

CUMBERLAND COUNTY, NC  
**FAYETTEVILLE**  
— AREA —  
CONVENTION AND VISITORS BUREAU

# 2022 Stakeholder Research

FACVB

January 2022





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Fayetteville Area Convention & Visitors Bureau (FACVB)

## Project Overview

**Purpose.** The goal of the 2022 Stakeholder Research was to explore how local stakeholders perceive Fayetteville/Cumberland County as a travel destination, how they feel about key local organizations and the value propositions they provide, and how the community feels it can or should position itself to optimize travel perceptions in the future.

**Target Audience.** This research was conducted among local organizations' internal email lists of local business contacts and consumers. This included lists from the Greater Fayetteville Chamber of Commerce, Fayetteville Area Convention & Visitors Bureau (FACVB), Cool Spring Downtown District, Fayetteville Public Works Commission and others. The survey reached 76,085 business and consumer households across the region and via social media was available to everyone in the area.

**Sample.** In total, 1,433 area stakeholders were interviewed in an effort that resulted in 722 completed responses that provide for a maximum margin of error of +/-3.6% at a 95% confidence interval.

# Preface

- The purpose of this study was to solicit input from community stakeholders to inform the nature of questions that are being asked of regional travelers. The idea was to objectively begin the process with the businesspeople and consumers who know Fayetteville/Cumberland County best and to leverage those insights as we seek to better understand how regional travelers perceive the area's tourism brand, what they look like and what aspects of the community are most compelling in attracting their attention.
- Additionally, this study explored the level of community awareness of three key organizations (Greater Fayetteville Chamber of Commerce, Cool Spring Downtown District and FACVB); and perhaps more importantly, explored the relative importance of their respective programs, actions and opportunities in order to quantify the strengths and opportunities that exist for each of these entities.
- This study builds upon the insightful findings delivered in the North Star Study in 2018. But, in contrast to the purpose of that study, this research initiative is intended to help shape Fayetteville/Cumberland County's image among regional and national travelers. The hope is to use the preponderance of information gathered from both efforts to help optimize community assets and the Fayetteville/Cumberland County tourism brand.

# Topline Takeaways

- Given the purpose of the study, this survey inherently covered a great deal of real estate that took the average respondent nearly 17 minutes to fully complete. The fact that more than 6,500 area stakeholders engaged with the survey and that 1,433 submitted responses is a testament to the commitment area stakeholders feel for the Fayetteville/Cumberland County area and the level of support they are willing to provide. Their time and commitment will be used to help make the area a more compelling regional tourist destination and guide the efforts of local organizations.
- Some of the key takeaways' community stakeholders offered include:
  - **Fayetteville/Cumberland County's Defining Characteristics.** Area stakeholders feel Fayetteville/Cumberland County most excels in the areas of Military/Government, Downtown District, Accommodations & Food, Arts & Entertainment and Travel & Tourism. That is, stakeholders feel the community serves as a gracious host that excels at welcoming and entertaining residents and tourists alike.
  - **Key Points of Interest (POI).** As a gracious and welcoming host for regional travelers, it is no surprise that many of the region's most compelling points of interest (POI) or attractions include Military/Historic Sites, the Airborne & Special Operations Museum (ASOM), Cape Fear Botanical Garden, Spectator Sports and Museums among other things. Thus, stakeholders feel that visitors to the community would benefit most by exploring the history of the area, embracing its beauty and enjoying spectator sports. The intent in the next step will be to determine which POI tourists themselves say they are most interested in visiting.
  - **Fayetteville/Cumberland County's Brand Perception as a Tourist Destination.** Stakeholders were most likely to describe the area with words and phrases such as: A place with a sense of history and military presence that inspires a culture of readiness & action, a city with lots of diversity, a great place to meet interesting people and being a destination, whose diverse strengths may be unknown to many, but the stage is set for a welcome surprise.



# FACVB Takeaways

- **Awareness and Program Importance.** Over three-quarters (82%) of area business stakeholders and 89% of the FACVB's member/partners indicate familiarity with FACVB as an organization. Additionally, nearly three-quarters (73%) of the business community and 87% of member/partners are aware of at least one major program or initiative the FACVB is responsible for.
- **Most Important Programs & Initiatives.** More importantly, however, is which programs or initiatives are considered most important. The business community indicates that the three most important initiatives the FACVB is responsible for includes the community's Visitor Profile, Marketing Communications and Publicity. Member/partners agree all three of these programs are important, but they rank them in a slightly different order of importance: Marketing Communications, Visitor Profile and Stewardship of the Community's Tourism Brand. It is also worth mentioning that the average FACVB program/initiative earns a somewhat/very important rating that averages 86% among the business community and 89% among member/partners, meaning that all programs are considered comparatively important to the community's tourism efforts.
- **Satisfaction with FACVB Programs & Initiatives.** The FACVB programs/initiatives that the business community are most satisfied with include Marketing Communications, Publicity and the Visitor Profile. Thus, the business community is most satisfied with the very same things they consider most important. Not surprisingly, these three initiatives also serve as the FACVB's greatest strengths as far as the general business community goes. Member/partners are also the most satisfied with the FACVB's marketing efforts, but they are also quite satisfied with the organization's Social Media Presence and stewardship of the community's tourism brand which also, by the way, accounts for their perception of the FACVB's biggest strengths as an organization.
- **FACVB's Unique Selling Proposition (USP).** By exploring the relationship between each target audience's level of satisfaction with their corresponding degree of organizational engagement, it is possible to identify the FACVB's "Unique Selling Proposition" or USP. This is often different from what are considered the organization's strengths because rather than comparing importance and satisfaction we are examining what most drives the engagement with the organization. Based upon this algorithm, the general business community sees the FACVB's USP as being Marketing Communications. However, member/partners feel that for them the FACVB's real USP is Generating/Share Sales Leads with Area Tourism Partners.



