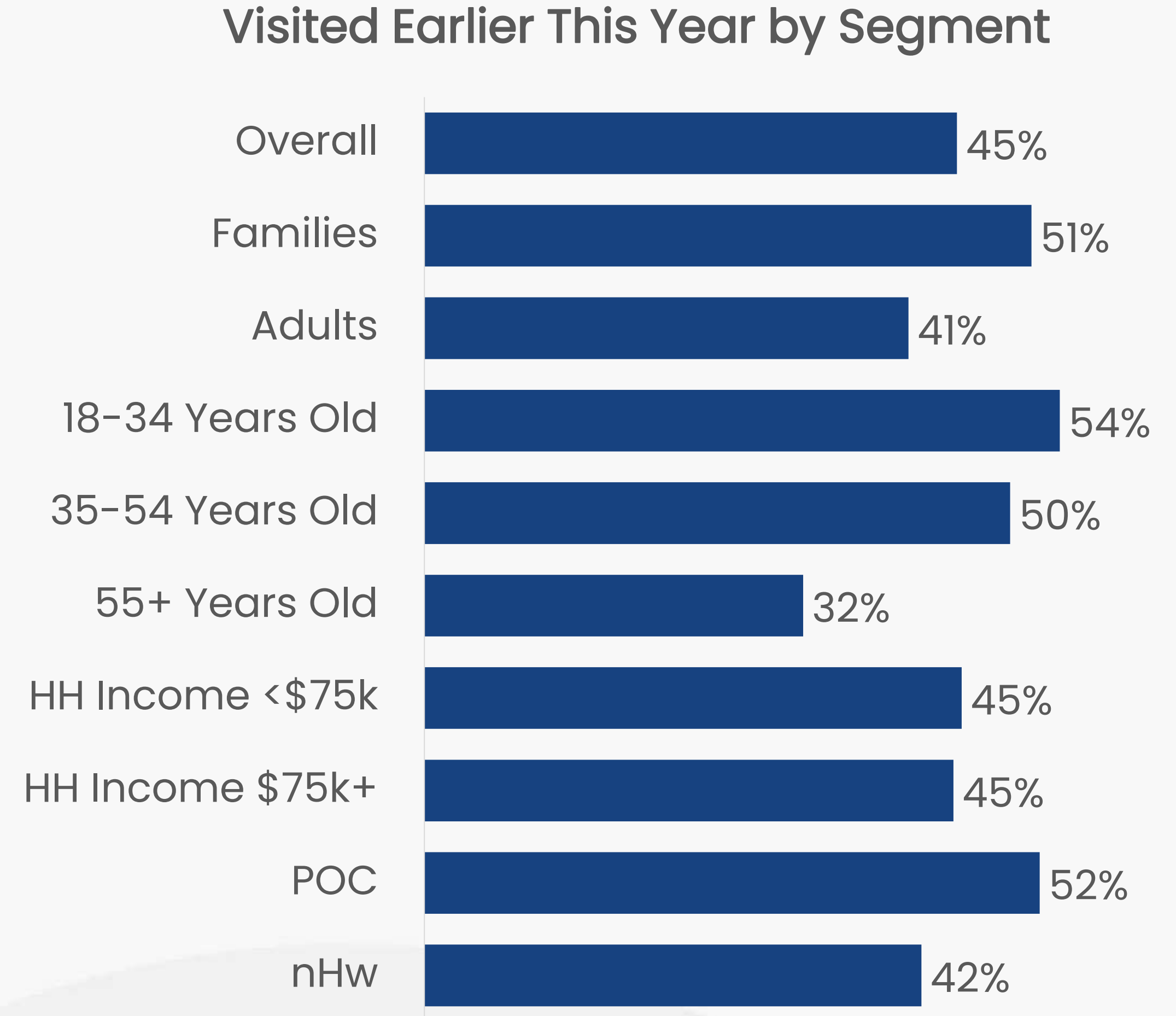
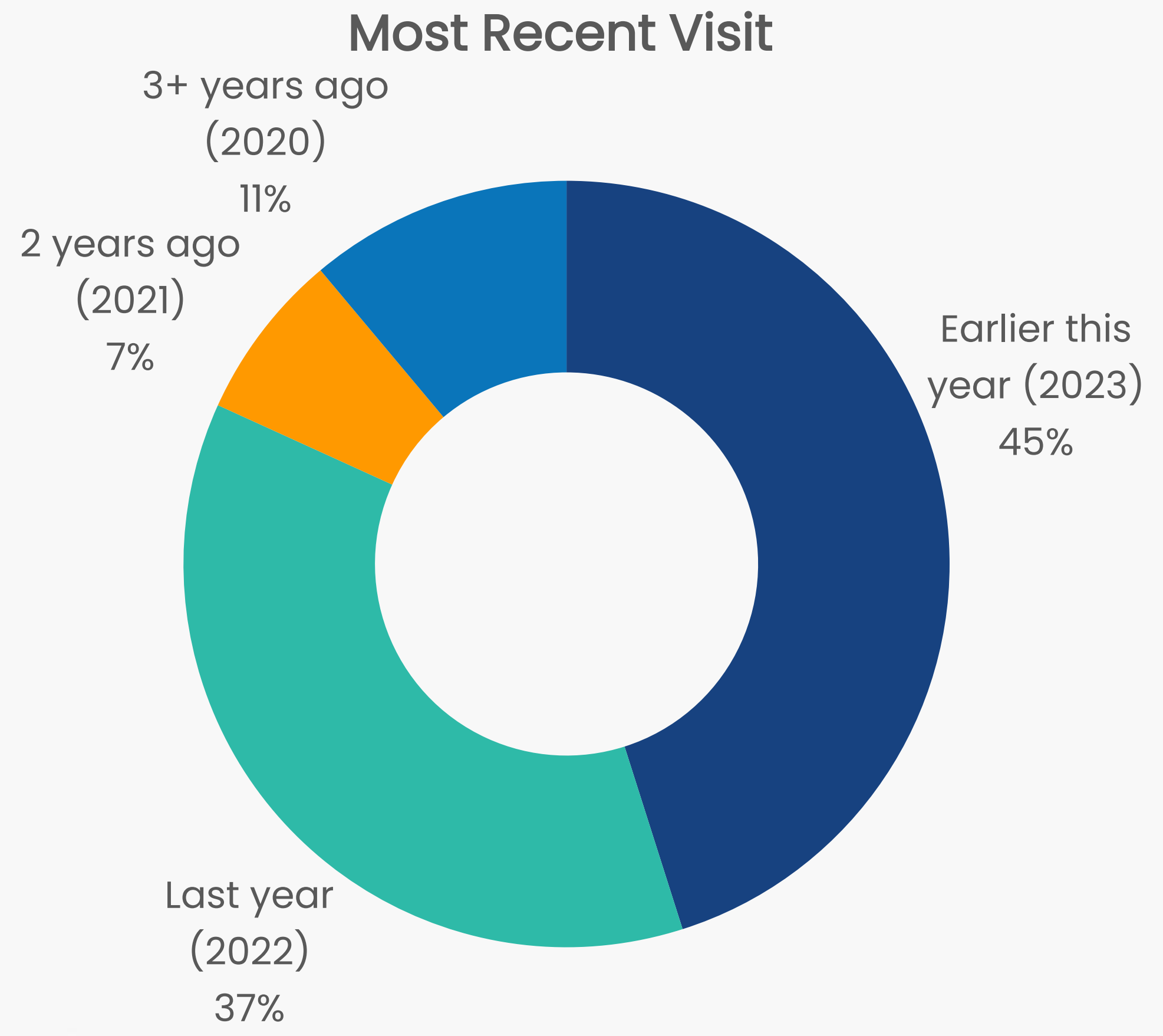
Primary Purpose of Visit



Actions Taken Prior to Visiting Fayetteville

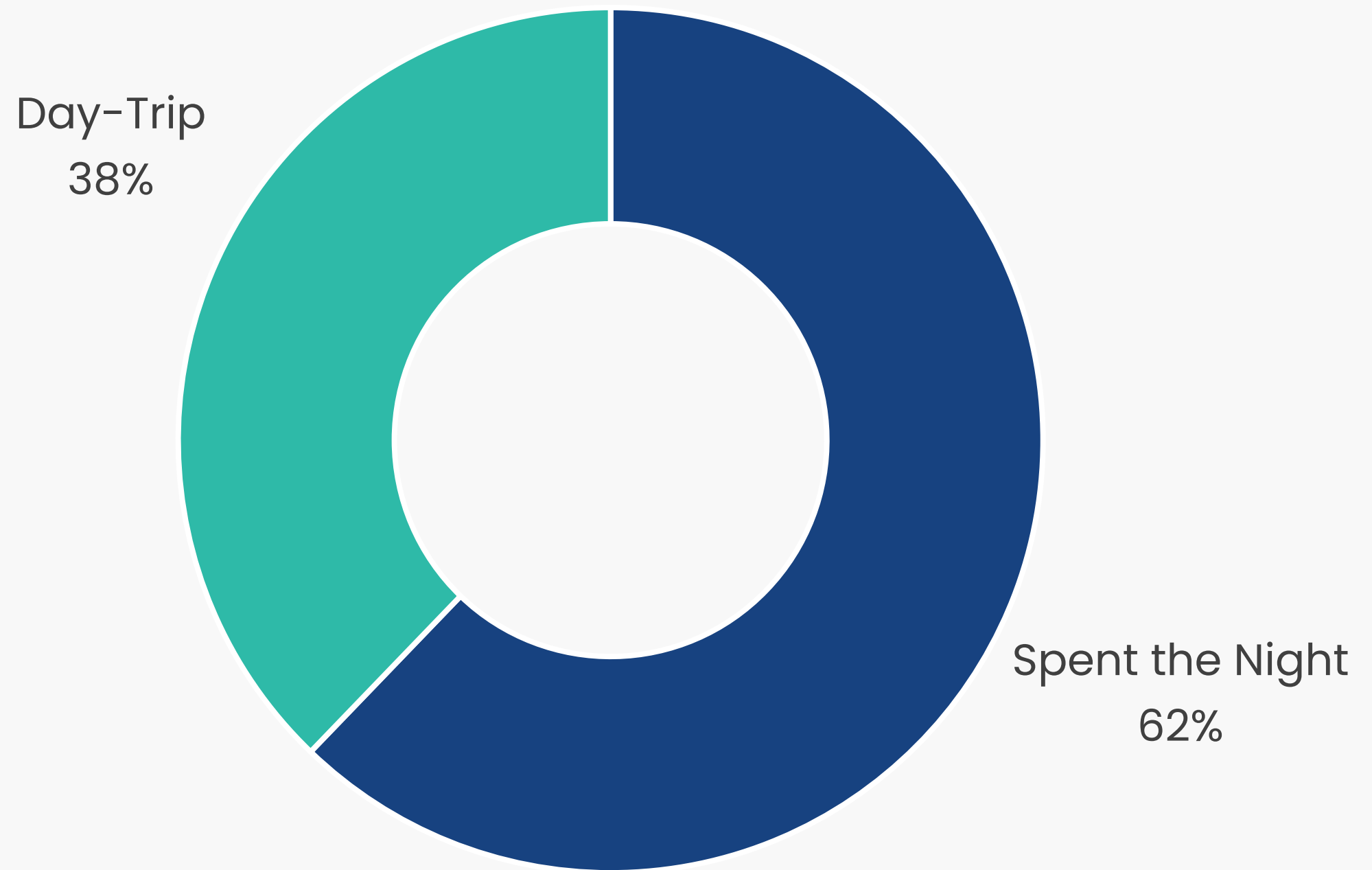


Nearly half (45%) of visitors indicated that their most recent visit to the area occurred earlier this year.

