

DistiNCTly Fayetteville

# Traveler Sentiment Longitudinal Study

Prepared for DistiNCTly Fayetteville

Delivered December 2024



THE CLOSEST TO THE CUSTOMER WINS.



# Project Overview

**Purpose.** The purpose of DistINtly Fayetteville's Traveler Sentiment Longitudinal Study is to track regional travelers' attitudes and behaviors, measure relevant market capture rates and to provide an ongoing demographic and behavioral profile of Fayetteville/Cumberland County's own visitors.

**Target Audience.** This research was conducted among a general population cell of consumers who live within 400 miles of Fayetteville, NC. Panel respondents were screened to ensure that all are adult decision makers who travel for leisure.

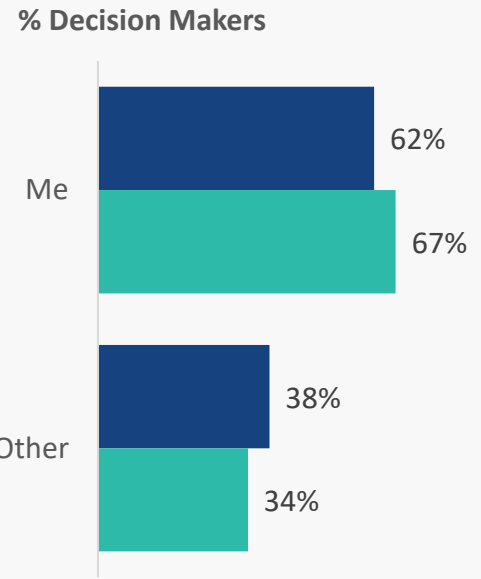
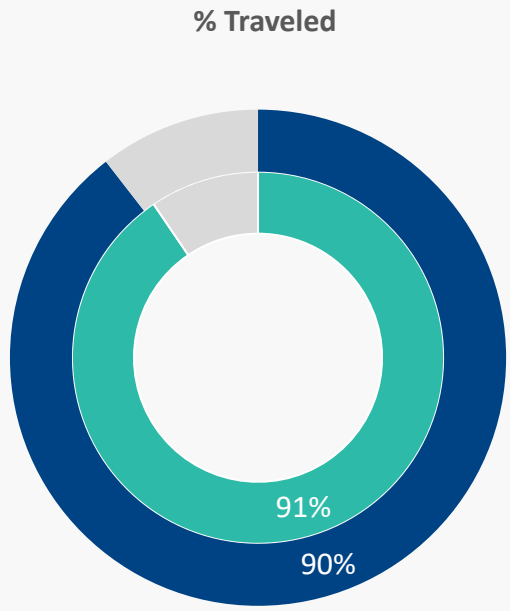
**Sample.** A total of 200 responses (per wave) are collected from this general population panel every two months throughout FY 2025 which will result in a total sample of 1,200. This size of sample will provide for a maximum margin of error of +/-2.8% at a 95% confidence interval.

# Key Takeaways

Wave 3 reveals a strong intent to travel and a positive economic outlook among regional travelers. While spending patterns have shifted, the desire to explore new destinations and engage in attractions remains robust. This data provides valuable insights for strategic planning and marketing efforts to attract and retain visitors to Fayetteville/Cumberland County.

- **Travel Behavior:** There is a notable increase in travelers visiting attractions (+14%) and browsing tourism websites (+4%). And more travelers have been traveling without children (+17%) and visiting new destinations (+8%) in recent months.
- **Visitor Spending:** Travelers are covering larger distances but spending similar amounts on tourism as last year, with increased spending on lodging (+13%) and slightly less on meals, entertainment, shopping, and attractions.
- **Trust in Information Sources:** Trust in state government, official tourism bureau websites, and attraction marketing messages has increased over comparable levels last year.
- **Intent to Travel & Economic Outlook:** Intent to travel among regional travelers has increased to 91%, up by 2% from last year. The Net Economic Outlook has improved by 13 points, indicating a positive economic sentiment.
- **Traveler Profile:** More travelers are traveling without children, and the average age of adult travelers has increased by almost two years. And the primary purpose of trips: Fewer travelers are visiting for specific events or business trips, with a shift towards leisure travel.

# Slightly fewer regional residents have traveled for leisure this year and more travel decisions have been made together than independently.