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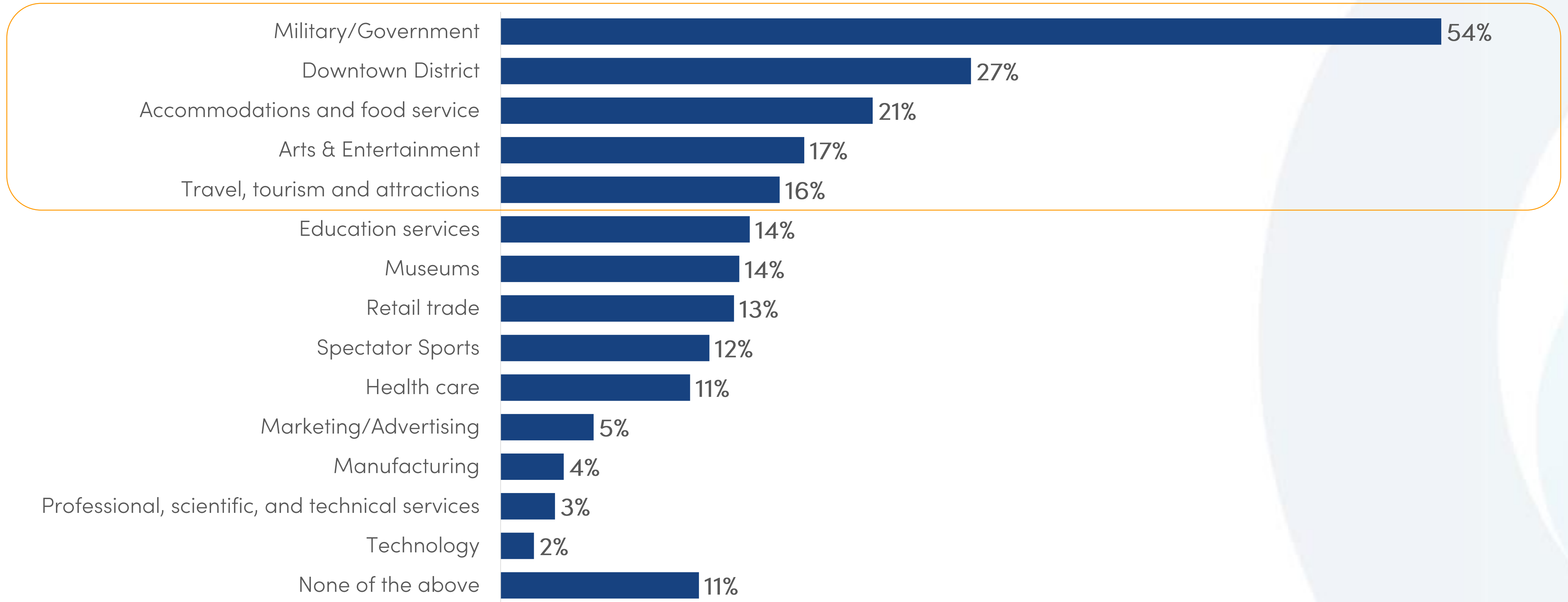
# Community Insights





# More than half of area stakeholders overall agree that Fayetteville/Cumberland County excels at Military/Government activities, Downtown District and Accommodations/Food Service.

## Areas in which the Fayetteville/Cumberland County Area Excels



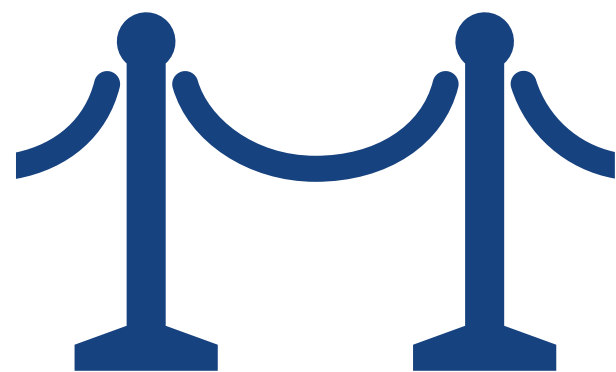
# The most popular activities/attractions in the area are considered the Military/Historic Sites, Airborne & Special Operations Museum (ASOM) and Cape Fear Botanical Garden.