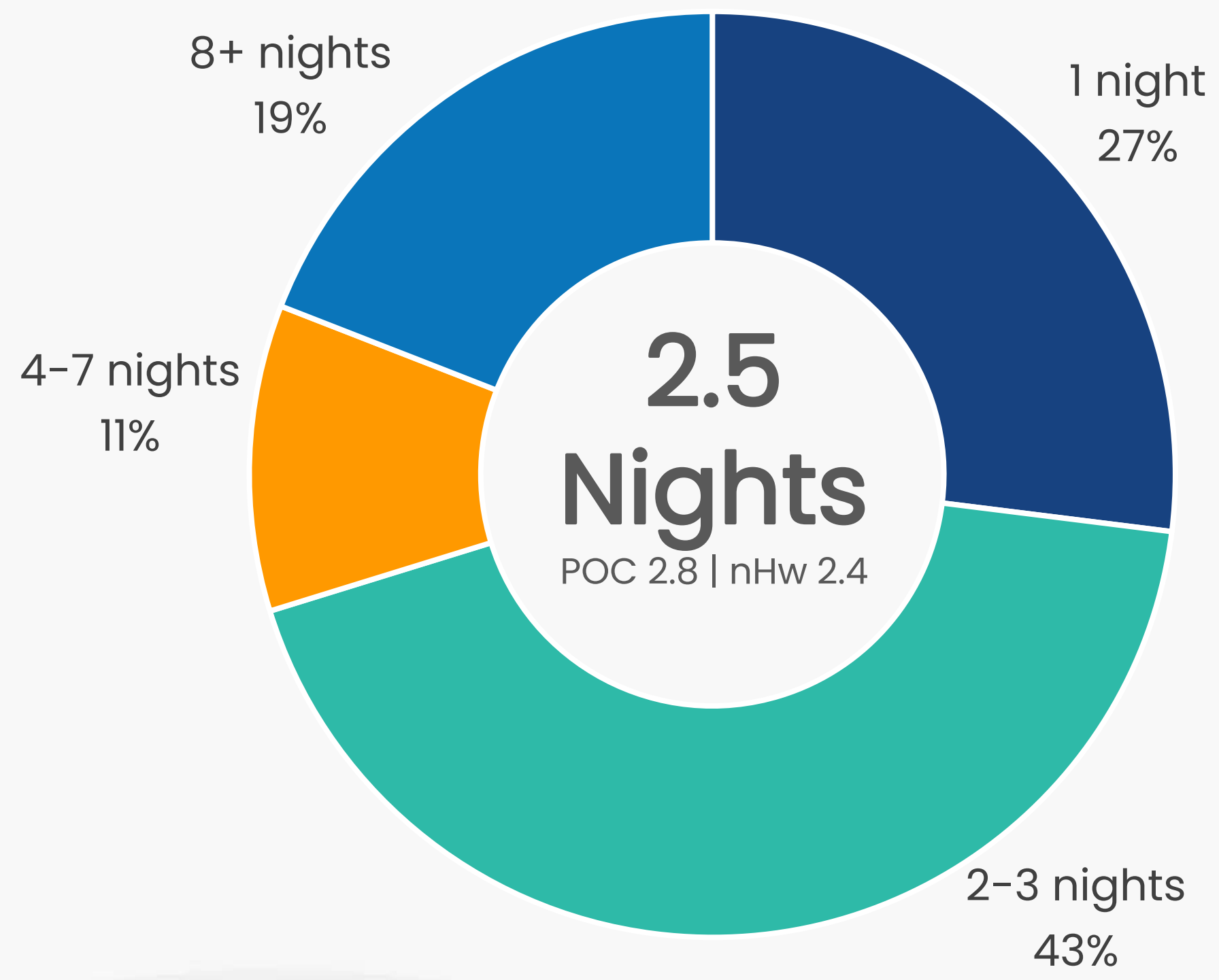


Most Fayetteville, NC/Cumberland County visitors spend the night when they visit the area, and they stay for an average of 2.5 nights.

Overnight vs. Day-Trips

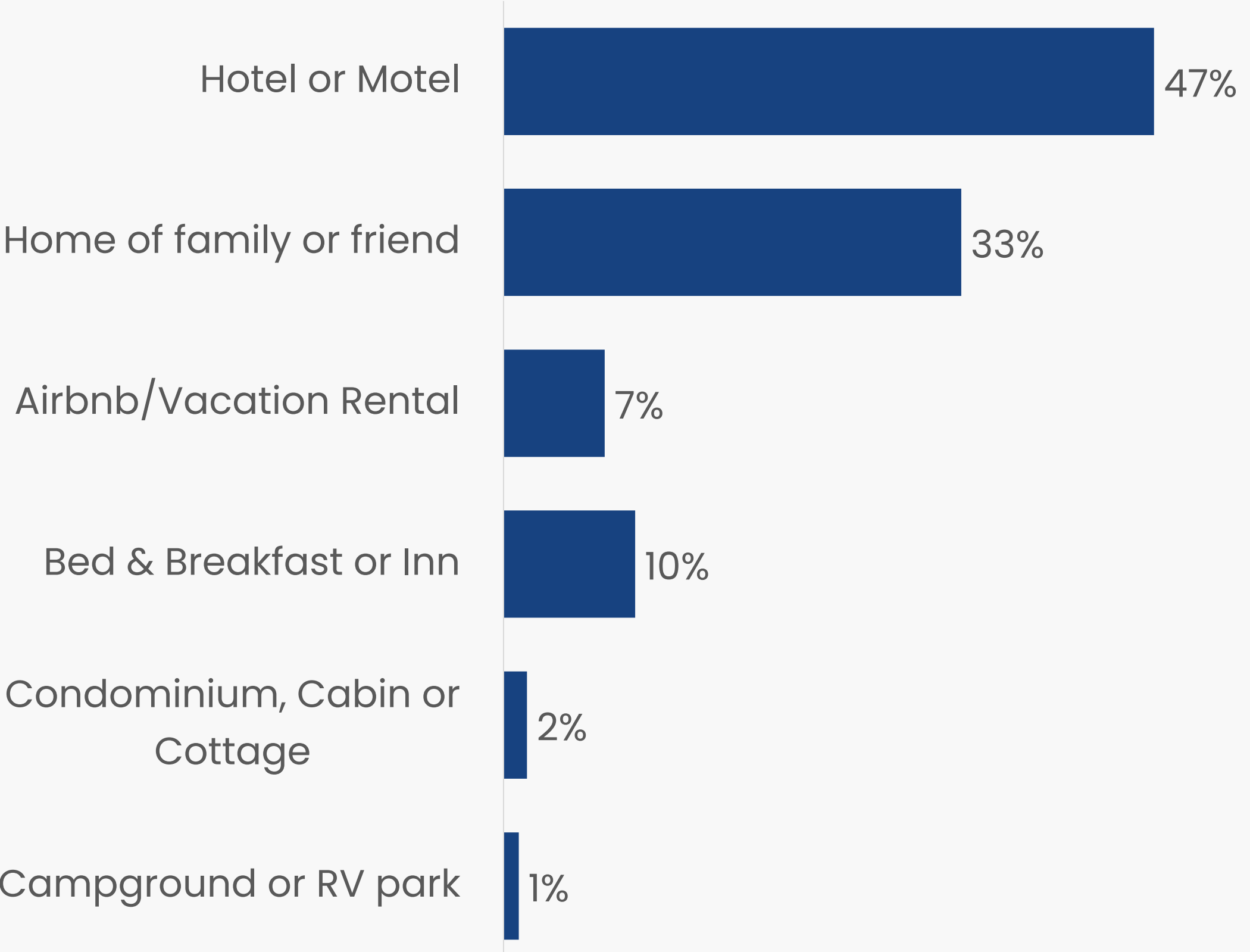


Length of Stay



Most overnight travelers stay in area hotels/motels and the average visitor reports spending \$234 per party. Families and those in the 18-34 age range spend the most money on their visits.

