FACVB

Foundational Tourism Research

FACVB

Tourism Research Partners

CUMBERLAND COUNTY, NC
FAYETTEVILLE
AREA
CONVENTION AND VISITORS BUREAU

GREATER FAYETTEVILLE CHAMBER
YOUR CAN DO CHAMBER SINCE 1899

COOL SPRING
DOWNTOWN DISTRICT

Who We Are

Our Mission

To position Fayetteville/ Cumberland County as a destination for conventions, tournaments, and individual travel.

Tourism Marketing

The FACVB is the Tourism Marketing Arm of Fayetteville and Cumberland County fueled by Research-Based Marketing.

Project Overview

Stakeholder Study

The Stakeholder Study provided insights from local stakeholders.

Included were stakeholders from:

- FACVB
- Greater Fayetteville Chamber
- Cool Spring Downtown District

Scout Report

The Scout Report provided real-time data (phone signals) to be able to show the geographic distribution of Fayetteville/Cumberland County's visitors fueled by visitors from outside Cumberland County.

Tourism Market Study

The Tourism Market Study targeted regional travelers to assess and measure traveler sentiment, brand health, visitor profile, and barriers to visitation.

The consumer truths generated from this research will provide the launching point for the FACVB's new Strategic Marketing & Media Plan moving forward in 2022 & Beyond.

Stakeholder Study

Top 5

Areas Cumberland County Excels

1.	Military/Government	54%
2.	Downtown District	27%
3.	Accommodations/Food Service	21%
4.	Arts & Entertainment	17%
5.	Travel, Tourism, and Attractions	16%

Greatest Interest to Travelers

1.	Military/Historical Sites	45%
2.	Airborne & Special Ops Museum (ASOM)	43%
3.	Cape Fear Botanical Garden	34%
4.	Spectator Sports	29%
5.	Museums	27%

Words/Phrases Stakeholders Feel Best Describes the Community

Place with a sense of history & military presence.

City with lots of diversity.

Great place to meet interesting people.

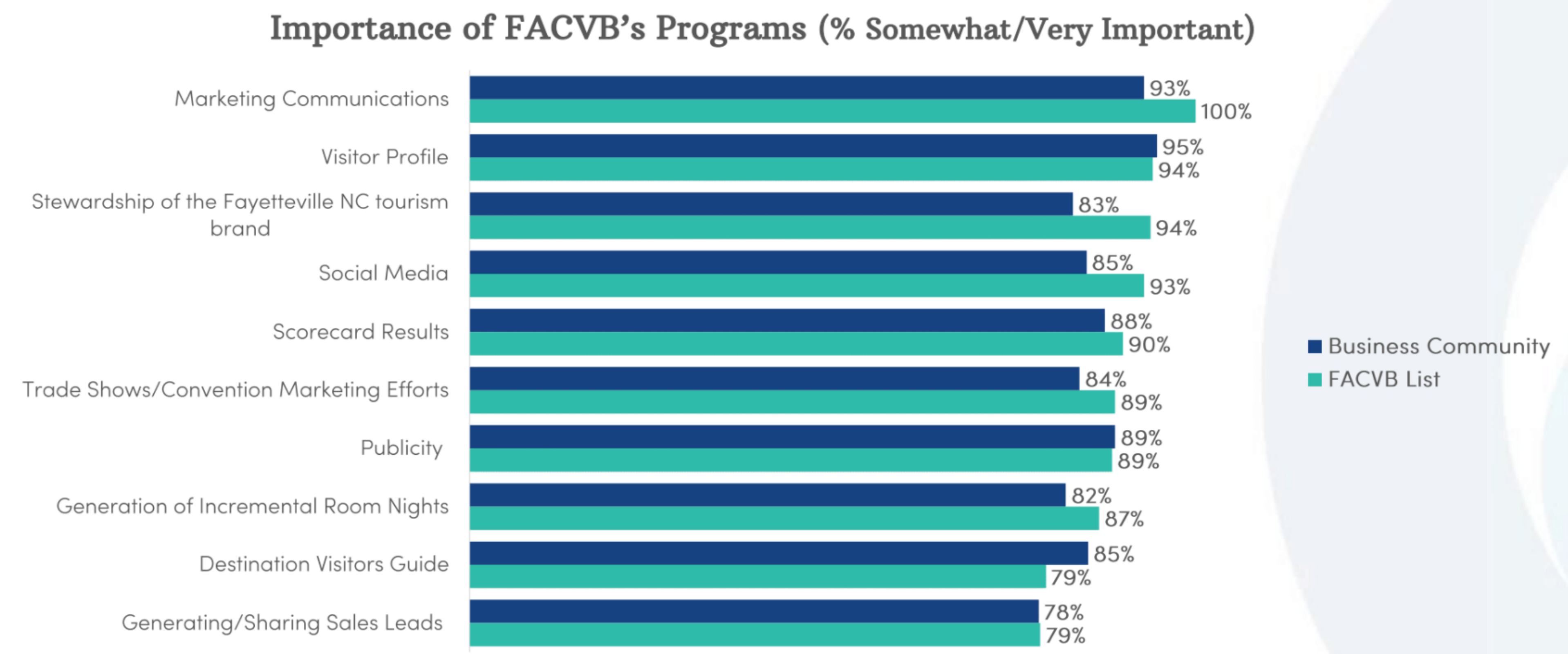
Diverse strengths provide a welcome surprise.