## 5 Most Popular Area Activities/Attractions



45%

Military/Historic Sites



43%

ASOM



34%

Cape Fear Botanical Garden



29%

Spectator Sports



27%

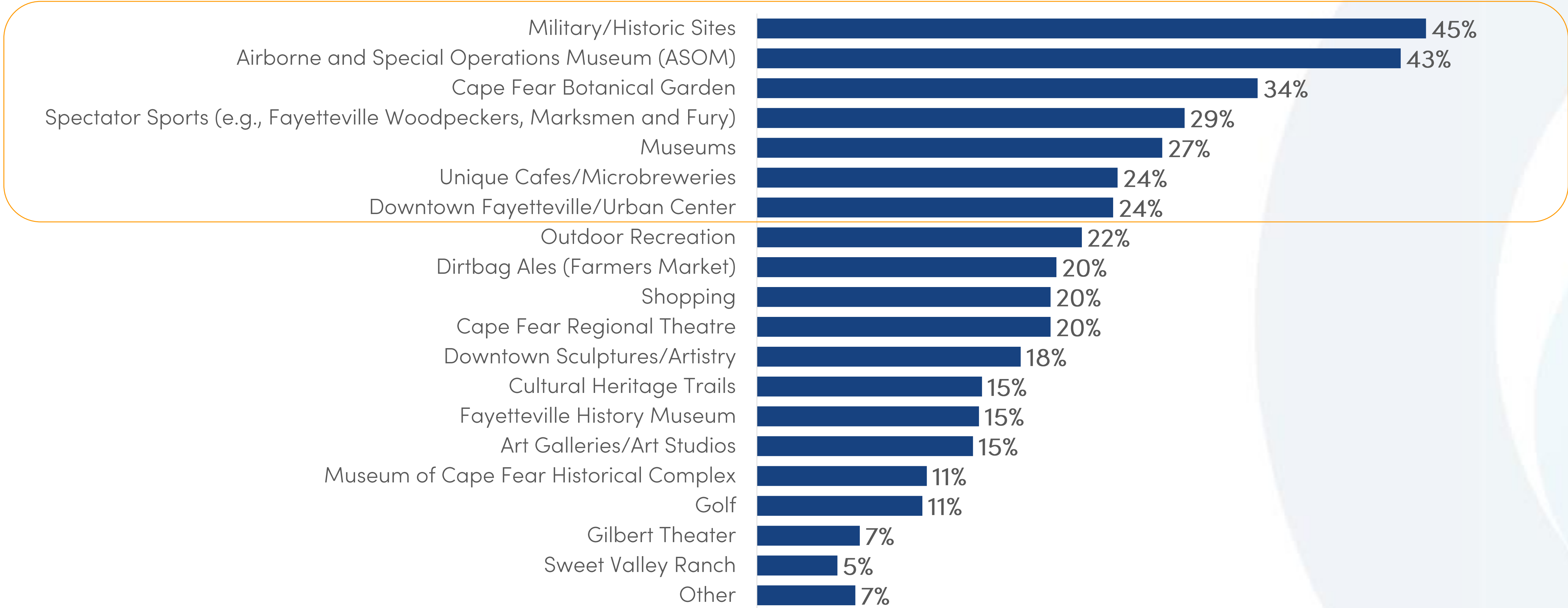
Museums

Q13: Which of the following attractions, activities or points of interest do you believe are of the greatest interest to travelers visiting the Fayetteville NC/Cumberland County? Please select all that apply.



# Military/Historic sites, ASOM and the Cape Fear Botanical Garden are the activities that stakeholders feel are most interesting to potential tourists.

Attractions, Activities, POI of Greatest Interest to Tourists





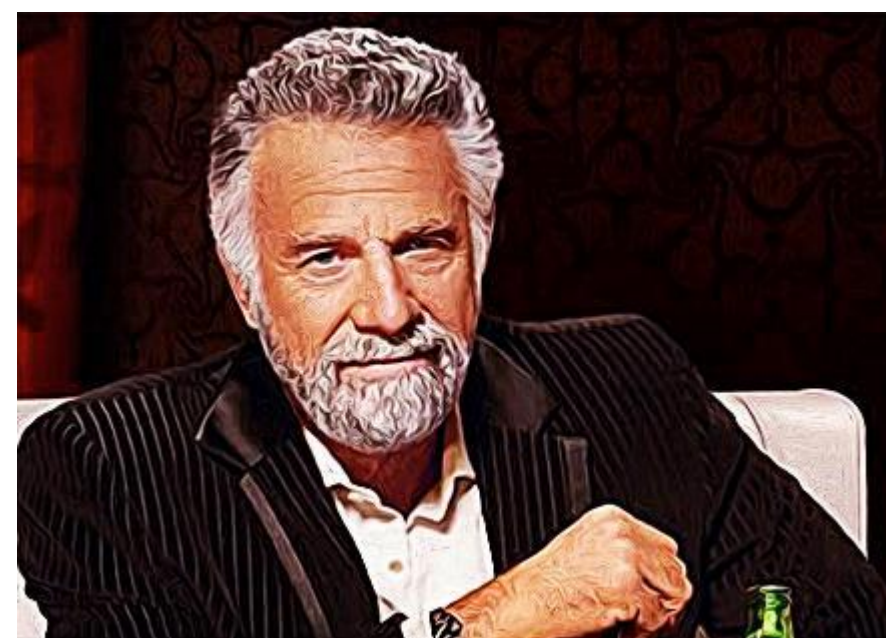
The words/phrases community stakeholders feel best describe the Fayetteville/Cumberland County community include a sense of history & military presence, lots of diversity, interesting people & diverse strengths that are a welcome surprise.



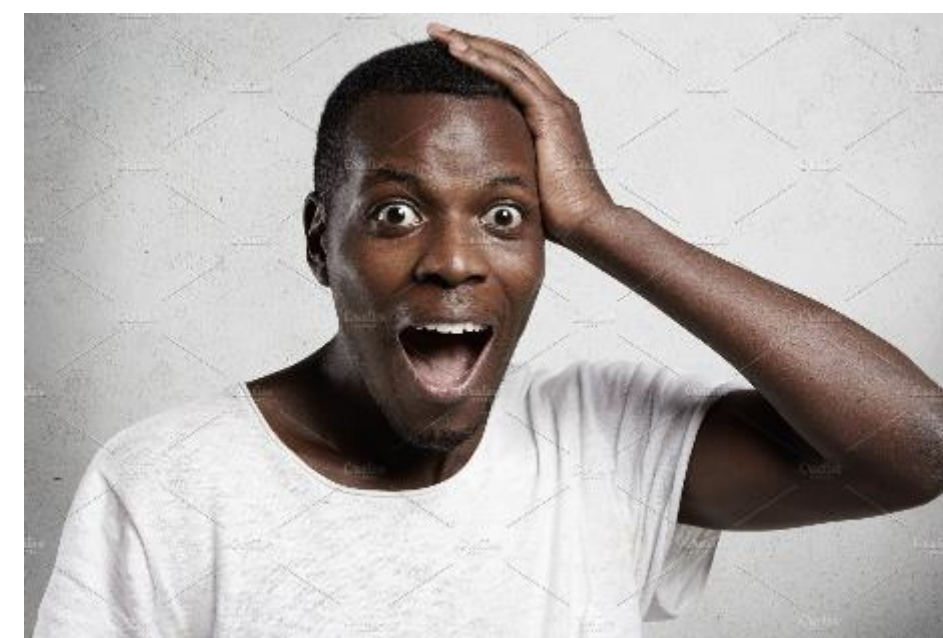
Place with a sense of history & military presence