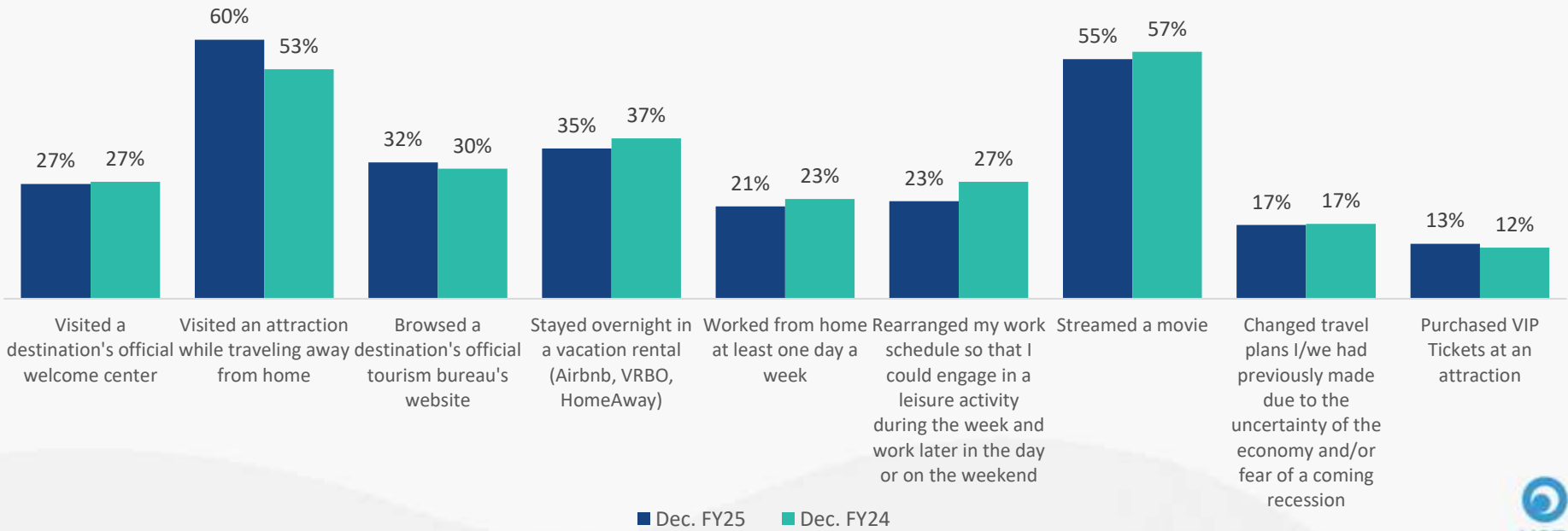
■ Dec. FY25 ■ Dec. FY24

Have you traveled for leisure more than 50+ miles from home this year?



**Significantly more travelers are visiting an attraction away from home (+14%), browsing official tourism bureau websites (+4%) and purchasing VIP tickets while at attractions (+3%). However, fewer are working from home (-9%) or rearranging their work schedules for weekday leisure activities (-15%).**

**Activity Engagement Over Past 12 Months**  
*Select All That Apply*



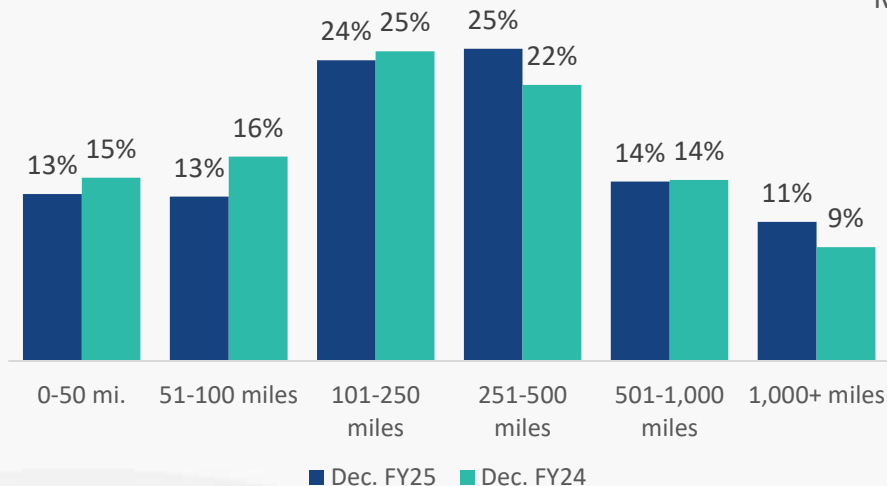
Which of the follow activities, if any, have you engaged in while traveling over the past 12 months? Please select all that apply.