Community with lots of growth.

Stakeholder Study

Specific Questions Regarding the FACVB.

FACVB member/partners feel the FACVB's most important programs/actions are Marketing Communications, the Visitor Profile and Stewardship of the Community's Tourism Brand.



Stakeholder Study

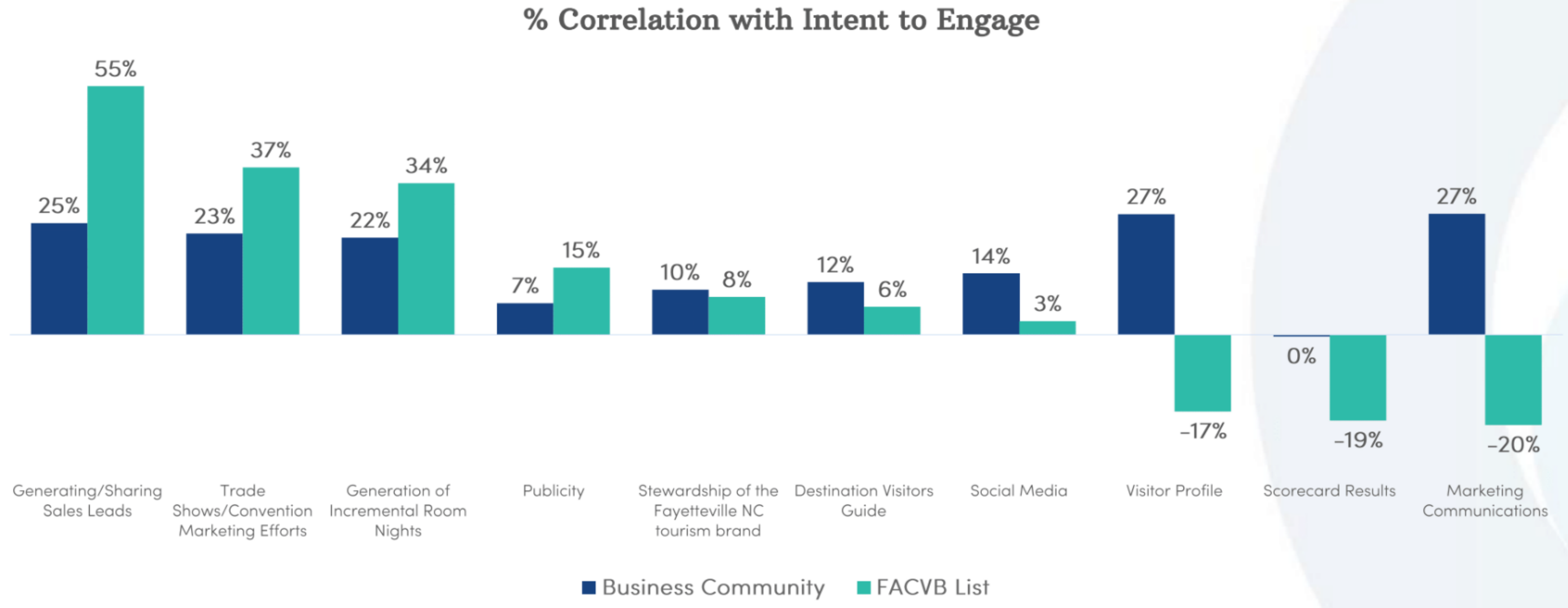
Specific Questions Regarding the FACVB.

When evaluating attribute importance with satisfaction, FACVB member/partners indicate the organization's strengths are many and concerns are few. Surprisingly, members rate the generation of incremental room nights and sales leads as being below average in both importance and satisfaction.