Accommodations



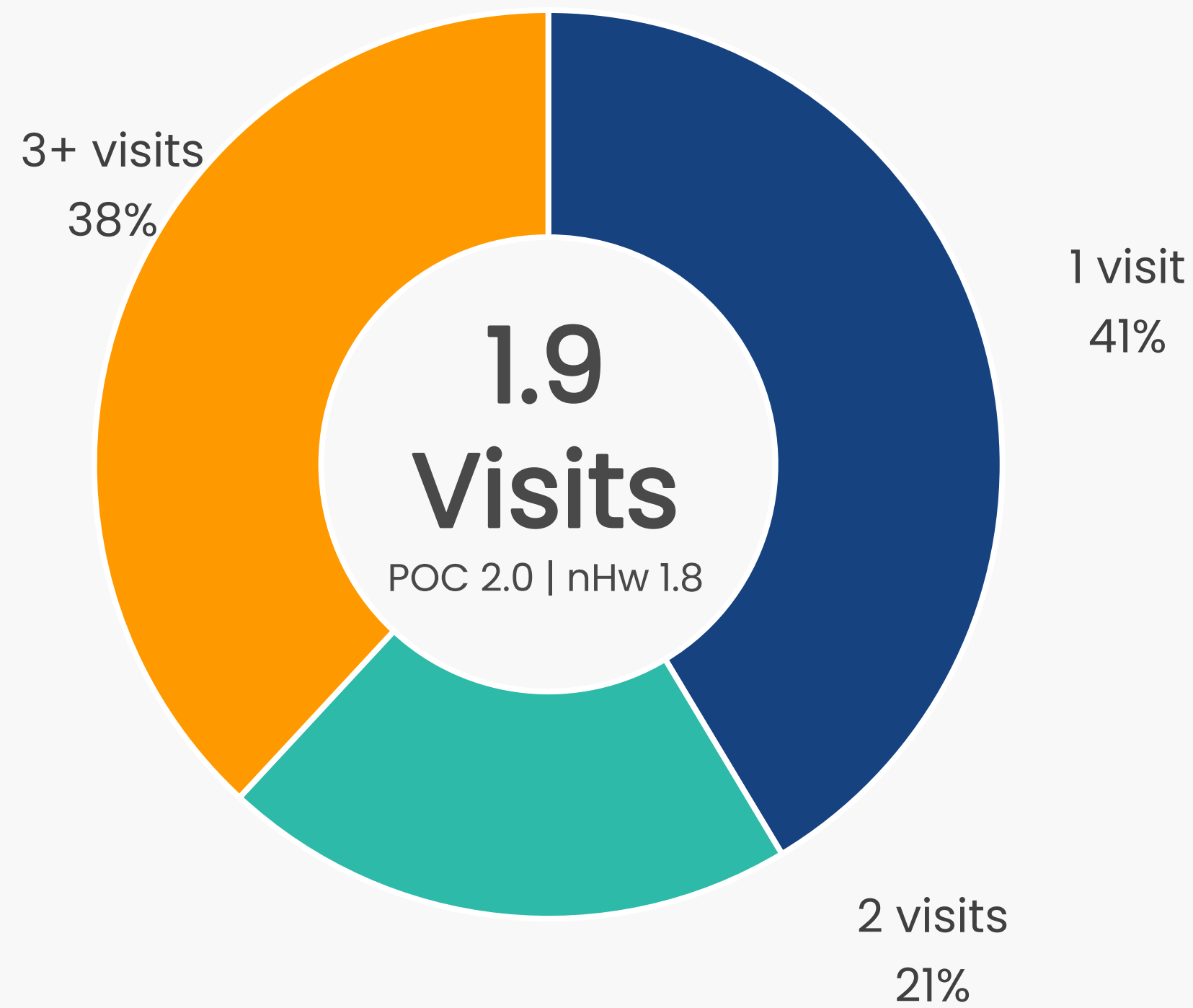
Party Trip Spending \$234

Spending per Party by Niche:

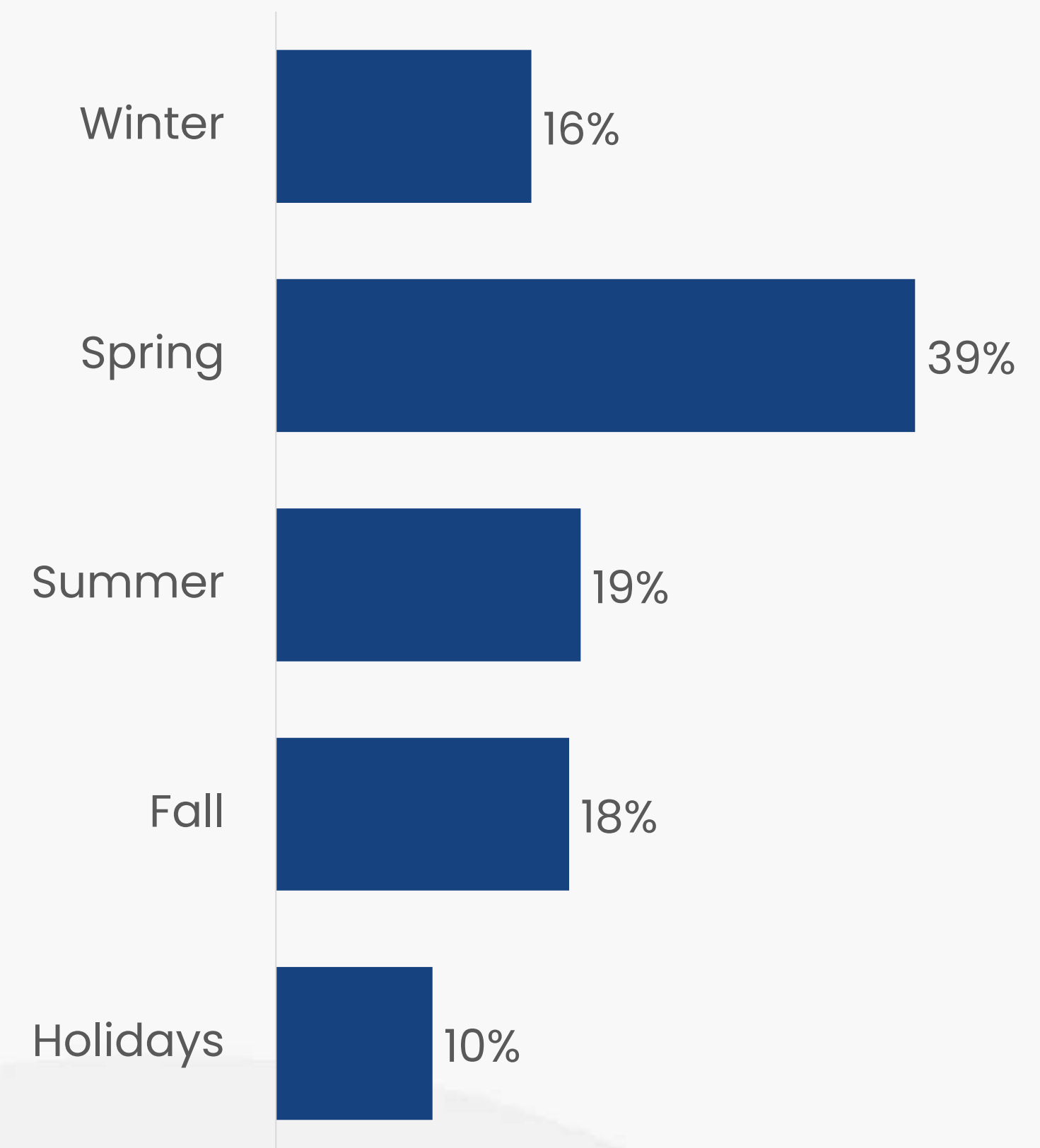
- Overall \$234
- Family HH \$357
- Adult HH \$160
- 18-34 \$337
- 35-54 \$259
- 55+ \$142
- Residents \$291
- Tourists \$223
- POC \$265
- nHw \$217

The average Fayetteville, NC/Cumberland County traveler visits 1.9 times per year with the most popular seasons to visit being spring and summer with fall following close behind.

Frequency of Visitation



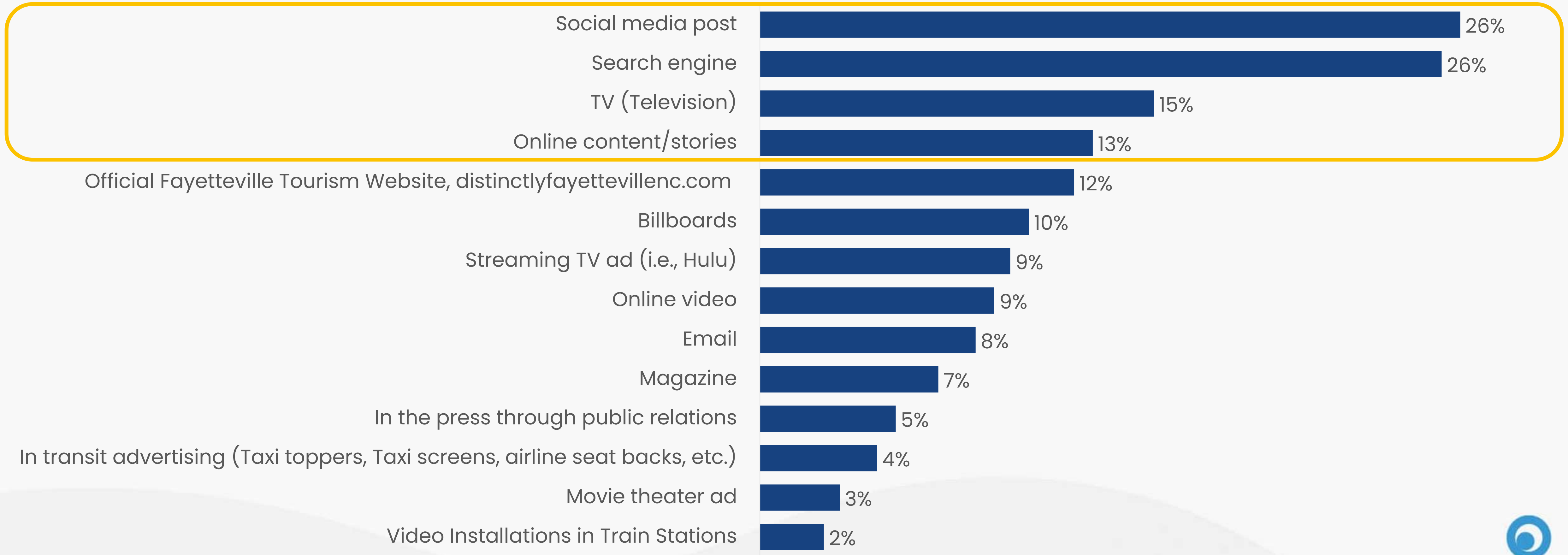
Self-Reported Seasonality



Social media posts, search engines, television and online content/stories were most likely to inspire visitation within the past 12 months.