City with lots of diversity



Great place to meet interesting people



Diverse strengths provide a welcome surprise

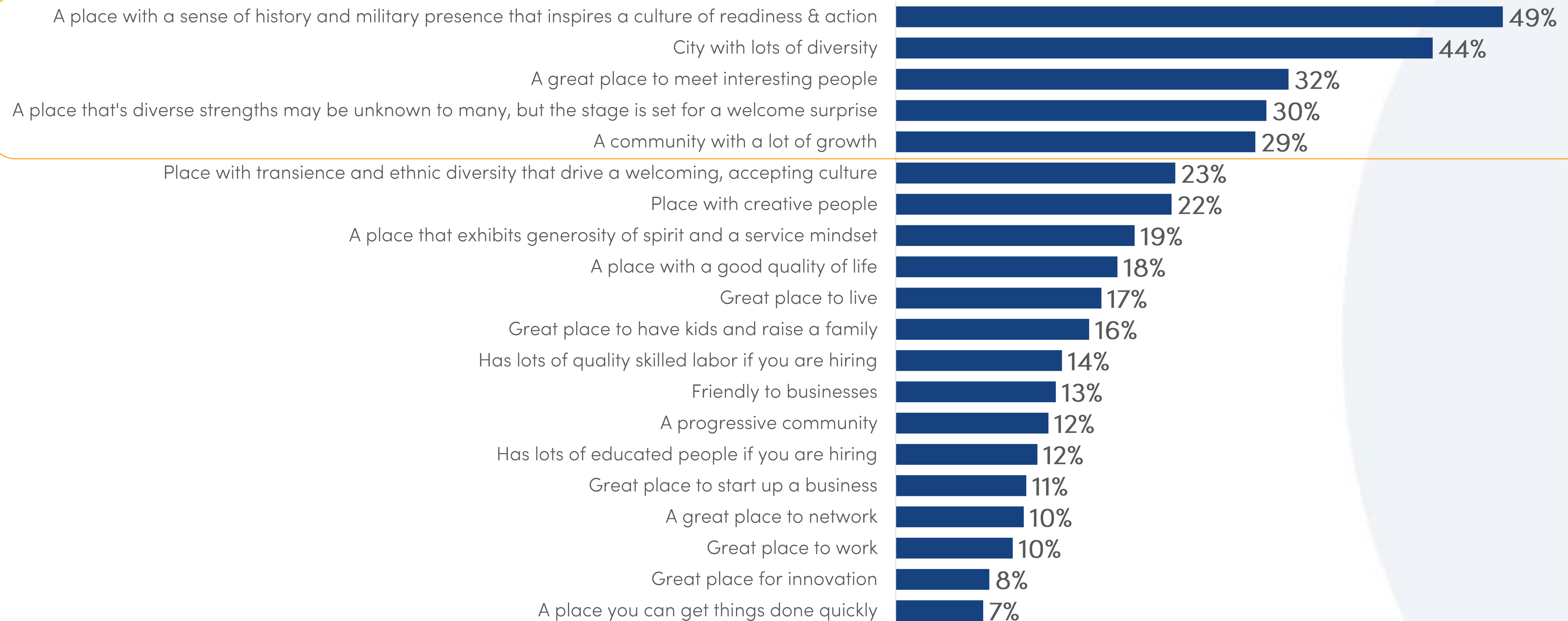


Community with lots of growth



# Area stakeholders are most likely to describe Fayetteville/Cumberland County as a place with a sense of history, military presence, diversity, and interesting people.

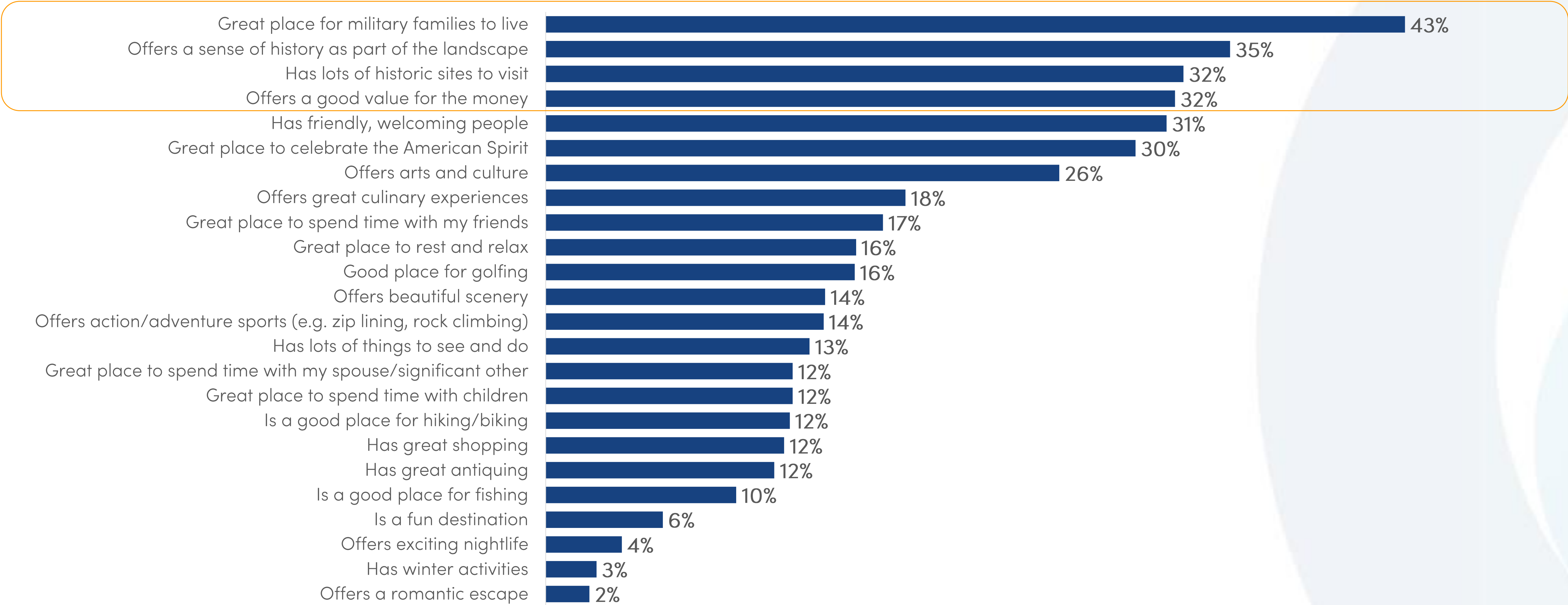
## Top Phrases to Describe the Area






From a brand perspective, stakeholders see the area as being a great place for military families, offering a sense of history and having great historic sites to visit.

Top Characteristics to Describe the Area



Q15: Next, we'd like you to evaluate Fayetteville on a number of other characteristics. Your responses should be based on your impressions, whether it be from personal experience as a visitor or a resident, or from what you've heard/read from friends, family and/or media.