Stakeholder Study

Specific Questions Regarding the FACVB.

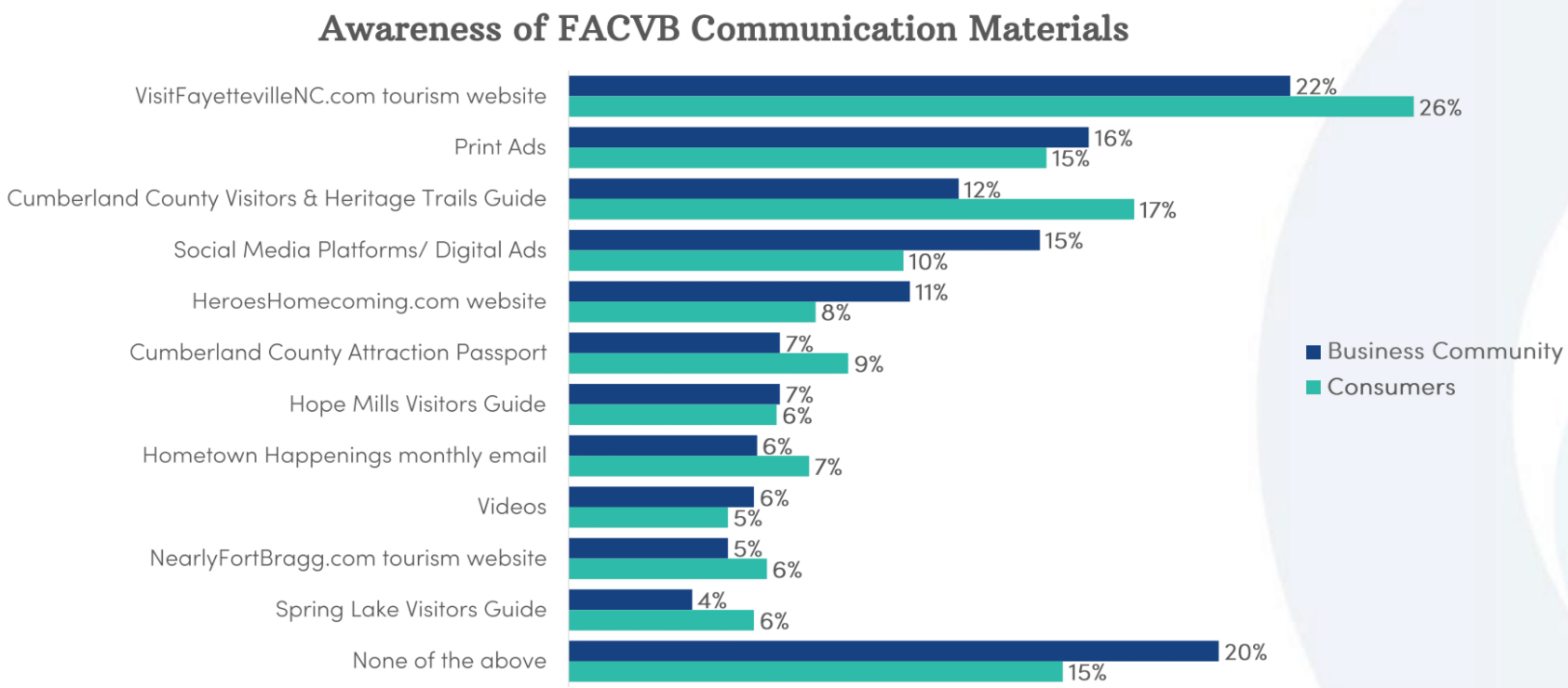
FACVB's unique selling point among constituents is its Generation of Sales Leads, Trade Show Marketing and Delivery of Incremental Room Nights.



Stakeholder Study

Specific Questions Regarding the FACVB.

Overall, business stakeholders are most familiar with the tourism website, print ads and social media while consumers have a bit more familiarity with the Visitor & Heritage Trails Guide.



Scout Report

The Scout Report is an interactive report that will change depending on the criteria selected.

The following pings are NOT included in this report:

- Normally sleeps in Cumberland County
- Normally works in Cumberland County
- Stayed for less than 4 hours

BDI = Brand Development Index

H2R Scout Report
Location. Visitation. Intelligence.