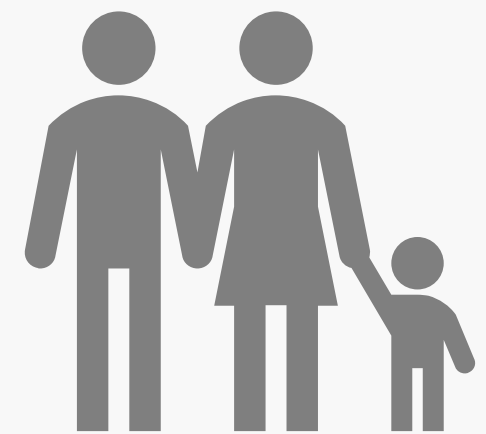
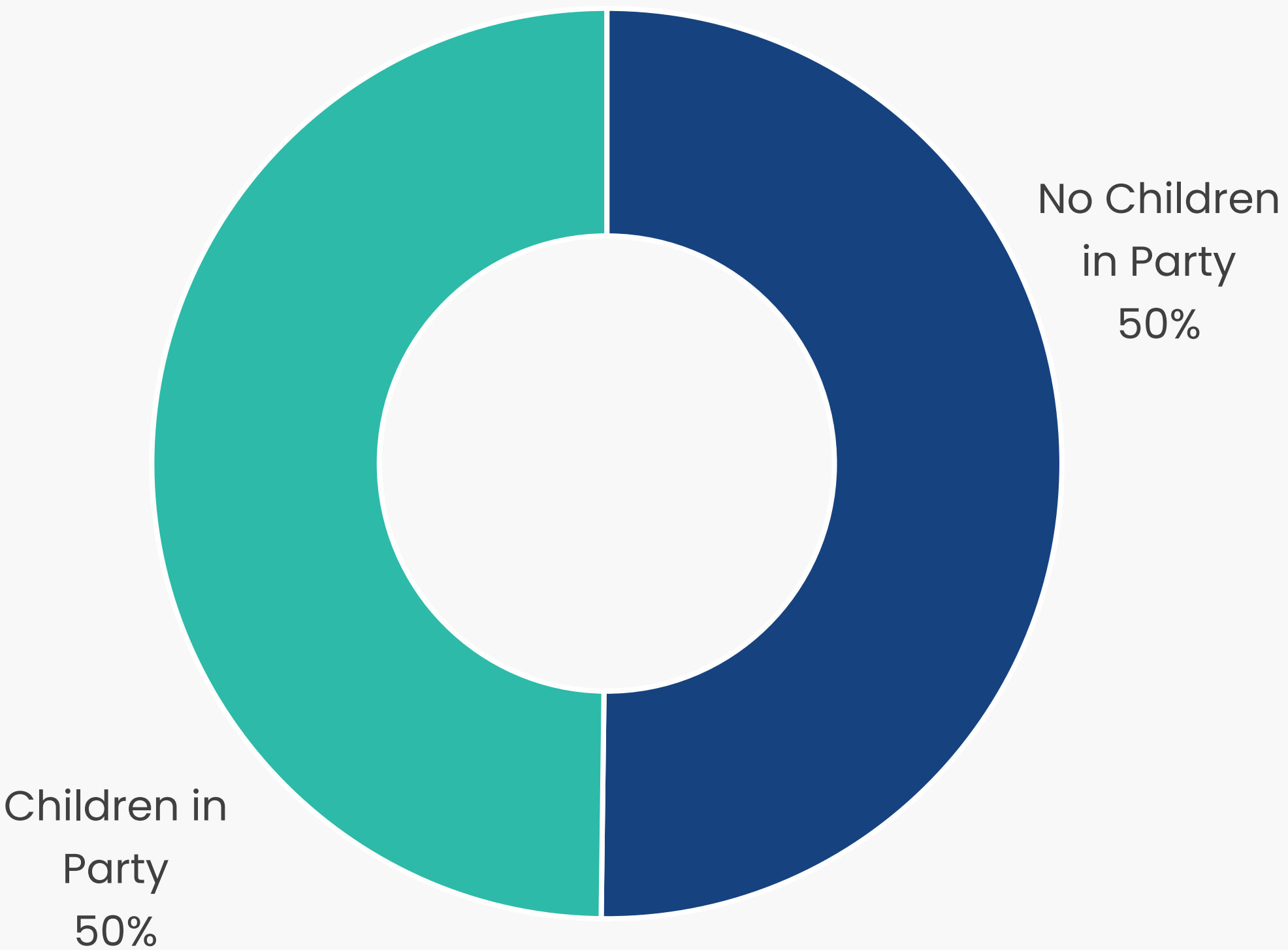
Media Most Likely to Inspire Trips

Select All That Apply



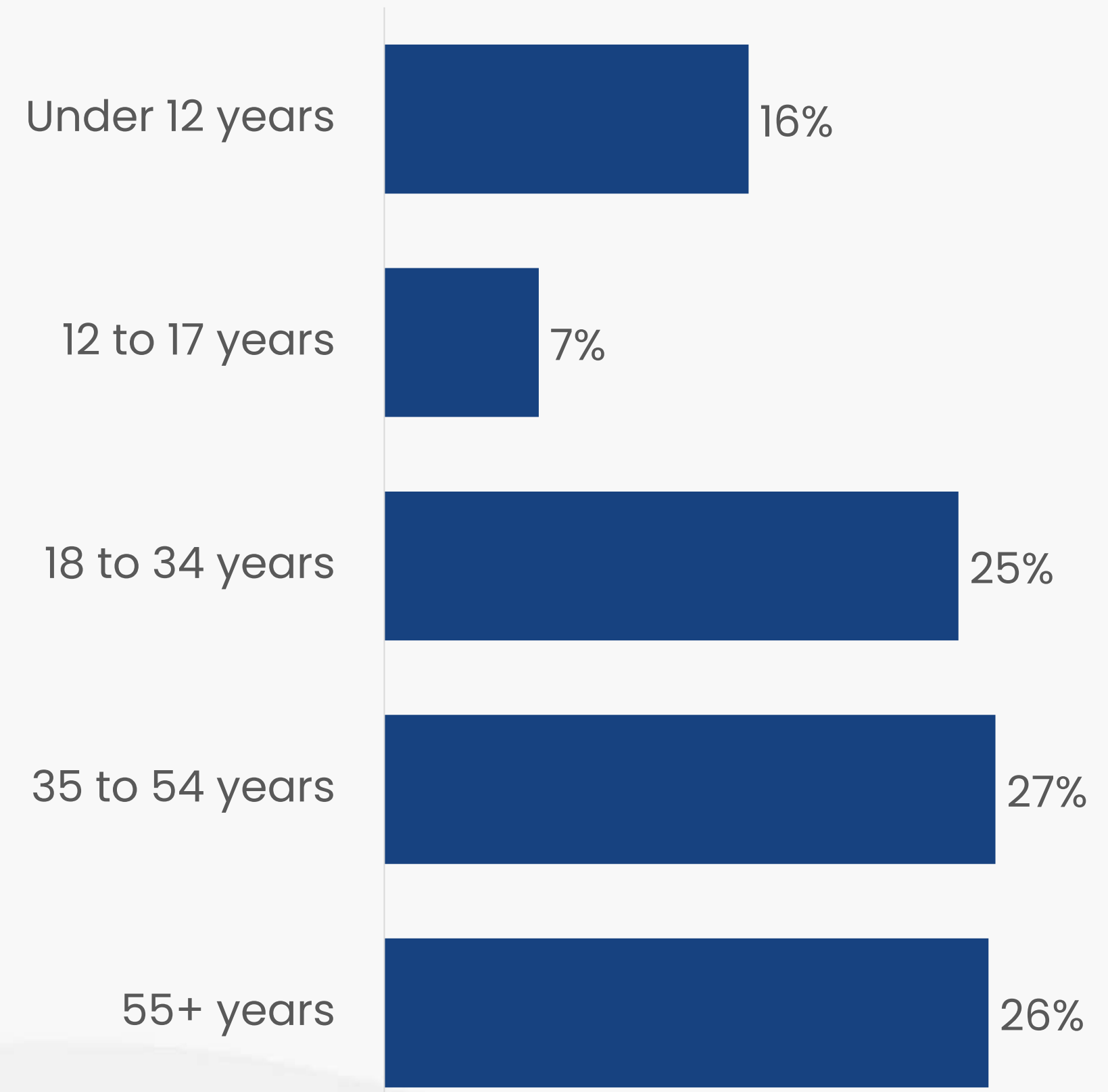
The average recent visitor to Fayetteville, NC/Cumberland County is a 50/50 mix of families and adults-only with an average age of 45.7 and an average party size of 2.3.

Party Composition



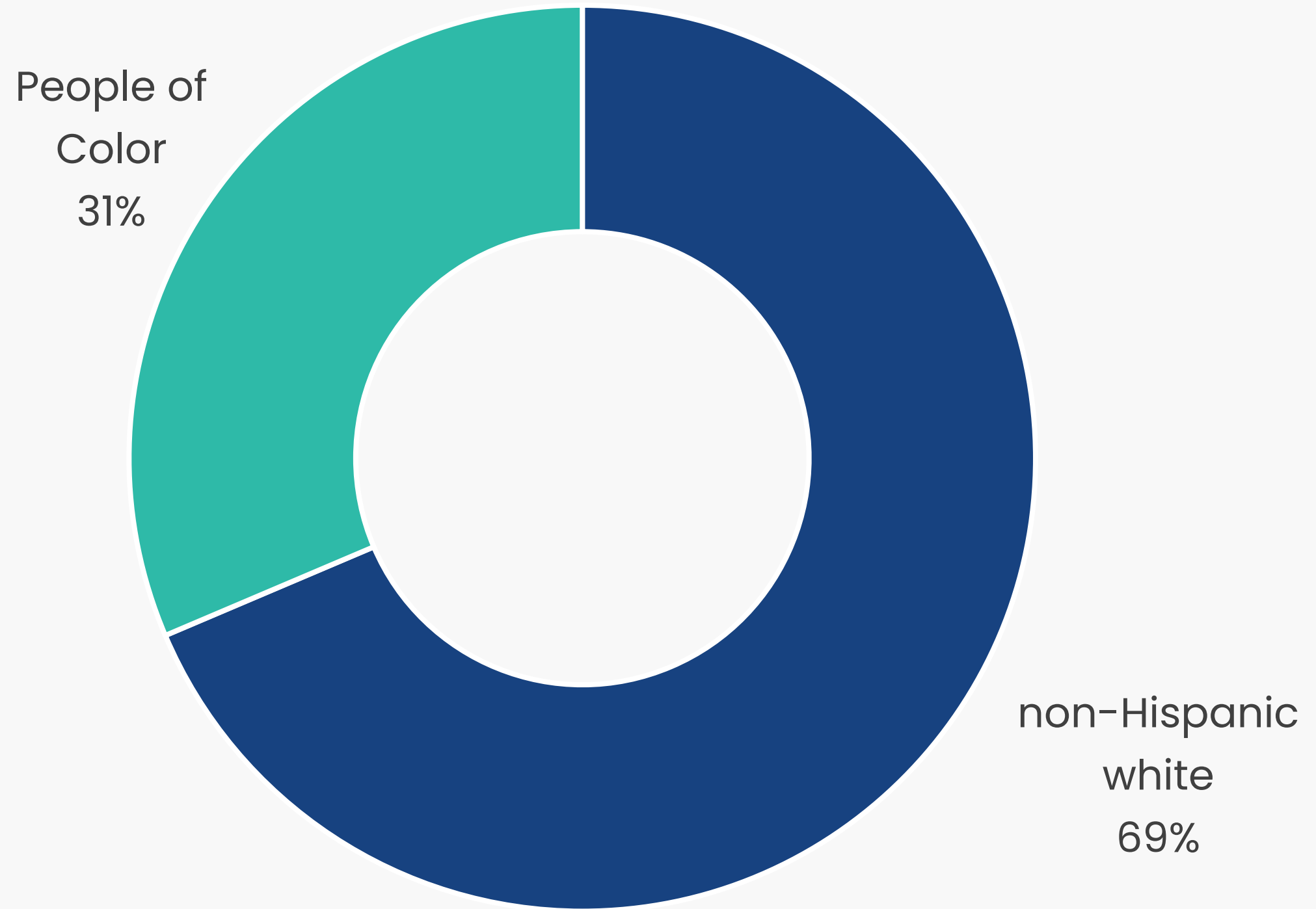
Average adult age: 45.7
Average child age: 7.9
Average party size: 2.3