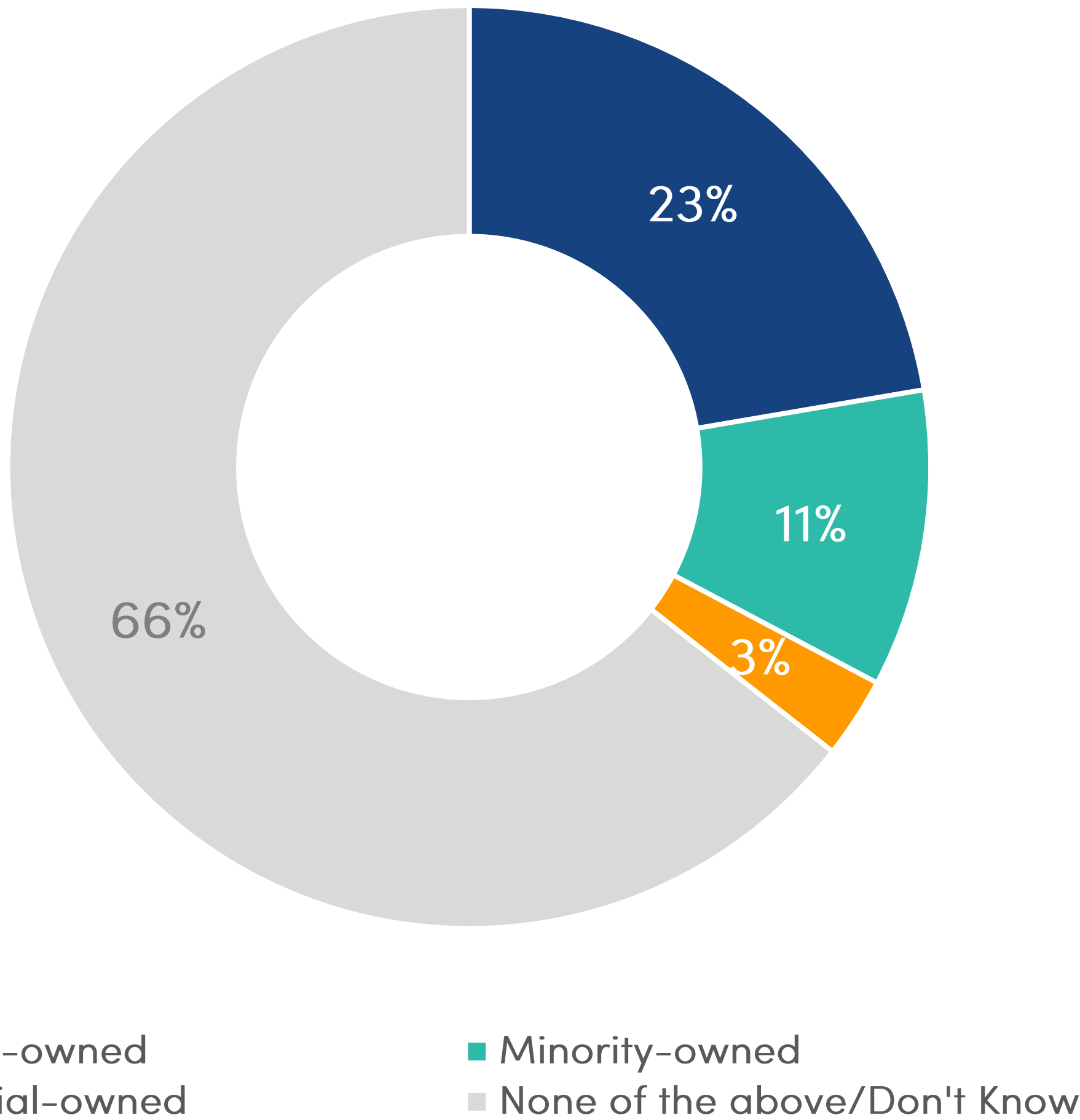
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# Business Landscape