Cumberland County, NC

2019 Visitation Trends

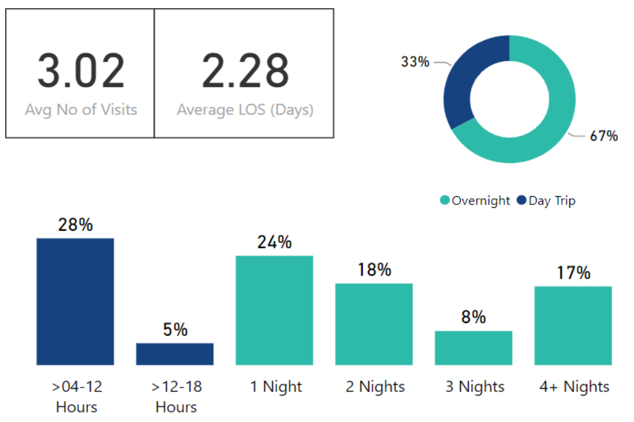
DMA	%	BDI
RALEIGH-DURHAM	45.69%	4,973.90
MYRTLE BEACH-FLORENCE	8.55%	3,521.88
WILMINGTON	3.27%	2,275.72
GREENVILLE-NEW BERN-WASHINGTON	2.17%	856.89
GREENSBORO-HIGH POINT-WINSTON SALEM	2.45%	440.68
CHARLOTTE	3.67%	388.91
SAVANNAH	0.85%	298.84
COLUMBIA, SC	1.36%	292.53
CHARLESTON, SC	0.92%	263.60
AUGUSTA	0.51%	231.25
NORFOLK-PORTSMOUTH-NEWPORT NEWS	1.39%	228.46
DOTHAN	0.16%	192.32
RICHMOND-PETERSBURG	0.84%	187.25
COLUMBUS, GA	0.33%	183.74
GREENVILLE-SPARTANBURG-ASHEVILLE	1.07%	154.80
JACKSONVILLE	0.75%	134.91
WATERTOWN	0.10%	129.08
CHARLOTTESVILLE	0.08%	106.57
WASHINGTON, DC-HAGRSTWN	2.17%	106.18
ORLANDO-DAYTONA BEACH-MELBOURNE	1.24%	105.67
MOBILE-PENSACOLA	0.44%	102.20
FAIRBANKS	0.04%	101.75
SALISBURY	0.12%	94.07
ALEXANDRIA, LA	0.10%	91.77
MACON	0.19%	91.59
COLORADO SPRINGS-PUEBLO	0.26%	89.41
PANAMA CITY	0.10%	83.46
WACO-TEMPLE-BRYAN	0.26%	81.95
ATLANTA	1.60%	79.35
TAMPA-ST PETERSBURG-SARASOTA	1.10%	79.14
BALTIMORE	0.73%	79.05
Total	100.00%	100.00

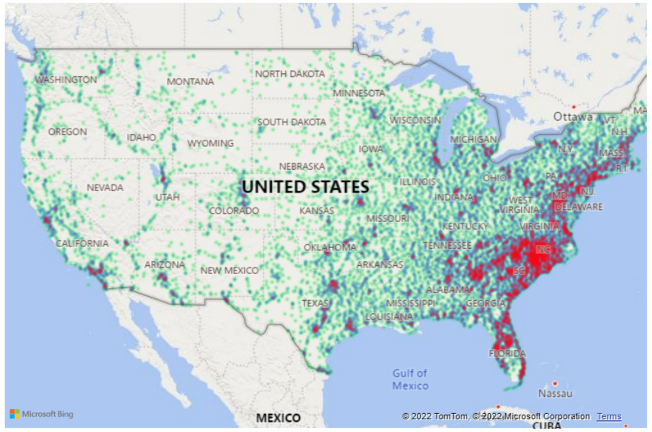
Report prepared by H2R Market Research

Based on 1281485 data points

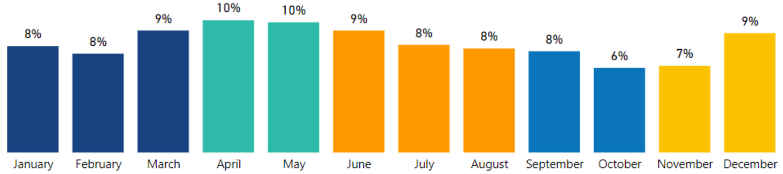
The Cumberland County, NC Scout Report contains 1,281,485 domestic data pings that entered the geofence around Cumberland County, NC in 2019. These pings do **not** include those who live or work in the geofence, nor those who were in the geofence for less than 4 hours.