Party Ages

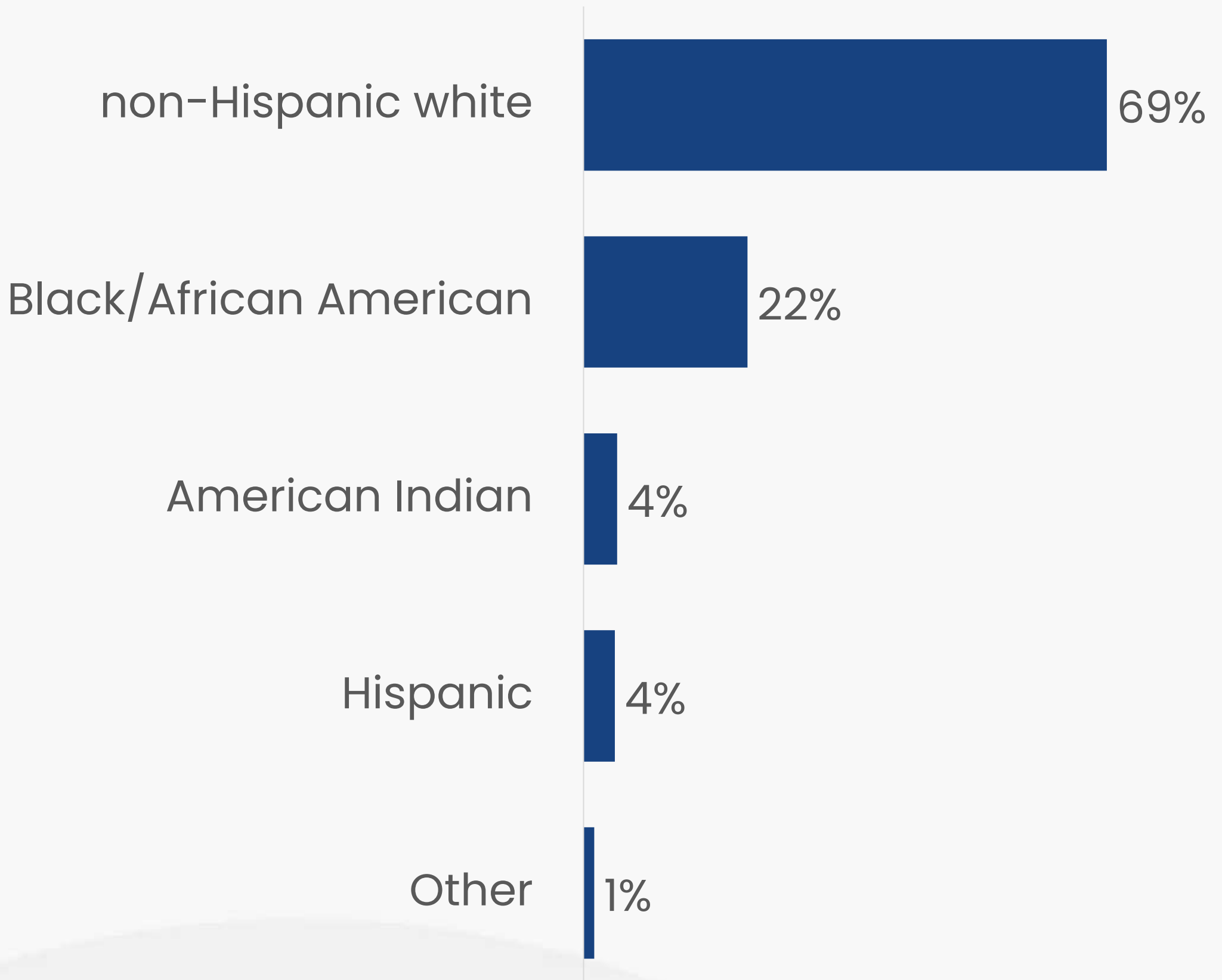


Nearly one-third (31%) of Fayetteville, NC/Cumberland County visitors are People of Color.

Visitor Race/Ethnicity Overall

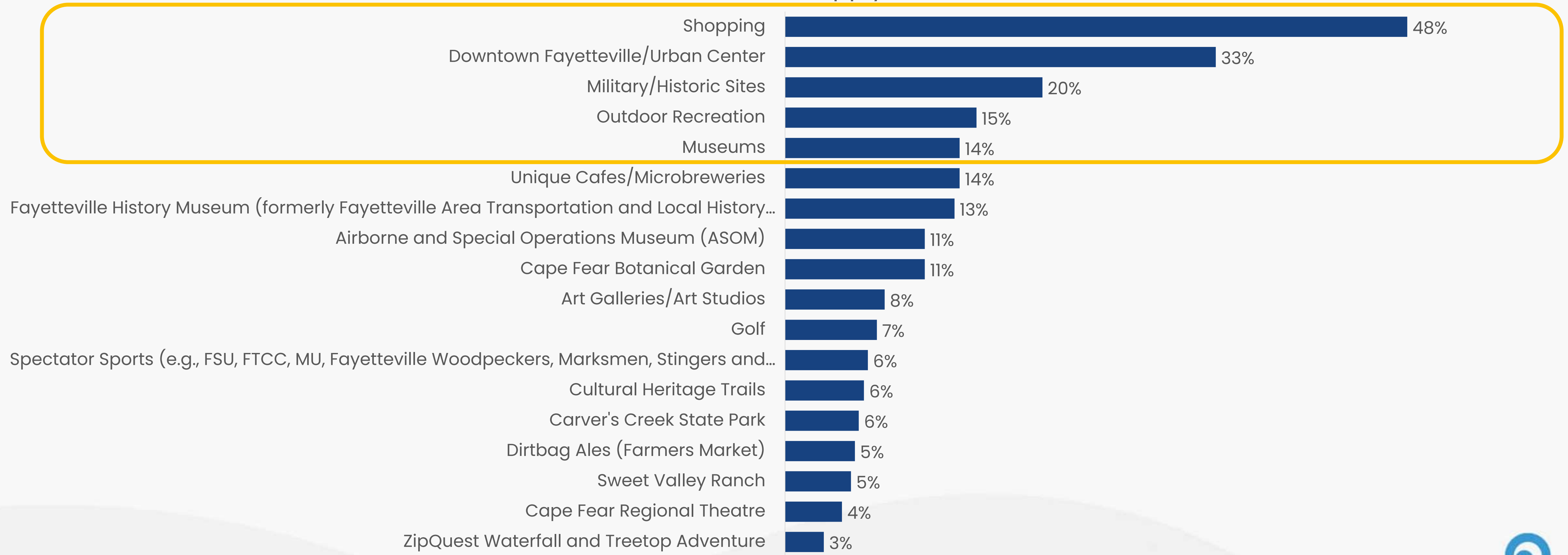


Visitor Race/Ethnicity



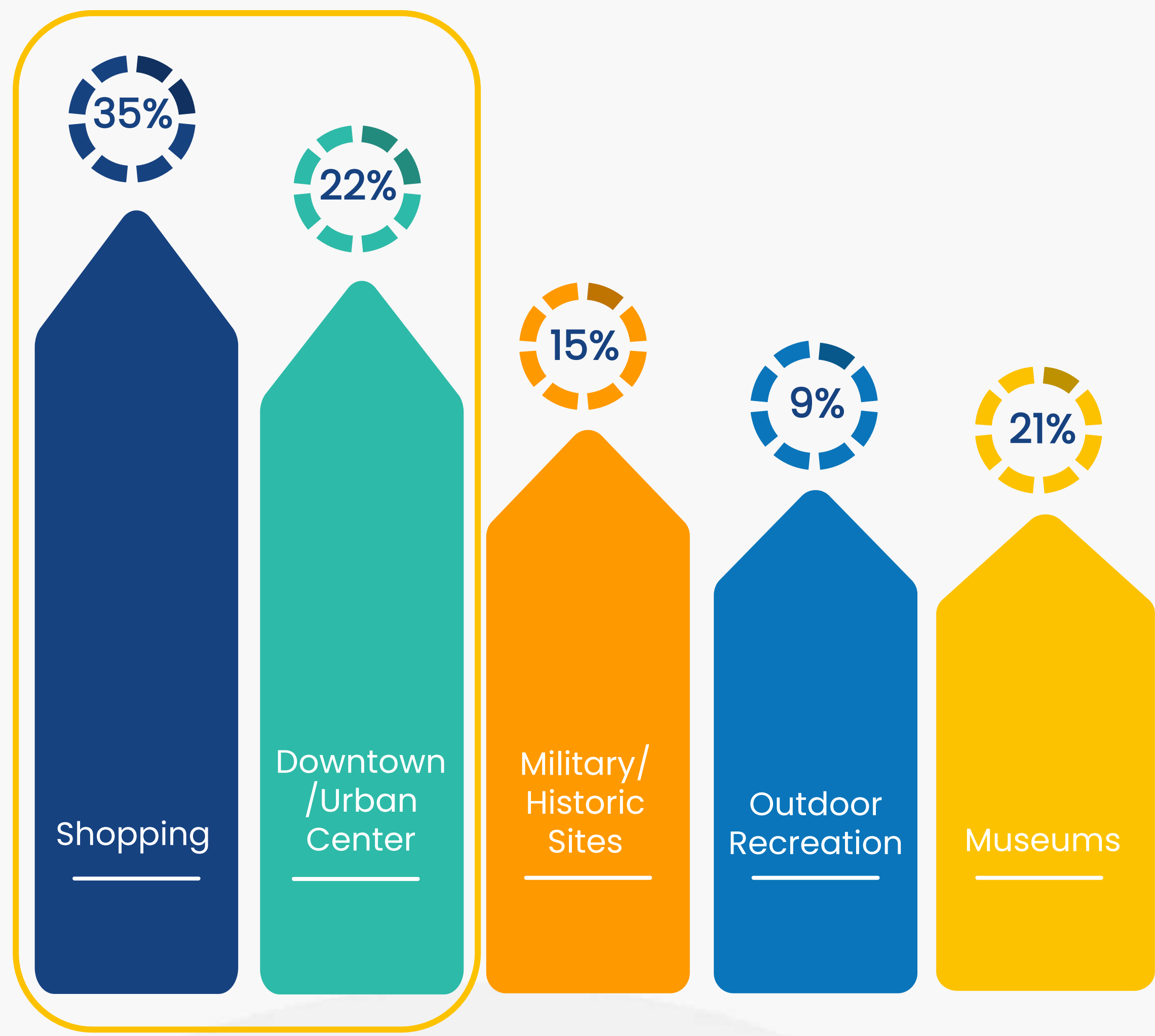
The activities recent Fayetteville, NC/Cumberland County visitors were most likely to have engaged in included Shopping, Downtown, Military/Historic Sites, Outdoor Recreation and visiting Museums.