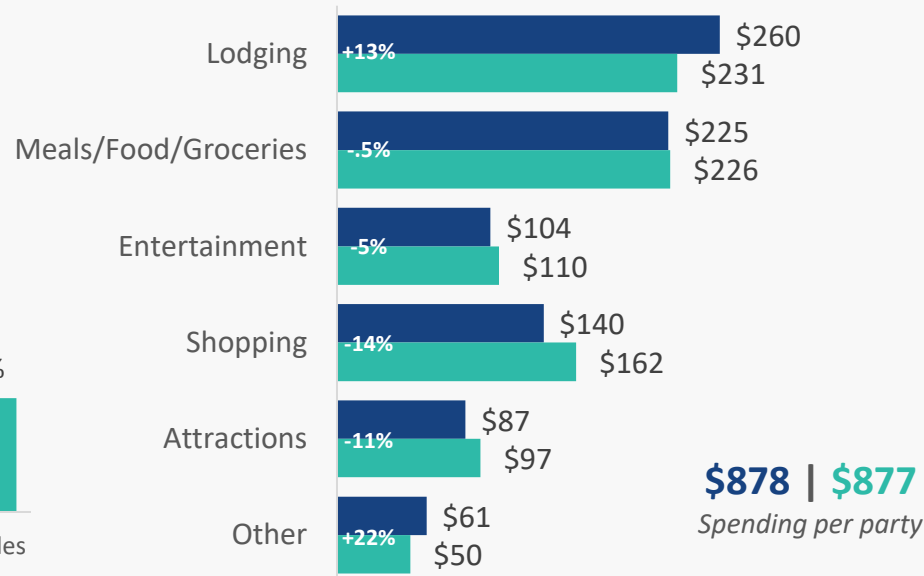
Those who traveled this past year report traveling larger distances but spending approximately the same amount of money as last year. Travelers this year have spent more on lodging and less on meals, entertainment, shopping and attractions.

Miles Traveled (One-Way)

513 miles | 425 miles



Visitor Spending

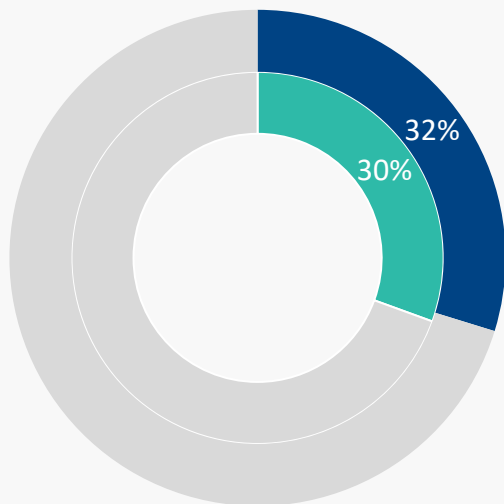


Approximately how far (in miles) is this destination from your home?