Length of Stay

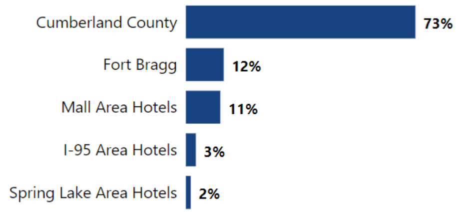




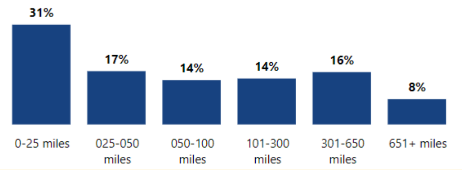
Visitation by Month



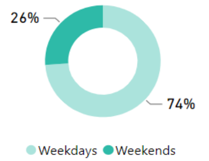
Points of Interest Market Share



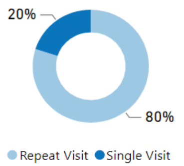
Visitation by Distance



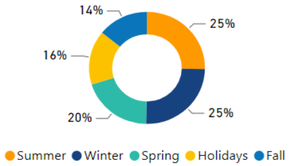
Weekends vs. Weekdays



Repeat vs. Single Visits



Visitation by Season



Scout Report

Filter to Provide a Dynamic Profile by Market (Savannah)

H2R Scout Report
Location. Visitation. Intelligence.

Cumberland County, NC

2019 Visitation Trends

DMA	%	BDI
RALEIGH-DURHAM	45.69%	4,973.90
MYRTLE BEACH-FLORENCE	8.55%	3,521.88
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SAVANNAH	0.85%	[illegible]
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AUGUSTA	0.51%	231.25
NORFOLK-PORTSMOUTH-NEWPORT NEWS	1.39%	228.46
DOTHAN	0.16%	192.32
RICHMOND-PETERSBURG	0.84%	187.25
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TAMPA-ST PETERSBURG-SARASOTA	1.10%	79.14
BALTIMORE	0.73%	79.05
Total	100.00%	100.00

Report prepared by H2R Market Research

Based on 10864 data points

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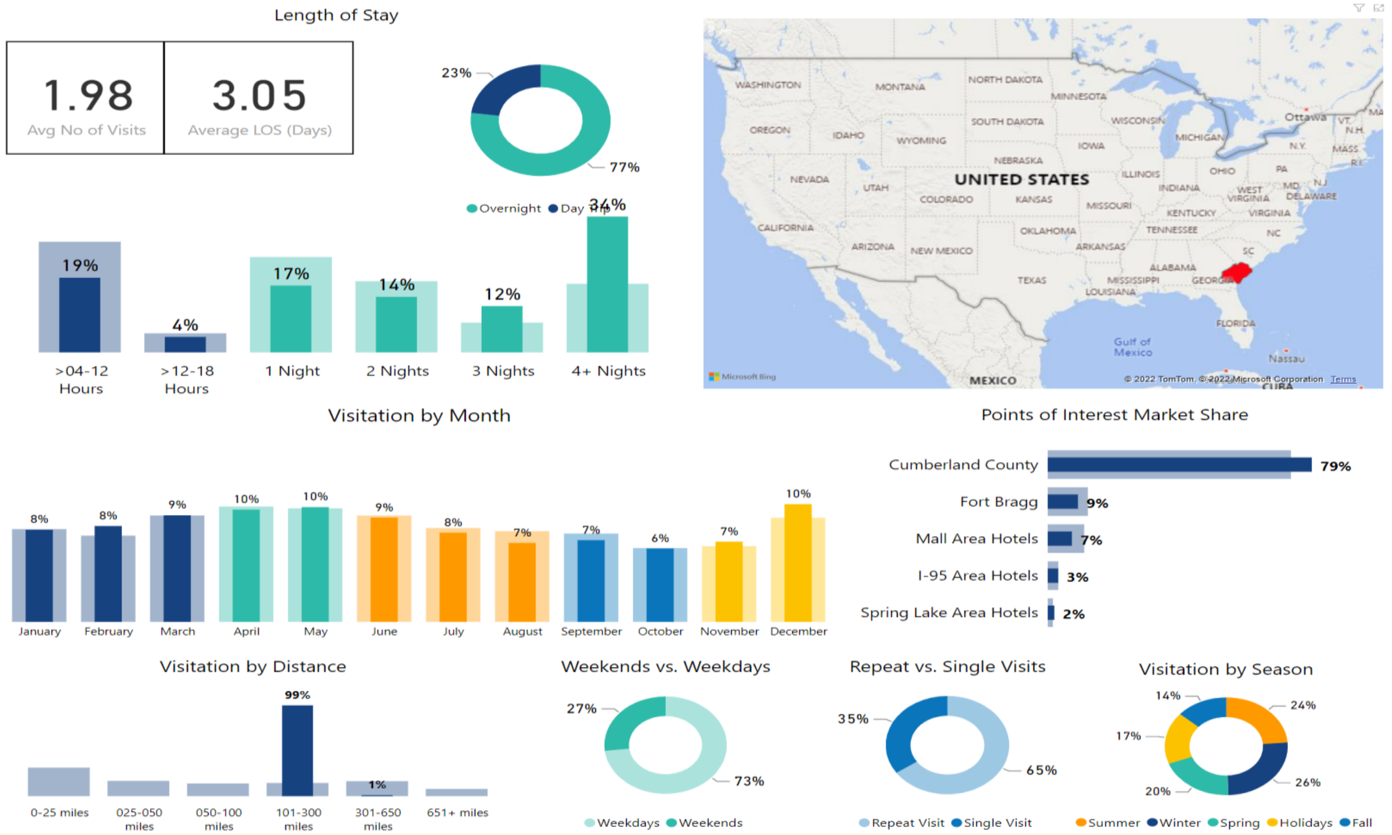