Activities Engaged In
Select All That Apply



Fayetteville, NC/Cumberland County Choice Drivers

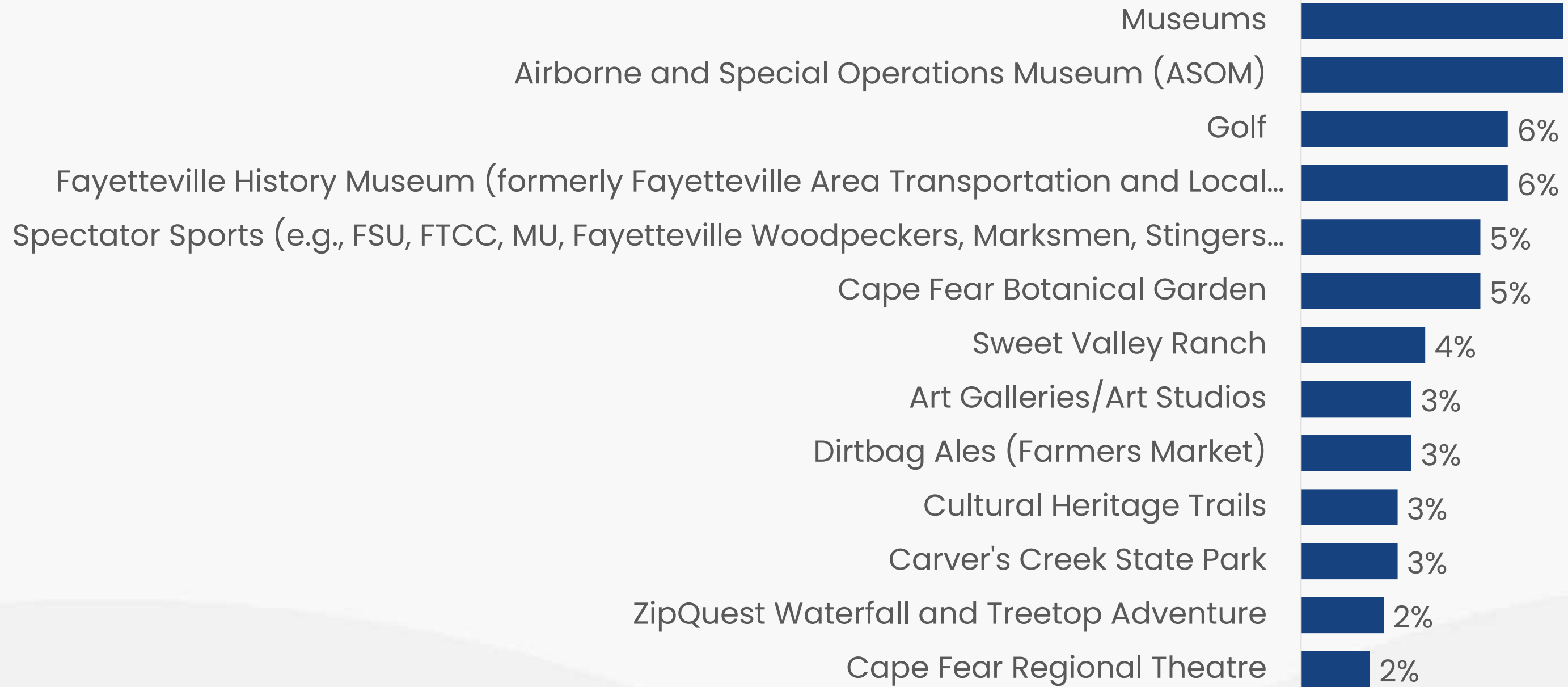
Of all the area activities visitors engaged in while visiting the Fayetteville, NC/Cumberland County area, those most responsible for inspiring the trip (functional drivers) were Shopping, Downtown/Urban Center and Military/Historic Sites.



Shopping once again scored significantly higher as a functional driver to the area than the other Fayetteville, NC/Cumberland County activities.