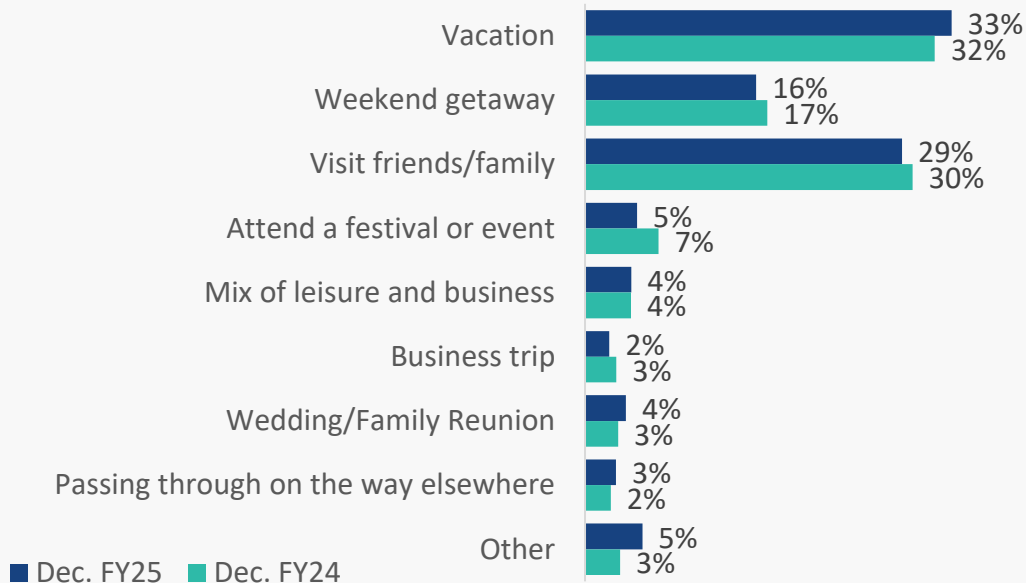
Please estimate your travel party's total spending for each of the categories listed below and enter the amounts in whole dollars using the boxes provided.

Almost two out of three travelers indicated that they had visited a particular destination before; however, +8% are visiting brand new destinations this year. In addition, fewer travelers had been visiting for a specific event (-30%) or been on a business trip (-22%) this year.

First-Time Visitors

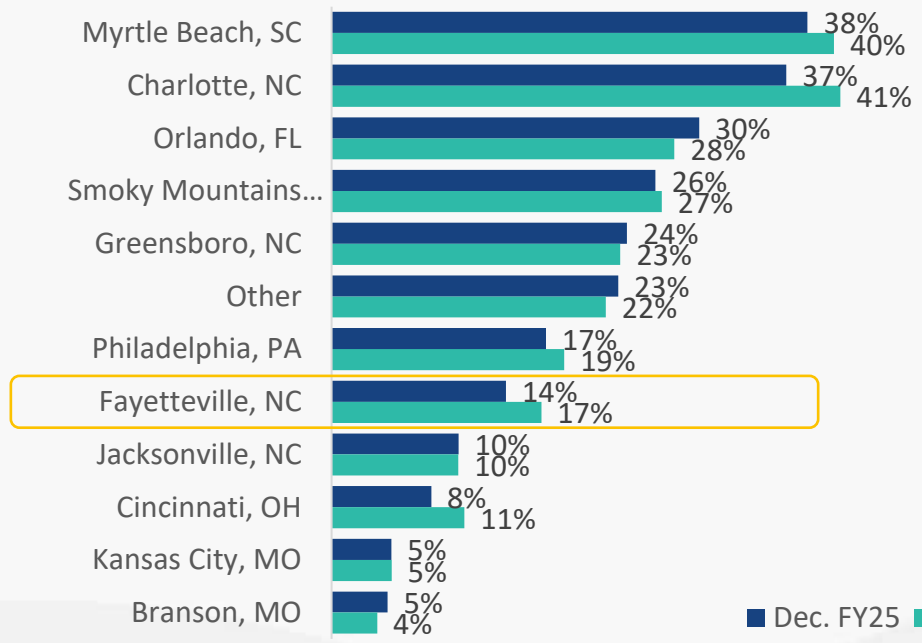


Primary Purpose of Trip



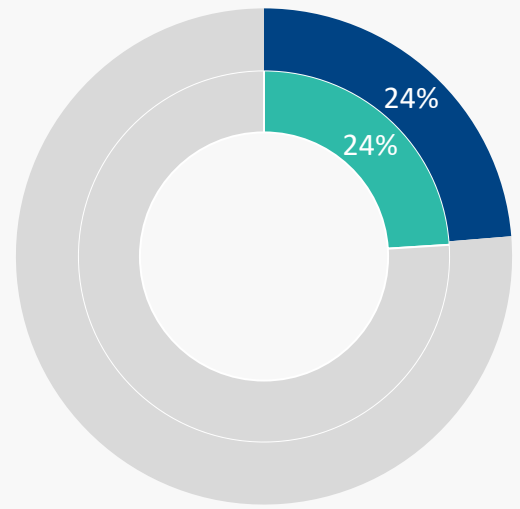
# Intent to visit Fayetteville remained on par with last year. Yet fewer indicated they had recently visited Fayetteville (-17%) or Cincinnati (-25%) at this time last year.