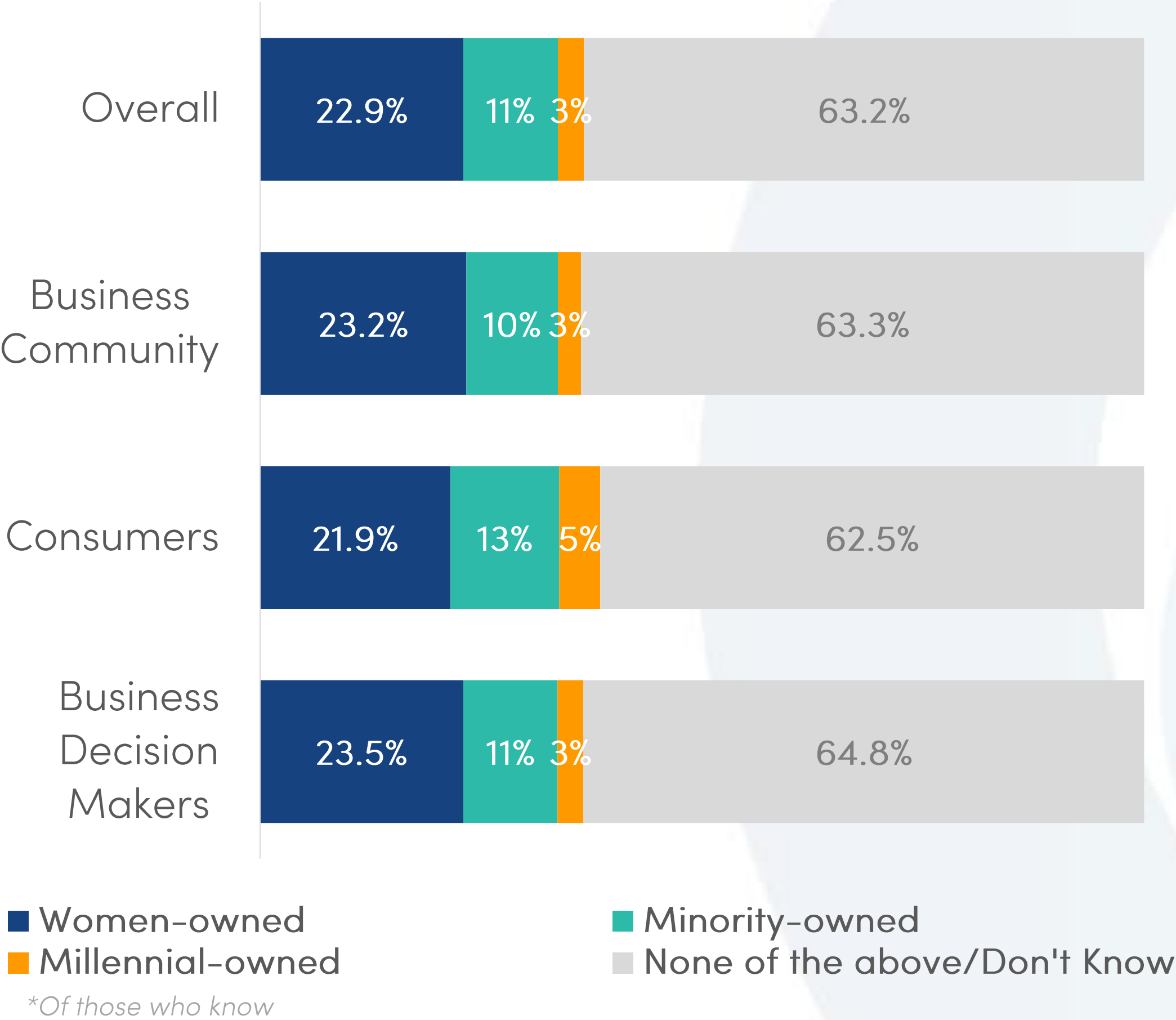


# According to area business decision-makers, one-third of area businesses are owned by women, minorities and/or millennials.