Scout Report

Filter to Provide a Dynamic Profile by POI/Region (Fort Bragg)

H2R Scout Report
Location. Visitation. Intelligence.

Cumberland County, NC
2019 Visitation Trends

DMA	%	BDI
RALEIGH-DURHAM	68.44%	7,449.94
MYRTLE BEACH-FLORENCE	1.89%	779.98
WILMINGTON	0.69%	482.43
GREENVILLE-NEW BERN-WASHINGTON	0.77%	302.02
DOTHAN	0.24%	296.37
COLUMBUS, GA	0.53%	293.75
SAVANNAH	0.64%	225.03
WATERTOWN	0.18%	221.61
GREENSBORO-HIGH POINT-WINSTON SALEM	1.11%	198.93
ALEXANDRIA, LA	0.20%	183.93
CHARLOTTE	1.71%	180.91
AUGUSTA	0.38%	174.59
COLUMBIA, SC	0.80%	171.52
FAIRBANKS	0.06%	167.60
EL PASO	0.48%	148.32
WICHITA FALLS-LAWTON	0.20%	144.72
COLORADO SPRINGS-PUEBLO	0.41%	140.28
WACO-TEMPLE-BRYAN	0.42%	134.97
MOBILE-PENSACOLA	0.57%	131.75
ANCHORAGE	0.18%	130.69
NORFOLK-PORTSMOUTH-NEWPORT NEWS	0.76%	124.22
CHARLESTON, SC	0.41%	117.65
PANAMA CITY	0.12%	99.82
NASHVILLE	0.84%	99.73
GREENVILLE-SPARTANBURG-ASHEVILLE	0.65%	93.49
RICHMOND-PETERSBURG	0.42%	93.32
CHARLOTTESVILLE	0.06%	78.68
WASHINGTON, DC-HAGRSTWN	1.29%	63.20
SAN ANTONIO	0.45%	58.22
SPRINGFIELD, MO	0.26%	54.05
HUNTSVILLE-DECATUR-FLORENCE	0.17%	53.68
Total	**100.00%**	**100.00**