### Destinations Visited in Past 3 Years



### Intent to Visit Fayetteville in Next 12 Months

*% Probably/Definitely Will*



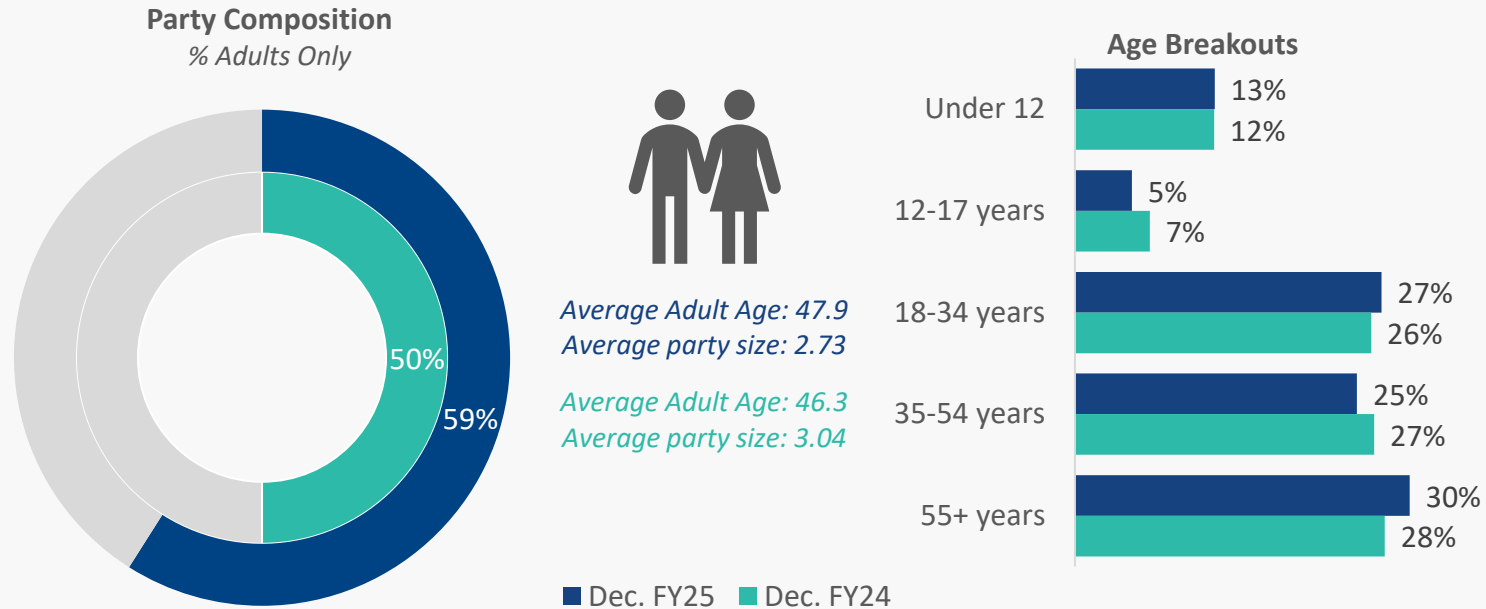
■ Dec. FY25 ■ Dec. FY24

Which of the following destinations have you visited in the past 3 years? Please select all that apply. Using the scale provided, please indicate your intent to visit each of the following destinations in the next 12 months. 5-pt. scale



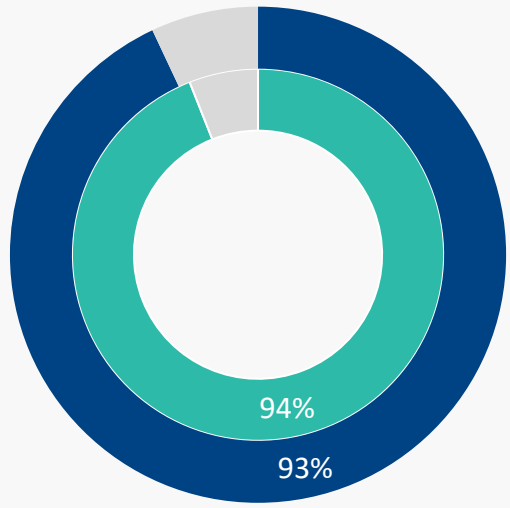


Notably more people have been traveling without children in 2024 than they were this time last year (+17%). On average, adult travelers are almost 2 years older than in 2023; the adult segments 18-34 and 55+ posted increases (+4% and 8%, respectively).