Area Company Structures



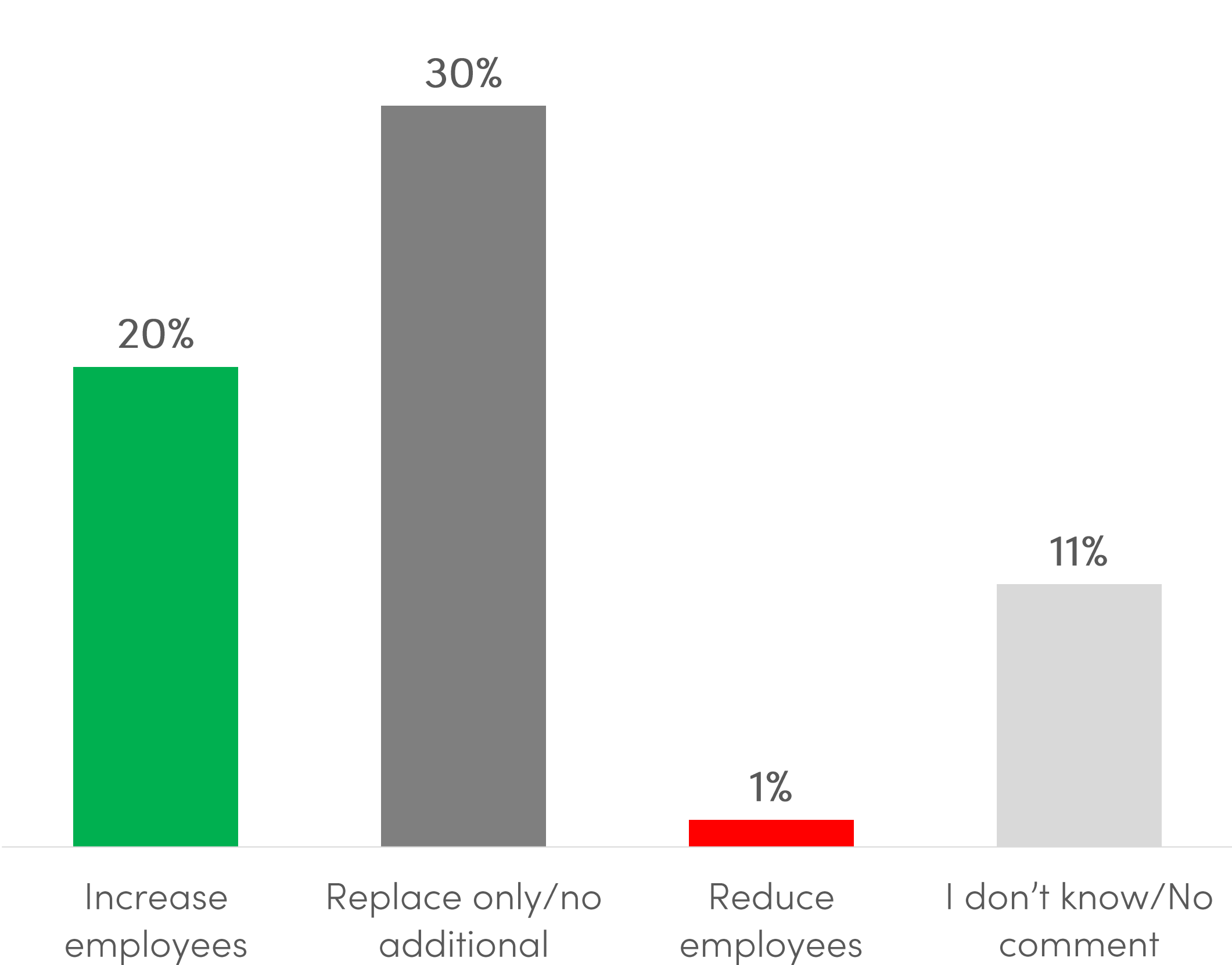
Area Company Structures by Niche\*



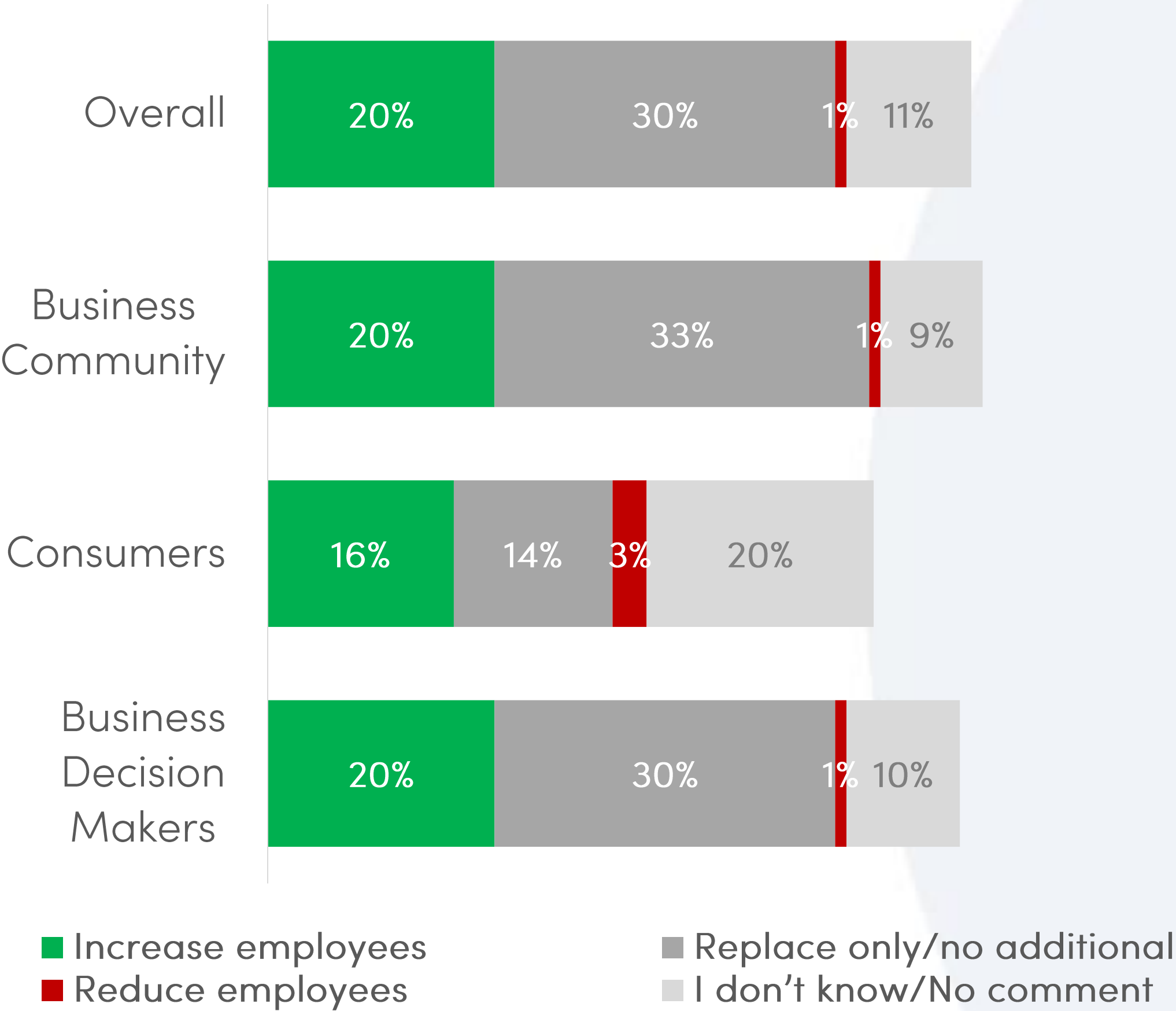


# One in five business decision-makers say they plan to increase their number of employees in 2022.

### Hiring Expectations for 2022



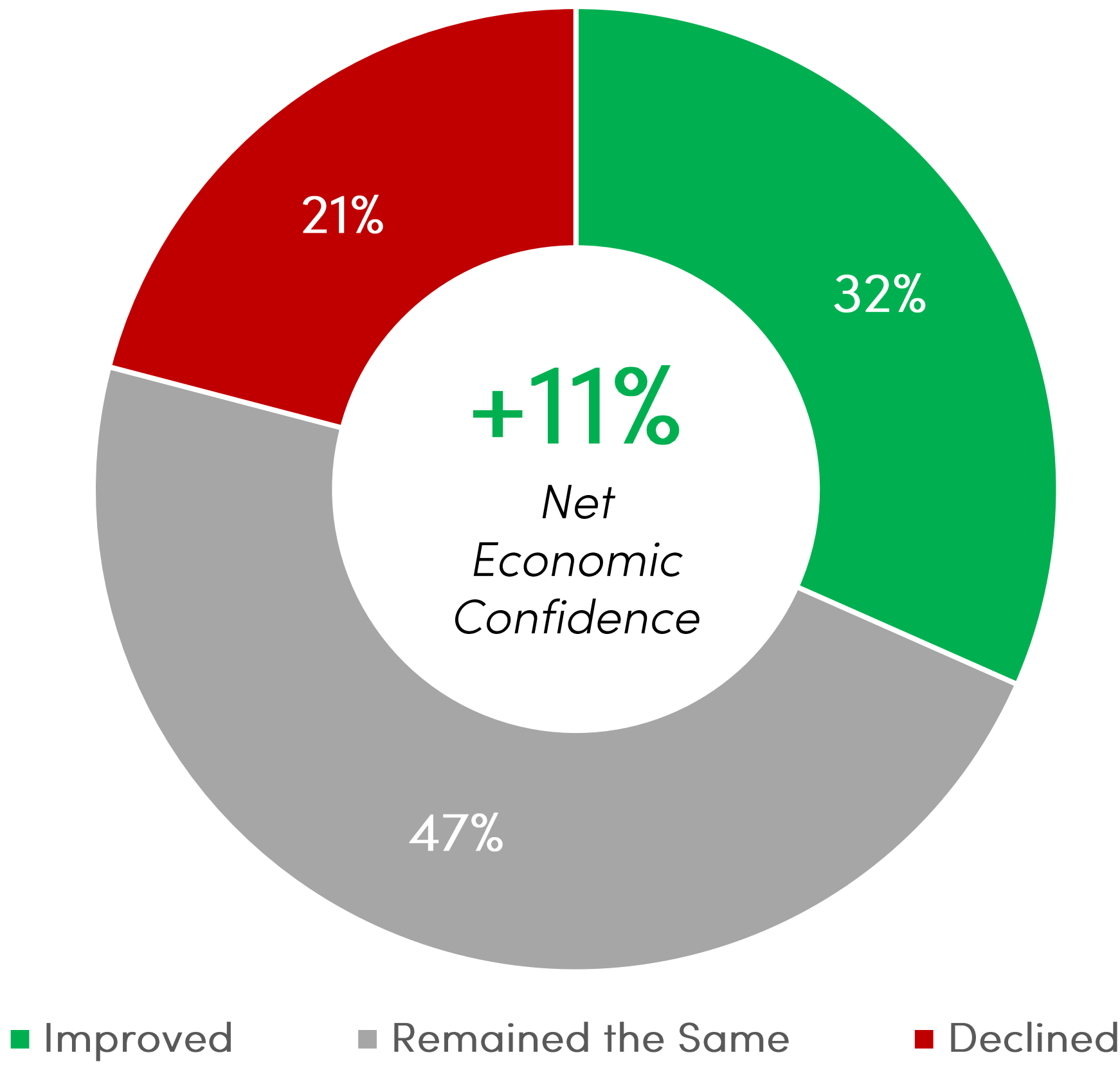
### Hiring Expectations by Niche



Q28: In 2022, or your next fiscal year of operation, do you plan to...? Please select all that apply.

# Area stakeholders are feeling more confident in the local economy this year as most (79%) expect things to remain the same or improve in 2022. Consumers reflect greater optimism than business leaders.

Confidence in the Local Economy Compared to One Year Ago



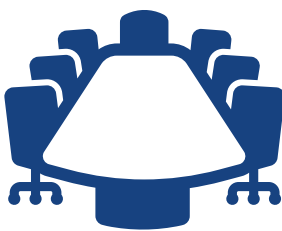

Economic Confidence by Niche