Functional Drivers of Visitation

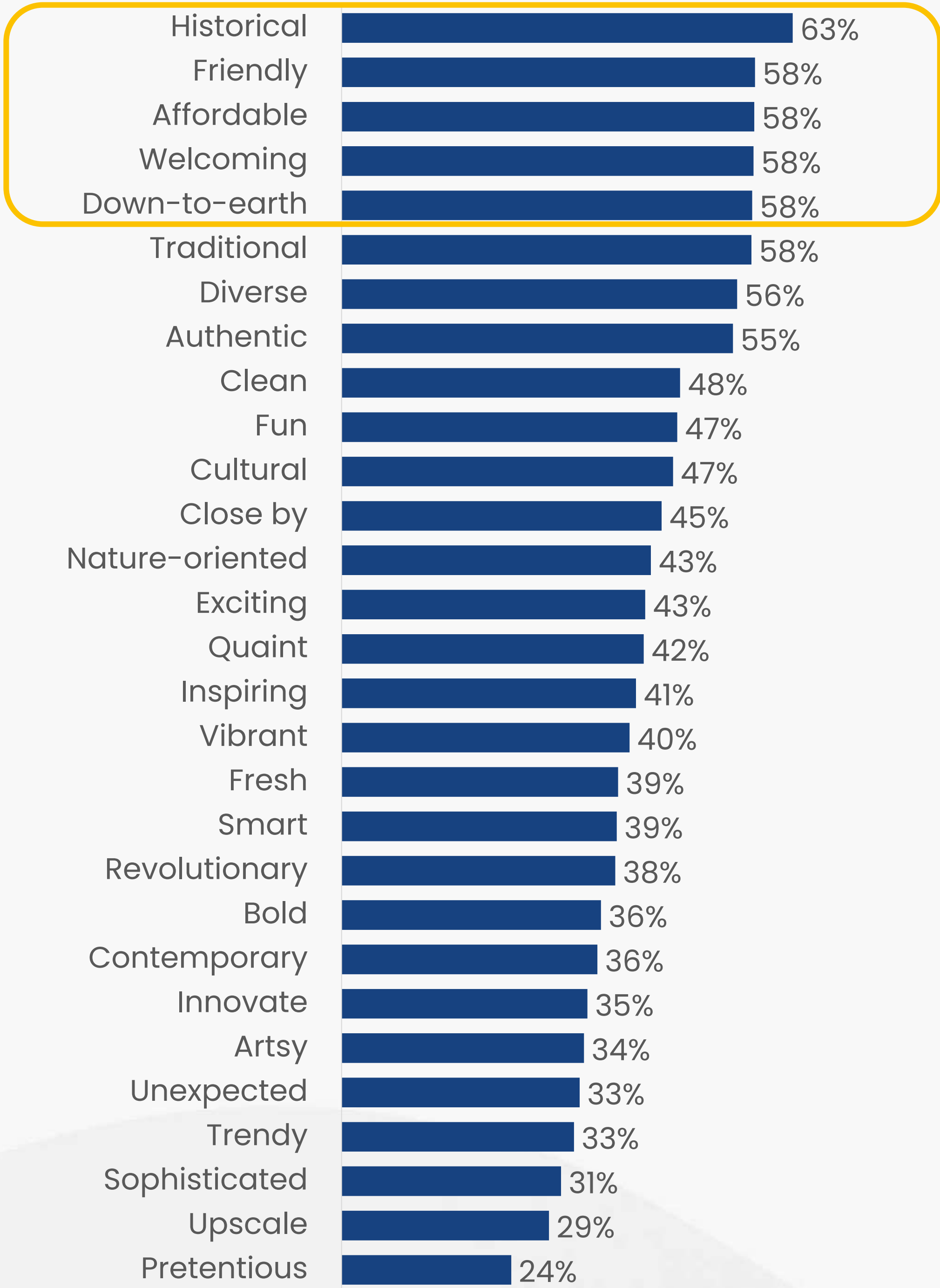
Select Top 3



Fayetteville, NC/Cumberland County Brand Characteristics

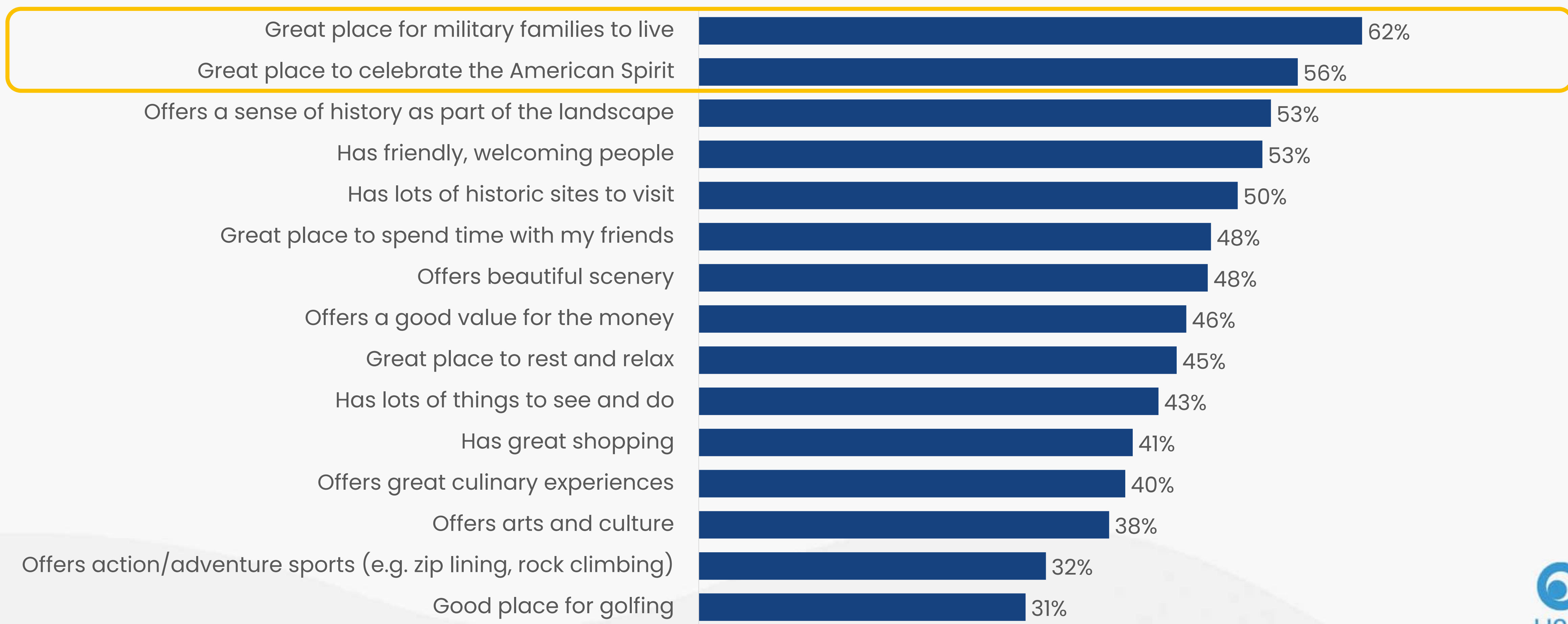
The characteristics prospects feel best describe Fayetteville, NC/Cumberland County include Historical, Welcoming, Diverse, Traditional and Friendly.

The biggest discrepancies between non-Hispanic white visitors and People of Color are Trendy (-19 pts), Contemporary (-17 pts) and Revolutionary (-16 pts). Both visitor groups agreed that Fayetteville is Quaint, Historical and Affordable.



Fayetteville, NC/Cumberland County's top descriptors revolve around the military/patriotism—in line with unaided descriptions of the area.

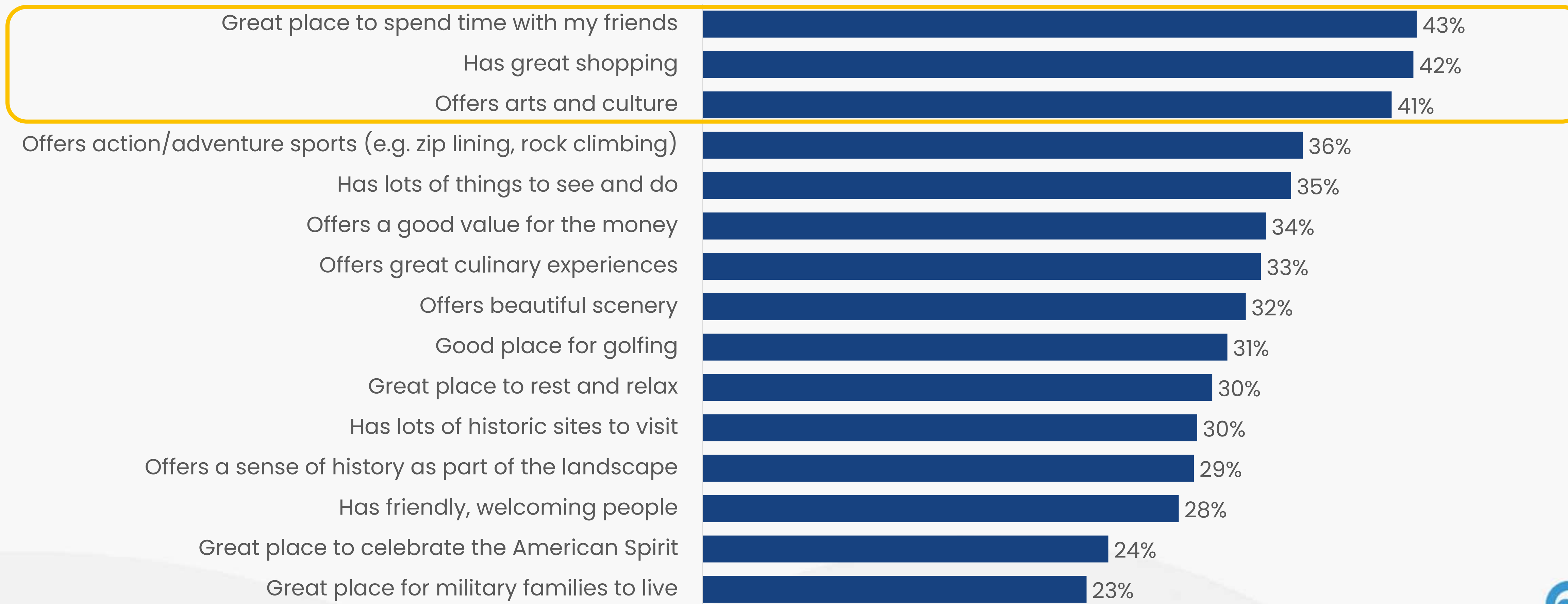
Attributes/Characteristics Describing Fayetteville, NC/Cumberland County
% Describes Very Well/Perfectly



By correlating Fayetteville, NC/Cumberland County's brand perception with intent to visit ratings, brand attributes that align most closely with intentions can be identified and help to highlight the area's Unique Selling Point(s), e.g., time with friends, shopping, arts & culture, etc.

Choice Drivers: Fayetteville, NC/Cumberland County Brand Attributes Correlated with Intent

% Correlation with Intent to Visit



H2R Strengths Finder



Each of the travel attributes has been analyzed and segmented into four buckets in the chart on the following slide. Strengths Finder evaluates the relative importance of each element of the brand alongside visitors' scores for each attribute as it relates to Fayetteville, NC/Cumberland County.

Respondents' scores for importance are plotted on the X-axis while the scores for how well they describe Fayetteville, NC/Cumberland County are plotted on the Y-axis. The average scores for each create the breaking points for the quadrants.

The resulting analysis illustrates which elements are most important by plotting each characteristic into one of four quadrants.

Fayetteville, NC/Cumberland County has numerous strengths such as beautiful scenery, friendly people, and lots of historic sites to visit. The concerns, include great value for the money, great culinary experiences, and great place to rest/relax.



Visitor Profile – Resident vs Tourist

Not surprisingly, tourist visitors are much more likely to have spent the night in the area and visited for vacation/leisure getaway

Tourist visitors skew toward family parties, are slightly younger and report spending a bit less which is also slightly different than what was recorded in 2021.

		All Visitors	Resident Visitors	Tourist Visitors
Segment Size		100%	13%	87%
% Visited Earlier This Year		45%	81%	31%
Overnight vs. Day-Trip	% Day Trip	38%	70%	25%
	% Stayed Overnight	62%	30%	75%
	Avg. Nights Stayed	2.5	3.3	2.4
Purpose of Visit	Vacation/Weekend Getaway	22%	7%	28%
	VFR	33%	27%	35%
	Business/Bleisure	12%	16%	10%
	All Other	33%	51%	26%
Party Composition	Average Adult Age	45.7	47.7	45.0
	Average Child Age	7.9	8.1	7.8
	Party Size	2.3	2.0	2.4
	% Family Parties	50%	40%	53%
	% Adult Parties	50%	60%	47%
Spending	Per Party	\$234	\$291	\$223
	Per Person	\$102	\$145	\$93
Intent to Return	% Probably/Definitely Will	34%	70%	29%

01. Traveler Sentiment

02. Brand Health

03. Visitor Profile

04. Barriers to Visitation

05. Categorization

FAYETTEVILLE NON-VISITORS | N=215
FAYETTEVILLE LAPSED VISITORS | N=297

Non-visitors were asked to explain why they have not visited Fayetteville in their own words. Using Artificial Intelligence, comments were summarized with the top issues being:

Many people have not visited Fayetteville due to its distance, lack of attraction offerings or reputation as a military town with high crime.

COVID-19 limited travel for some.

Some preferred to travel to other destinations, including those with more cultural or outdoor options, family or friend connections, or where they previously lived or worked.

Some had health issues, family tragedies, or retired from the military in the area.

A few found the town unsafe, dirty or unappealing, while others had no opinion or information about it.

Lack of desire or interest in visiting Fayetteville.

Busy schedules and not enough time or opportunity to visit.

Overall, the greatest stated barriers to visiting Fayetteville, NC/Cumberland County include preference for other places, never comes to mind, no must sees and a lack of recommendations.

Stated Barriers to Visiting Fayetteville, NC/Cumberland County

% Agree/Strongly Agree



Top derived hurdles for visitation are a preference for other places, no "must sees," and nothing new of interest followed by never comes to mind and seldom changes.