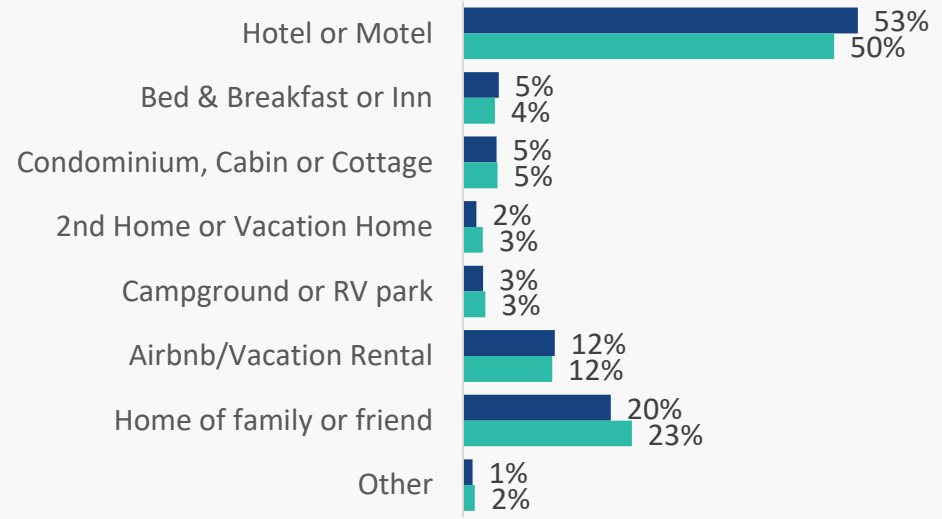


Although there was a slight decline, most travelers spent the night in the area on their last trip. Hotels remain the most popular choice of accommodation (+6%), followed by homes of family/friends and Airbnb properties.

Spent the Night



Accommodations



■ Dec. FY25 ■ Dec. FY24

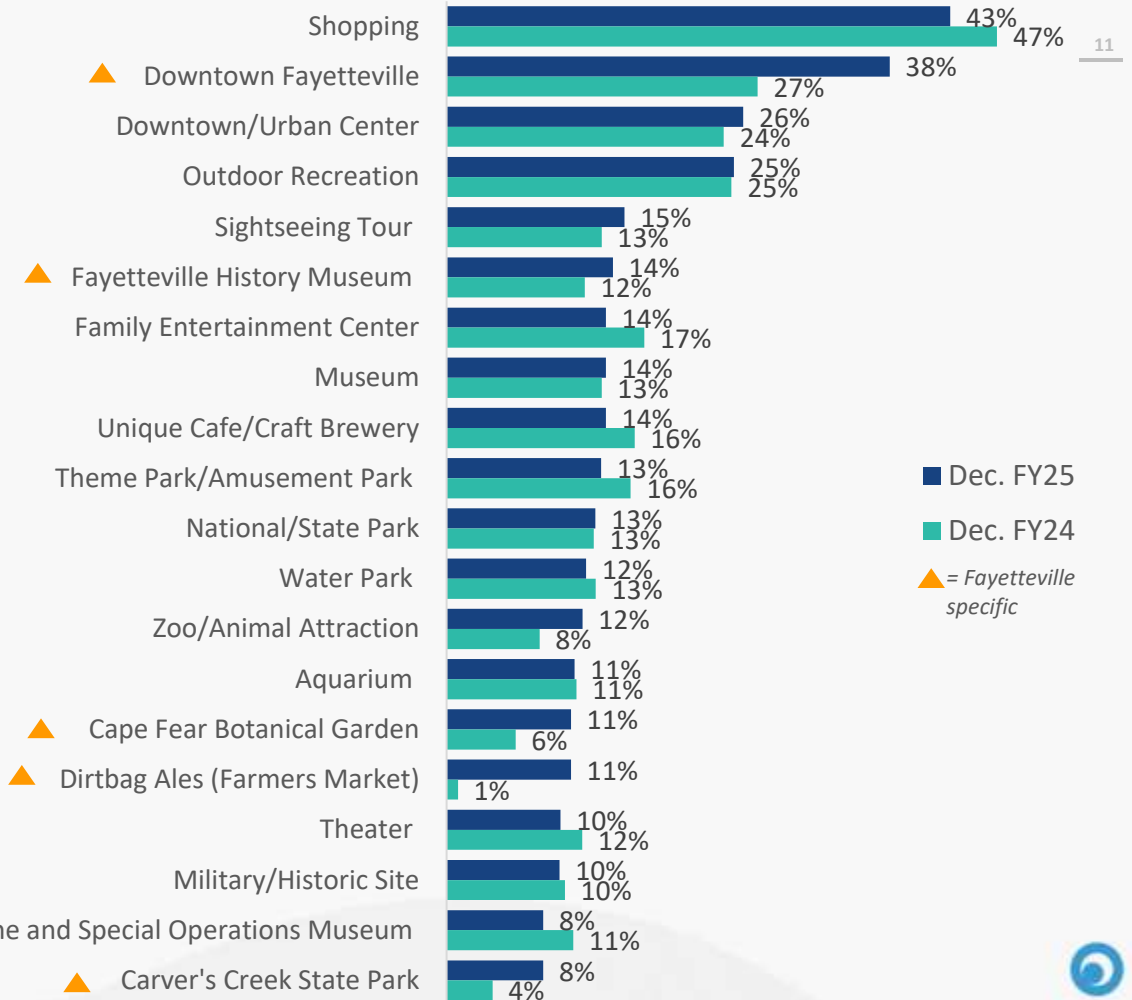
How many nights (if any) did you spend in this destination on your most recent trip?  
Which of the following best describes the type of accommodations you used on this trip?