Report prepared by H2R Market Research

Based on 153144 data points

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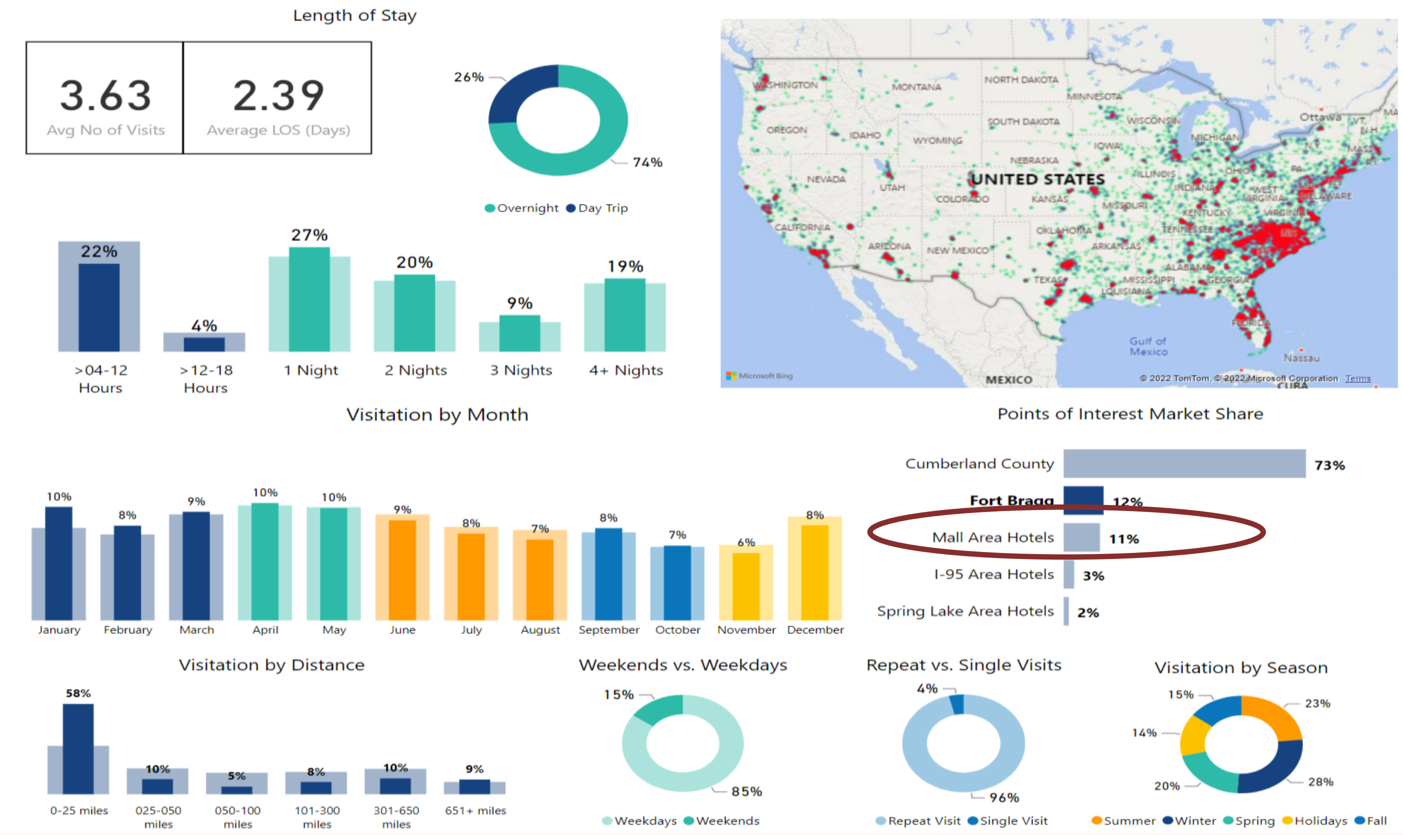

Scout Report

So Now What?

- This report helps us identify the markets with the greatest upside opportunity;
- We can research the repeatability, length of stay, and nature of visits from individual markets we’re considering;
- Targeting the lowest-hanging fruit will enable us to increase incremental visits and tourism spending and deliver more bang for the buck;
- And in time, if we convert these percentages of the total into estimated visitation by market, we can then begin to measure Year Over Year (YoY) performed by advertised market.

Tourism Market Study

COVID-19 shut down tourism, confined us to our homes and altered the way we do business.

- As the Omicron Variant of COVID-19 was approaching, regional travelers were asked how close to a return to normal they feel different activities had become. Across various aspects of life, respondents indicated they are at about 53% normal.

- Those activities that had returned to be closest to normal included:

1. Relationships with family (64%)
2. Relationships with friends (60%),
3. Enjoy living in my community (57%)
4. Ability to enjoy Restaurants (55%)
5. Ability to feel safe (49%)

Tourism Market Study

Top 5

Reputation Comparison

1.	Charlotte, NC	78%
2.	Greensboro, NC	64%
3.	Durham, NC	60%
4.	Florence, SC	55%
5.	Fayetteville, NC (CC)	53%

Intention To Visit

1.	Charlotte, NC	58%
2.	Durham, NC	49%
3.	Greensboro, NC	47%
4.	Fayetteville, NC (CC)	44%
5.	Smithfield, NC	43%

What Visitors Engaged In

1.	Shopping	45%
2.	Downtown Fayetteville	29%
3.	Military/Historic Sites	19%
4.	Outdoor Recreation	17%
5.	Museums	14%

Functional Drivers of Visitation

1.	Shopping	31%
2.	Downtown/Urban Center	14%
3.	Military/Historic Sites	11%
4.	Outdoor Recreation	10%
5.	ASOM	5%

Emotional Drivers of Visitation

1.	Spend Time with Family/Friends	48%
2.	Other Family Members Wanted to Go	36%
3.	Escape Pressures of Everyday Life	27%
4.	Variety of Experiences for Adults/Kids	16%
5.	Experience Outdoors/Nature	15%
	Experience New Event Since Last Visit	15%

Primary Purpose of Visit

1.	Visit Friends/Family	29%
2.	Vacation/Getaway	19%
	Other	19%
3.	Passing Through	21%
4.	Business/Work	13%

Tourism Market Study

Barriers as to Why Tourists Have not visited in last 5 Years.