STATED HURDLES

1. Have other places that I prefer to visit (65%)
2. Just never comes to mind (52%)
3. No "must sees" that are compelling me to visit (46%)
4. Have not had anyone recommend it to me (45%)
5. Don't know enough about it to make an informed decision (37%)
6. Nothing new of interest that I would like to experience (36%)
7. Things to do in this destination don't change very often (35%)
8. Not for me/not interested in this destination (33%)
9. Inconveniently located for me/too far away (32%)
10. Been there, done that/Looking for new places to visit (32%)

DERIVED HURDLES

1. Not for me/not interested in this destination (-24%)
2. Have other places that I prefer to visit (-23%)
3. No "must sees" that are compelling me to visit (-21%)
4. Nothing new of interest that I would like to experience (-18%)
5. Just never comes to mind (-16%)
6. Things to do in this destination don't change very often (-16%)
7. Have not had anyone recommend it to me (-15%)
8. Does not offer enough variety to entertain everyone (-12%)
9. Been there, done that/Looking for new places to visit (-9%)
10. Inconveniently located for me/too far away (-6%)

01. Traveler Sentiment

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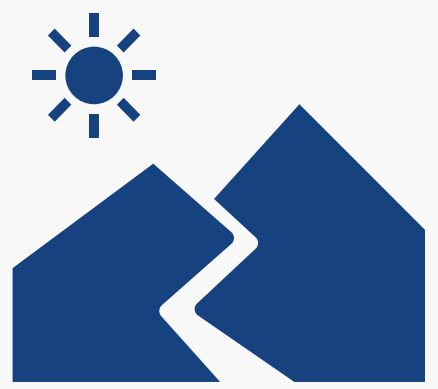
ALL RESPONDENTS | N=800

Demographics

		Overall	Recent Visitors	Lapsed Visitors	Non-Visitors
Gender	Male	35%	39%	34%	21%
	Female	65%	61%	66%	79%
Respondent Age	Avg. Age	47.7	45.9	51.4	44.6
	18-34 Years	29%	32%	22%	32%
	35-54 Years	34%	35%	32%	39%
	55+ Years	37%	33%	46%	29%
Average Household Income		\$91.1k	\$93.5k	\$83.0k	\$94.4k
Household Income	<\$75k	40%	38%	46%	41%
	\$75k+	60%	62%	54%	59%
Household Ages	Under 12 Years	15%	19%	13%	9%
	12-17 Years	7%	8%	8%	6%
	18-34 Years	24%	23%	21%	28%
	35-54 Years	26%	25%	25%	27%
	55+ Years	28%	25%	32%	31%
Household Size		2.5	2.6	2.5	2.4
Household Composition	Families	51%	58%	48%	39%
	Adults	49%	42%	52%	61%
Ethnicity	non-Hispanic white	71%	69%	72%	72%
	People of Color	29%	31%	28%	28%

Given the census number of hotel rooms in the Fayetteville, NC/ Cumberland County area, the preponderance of data points from STR and this Visitor Market Profile Study indicates the area attracted roughly 2.87 million visitors over the past 12 months.

Fayetteville/Cumberland County Lodging Multiplier Model of Projected Visitation



63%
STR
Occupancy
Rate
Last 12 Months



6,371
STR Census
Number of Hotel
Rooms in the
Fayetteville Area



62%
Fayetteville/
Cumberland
County's
Visitors who
Spend Night



47%
% of Overnight
Guests Who Stay
in Area
Hotels/Motels

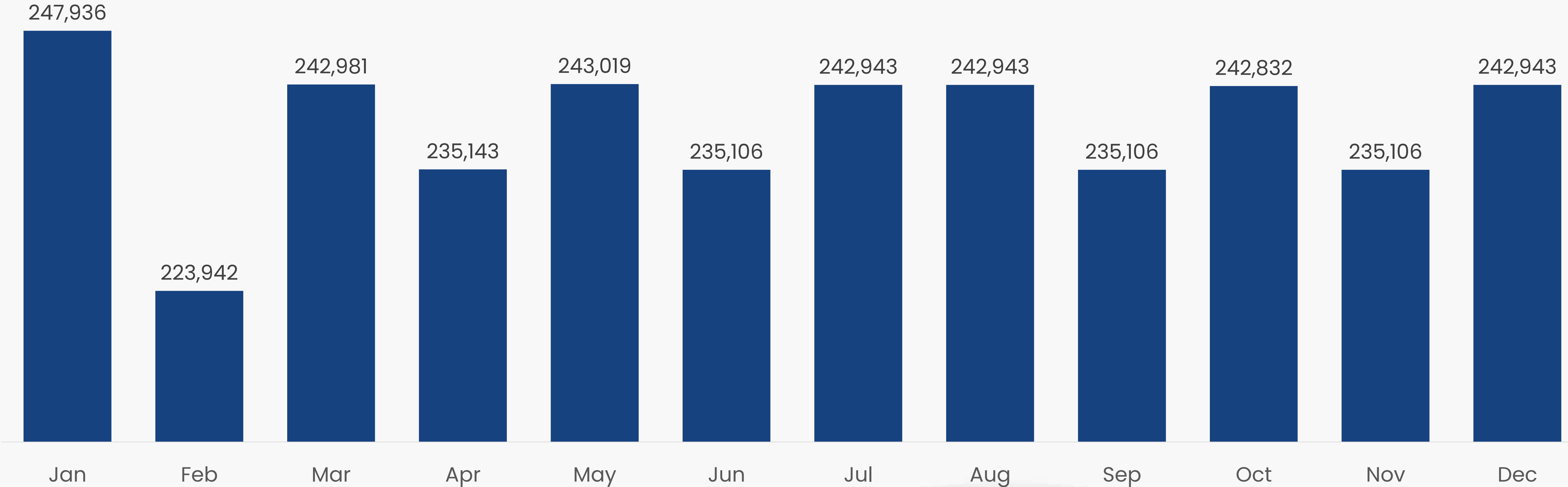


2.87M
Est. Number of
Overnight Visitors
to Fayetteville/
Cumberland Co.

Source: Lodging Multiplier Visitation Projection Model

Fayetteville, NC/Cumberland County's 2.87M projected overnight visitors is distributed commensurate with STR room demand and indicates Spring (Mar-May) delivered the largest number of visits (721.1k) followed very closely by Summer (Jun-Aug) at 721.0k.

Fayetteville/Cumberland County's Projected Visitation by Month

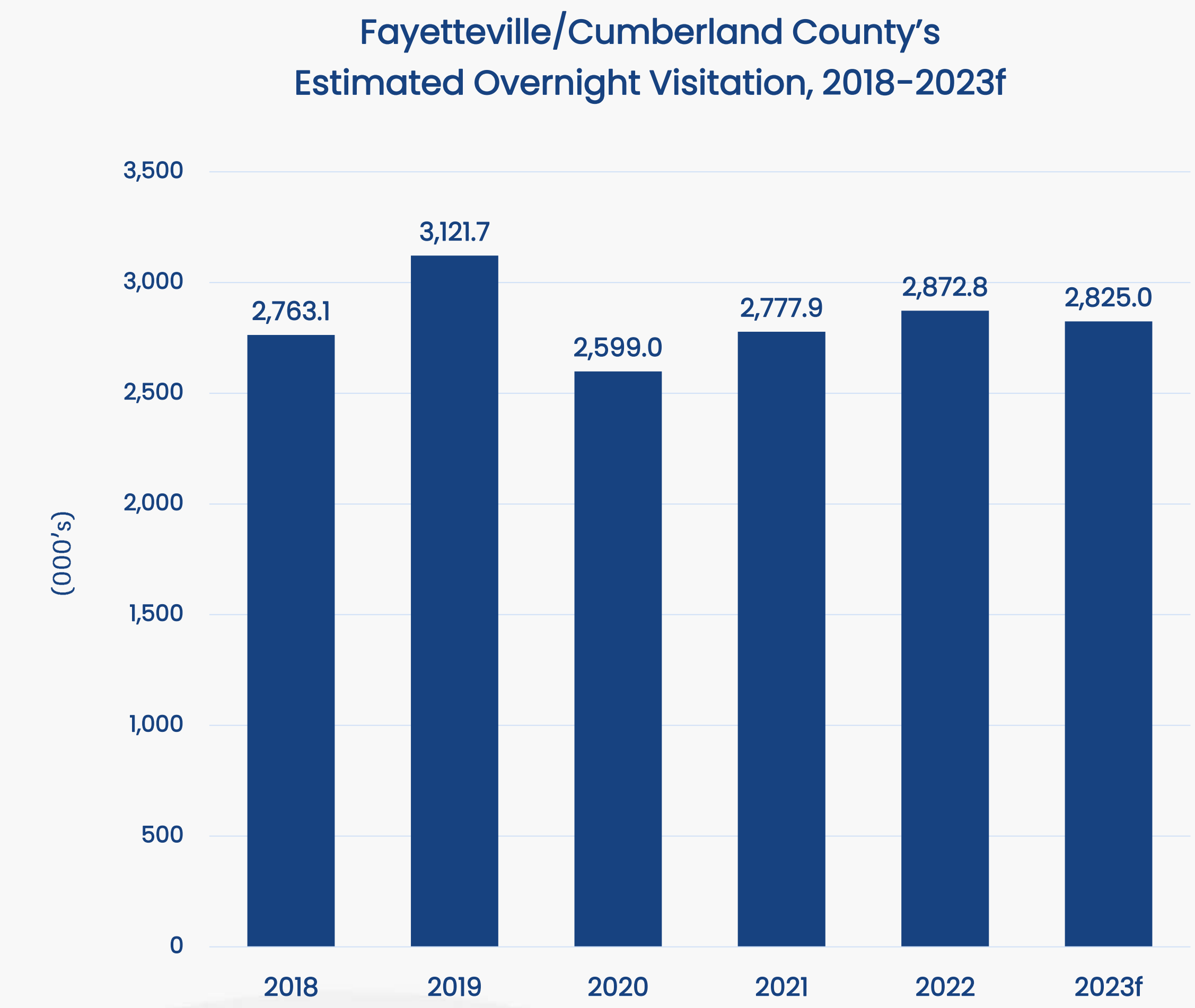


Distribution in same ratio as STR's monthly room demand, Jan-Dec 2022



Estimating Fayetteville, NC/Cumberland County's Overnight Visitation for the Past 5 Years

	2018	2019	2020	2021	2022	2023f
Fiscal Year Room Demand % Var.	-5.9%	+10.5%	-16.6%	+13.0%	+4.1%	-2.0%
Fiscal Year Occupancy Tax % Var.	-1.7%	+17.9%	-17.1%	-5.3%	+2.0%	-1.0%
Fiscal Year Weighted* % Var	-4.5%	+13.0%	-16.7%	+6.9%	+3.4%	-1.7%



*Weighting = 2/3 Room Demand Variance + 1/3 Occupancy Tax Variance

NOTE: Occupancy tax variance is estimated for 2021 (through April), but is guessed for 2022 and 2023, and needs to be updated with the current figures.

Research developed for Fayetteville Area Convention & Visitors Bureau 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.

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