# Attraction & Activity Participation (Top 20)

Regional travelers are most likely to participate in shopping and outdoor recreational activities during their trips, as well as visit local downtown areas or urban centers.

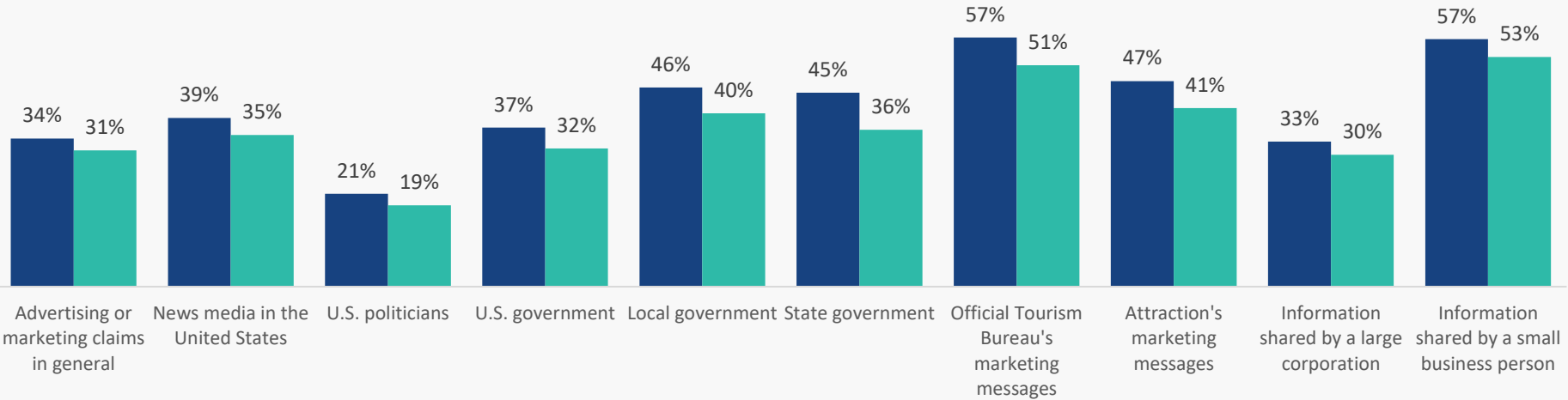
Fayetteville visitors specifically are most likely to venture downtown and visitation to most of the area's specific attractions increased—Fayetteville History Museum, Cape Fear Botanical, Dirtbag Ales, Carver's Creek State Park and Downtown Fayetteville being the most notable. Please keep in mind, YTD sample sizes from Wave 3 remain comparatively small relative to future results.