Stated Barriers

1. Have other places that I prefer to visit
2. Just never comes to mind
3. Have not had anyone recommend it to me
4. No "must sees" that are compelling me to visit
5. Don't know enough about the area to make an informed decision
6. Things to do in this destination don't change very often
7. Been there, done that/Looking for new places to visit
8. Nothing new of interest that I would like to experience
9. Not for me/not interested in this destination
10. Planning to visit next year

Derived Barriers

1. No "must sees" that are compelling me to visit
2. Have other places that I prefer to visit
3. Not for me/not interested in this destination
4. Just never comes to mind
5. Nothing new of interest that I would like to experience
6. Have not had anyone recommend it to me
7. Things to do in this destination don't change very often
8. Been there, done that/Looking for new places to visit
9. Does not offer enough variety to entertain both adults and children in my party
10. Online travel reviews have not been convincing

Summary

- **Research-driven marketing** will make Fayetteville/Cumberland County more competitive, successful, effective, and efficient because all major decisions are grounded in consumer truths.
- **Background.** We have and will align with local stakeholders and partners to determine precisely which markets are driving Fayetteville/Cumberland County tourism and have begun “peeling back the onion” to learn about area visitors at a much deeper level than ever before.
- **COVID changed everything.** It changed travelers’ attitudes, beliefs and behaviors. It disrupted habits in ways few other events have managed to do. Regional travelers remain far “normal” even as those habits slowly begin to be rebuilt. That just may provide the opportunity Fayetteville/Cumberland County needs to discover and execute its travel and tourism brand.

What We've Learned

- **Nearly a third remain hunkered down.** Many regional travelers remain hunkered down waiting for the danger to pass; fortunately, leisure and regional car travel appear to be rebounding more quickly than other types of travel.
- **Not a top-of-mind destination.** While travelers across the area have begun considering travel again, very few include Fayetteville/Cumberland County in their consideration set.
- **Lower key performance indicators** than competitors of similar size and scope. In fact, Fayetteville/Cumberland County's market share, reputation, share of voice, and level of intent to visit are all below average compared to the competitive set.
- **Differentiated by Patriotism.** Fayetteville/Cumberland County is not perceived as being very well differentiated by its inviting downtown, charm, museums, or even spectator sports as much as it is by Patriotism. The area owns "patriotism", but so far that does not appear to be connected in any meaningful way to tourism.
- **Economic driver for the community.** Regional travelers do spend quite a bit of money. The average leisure visitor party spends $877 (or $109 per person, per day) and the average business visitor spends $502 (or $171 per person, per day. **ALL TRAVELERS DELIVER VALUE TO THE AREA, AND MORE IS BETTER**.
- **Barriers to visitation.** Visitors do not believe there are any "must sees", it never comes to mind, or nobody has ever recommended it. **THE GOOD NEWS IS THAT MOST REASONS ARE FIXABLE.**

Team CVB

Team Member not pictured:
- Jennifer Thigpen


Randy Fiveash


Kelly Brill


Jennifer Betshlimon


David Nash


Amy Karpinski


Isaiah Griffin


Teletha Rodriquez


Joie Schubert


Haley Provencio


Cardel Hunt


Angie Brady


Kristy Grove

Contact Information

Fayetteville Area Convention and Visitors Bureau

245 Person Street
Fayetteville, NC 28301
(910) 483-5311

Randy Fiveash
Interim President & CEO (910) 835-5081
rfiveash@visitfayettevillenc.com

Kelly Brill
Director of Operations and HR (910) 835-5086
kbrill@visitfayettevillenc.com

David Nash
Director of IT and Data Management (910) 835-5087
dnash@visitfayettevillenc.com

Kristy Grove
Director of Communications (910) 835-5087
kgrove@visitfayettevillenc.com

Amy Karpinski
Director of Sports Marketing (910) 835-5089
akarpinski@visitfayettevillenc.com

Angie Brady
Director of Tourism Marketing (910) 835-5084
abrady@visitfayettevillenc.com

www.VisitFayettevilleNC.com