Which of the following attractions or activities did you visit/attend in on this same trip? Please select all that apply.

Interestingly, trust in a variety of different sources has increased among travelers this year, especially trust of State Government (+9 pts), Official Tourism Bureau Websites (+6 pts) and Attraction Marketing Messages (+6 pts).

Activity Engagement Over Past 12 Months  
*% Somewhat/Completely Trust*



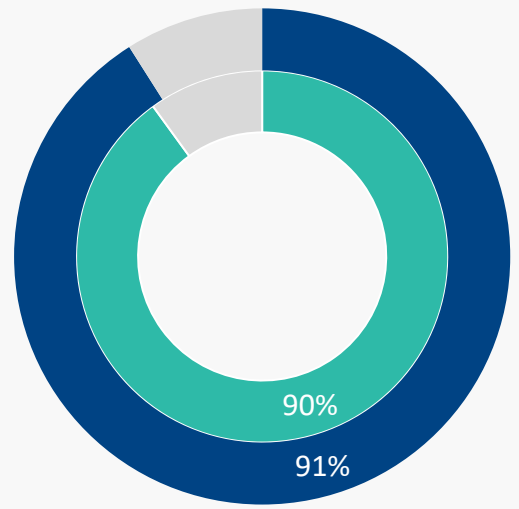
■ Dec. FY25    ■ Dec. FY24

Please indicate to what extent you trust each of the following information sources: 5-Point Scale.

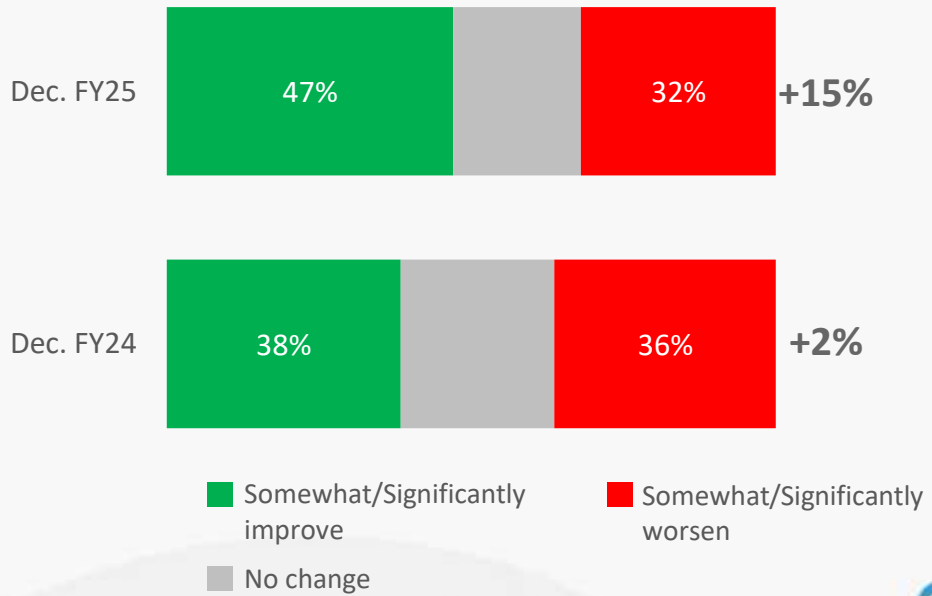


**Intent to travel remains strong and is up compared to at this time last year. Likewise, economic outlook is more positive than this time last year. Those who believe the economy will improve increased while those fearing a decline decreased, resulting in a net improvement of 13 points over last year.**

**Intent to Travel in Next 12 Months**  
*% Probably/Definitely Will*



**Economic Outlook – Next 6 Months**



Please indicate how likely you are to take an overnight trip and/or trip of 50 miles or more in the next 12 months. 5-pt. scale  
Which of the following best describes how you believe the U.S. economy will perform over the next 6 months? 5-pt. scale



# Research developed for DistiNCTly Fayetteville.

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](mailto:mbemarkt@h2rmarketresearch.com)

THE CLOSEST TO THE CUSTOMER WINS.