Q29: Compared to a year ago, would you say that your confidence in the local Fayetteville NC/Cumberland area economy has...?



The average Fayetteville/Cumberland County businessperson is around 50 years of age, works full-time and nearly half are in a management role. FACVB member/partners tend to be a bit older and more likely to be an owner, CEO or CMO.

			
	Overall	Business Community	Consumers
Average Age	51.1	48.8	56.9
18-34 years	13%	16%	6%
35-54 years	44%	48%	33%
55+ years	43%	36%	61%
Full-Time	59%	66%	41%
Owner	14%	15%	11%
CEO/CMO	6%	7%	4%
GM/Director/Sprvsr	27%	28%	27%
Employee/Other	52%	51%	58%
Women-Owned	23%	23%	22%
Minority-Owned	11%	10%	13%
Millennial-Owned	3%	3%	5%



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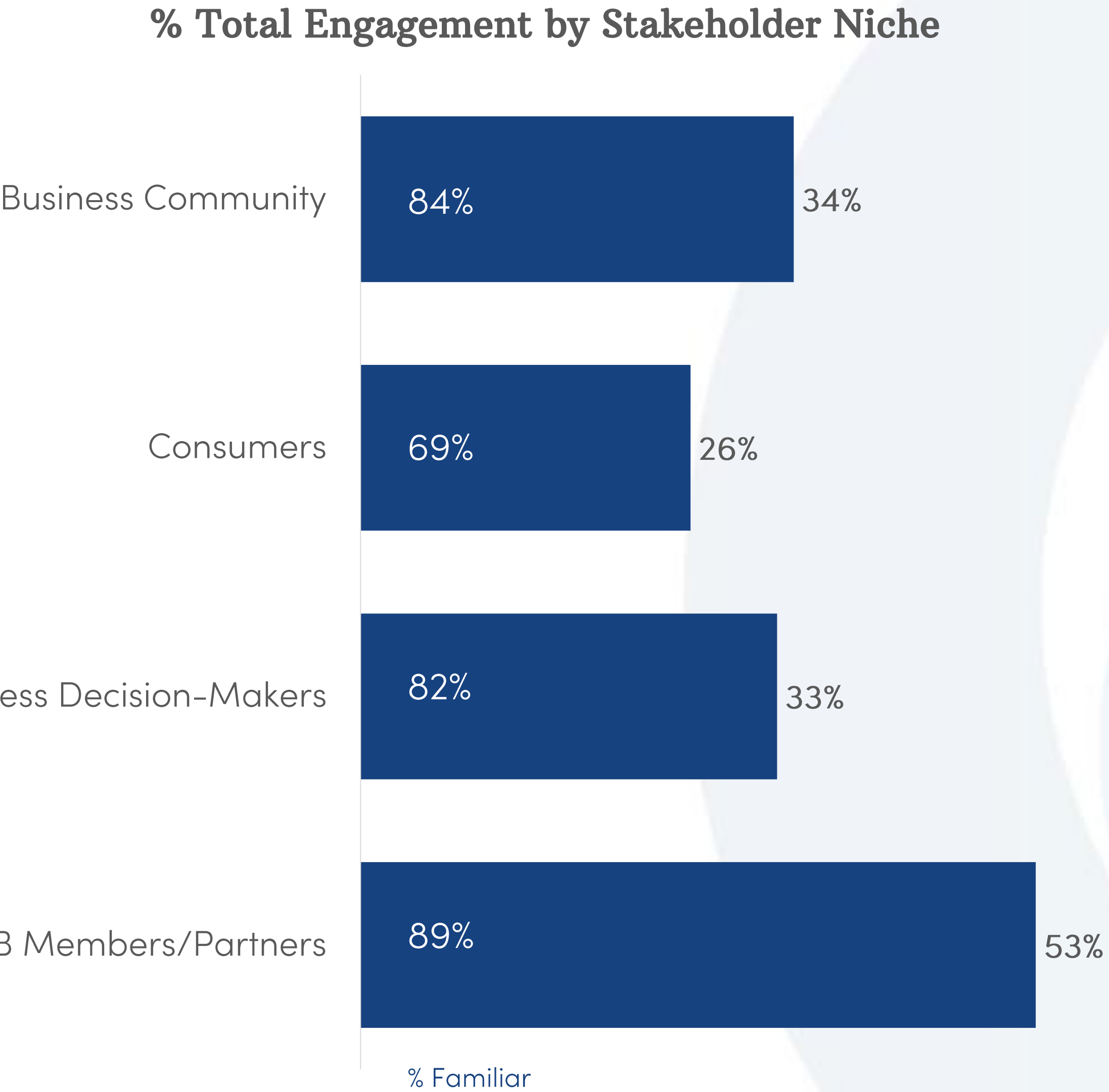
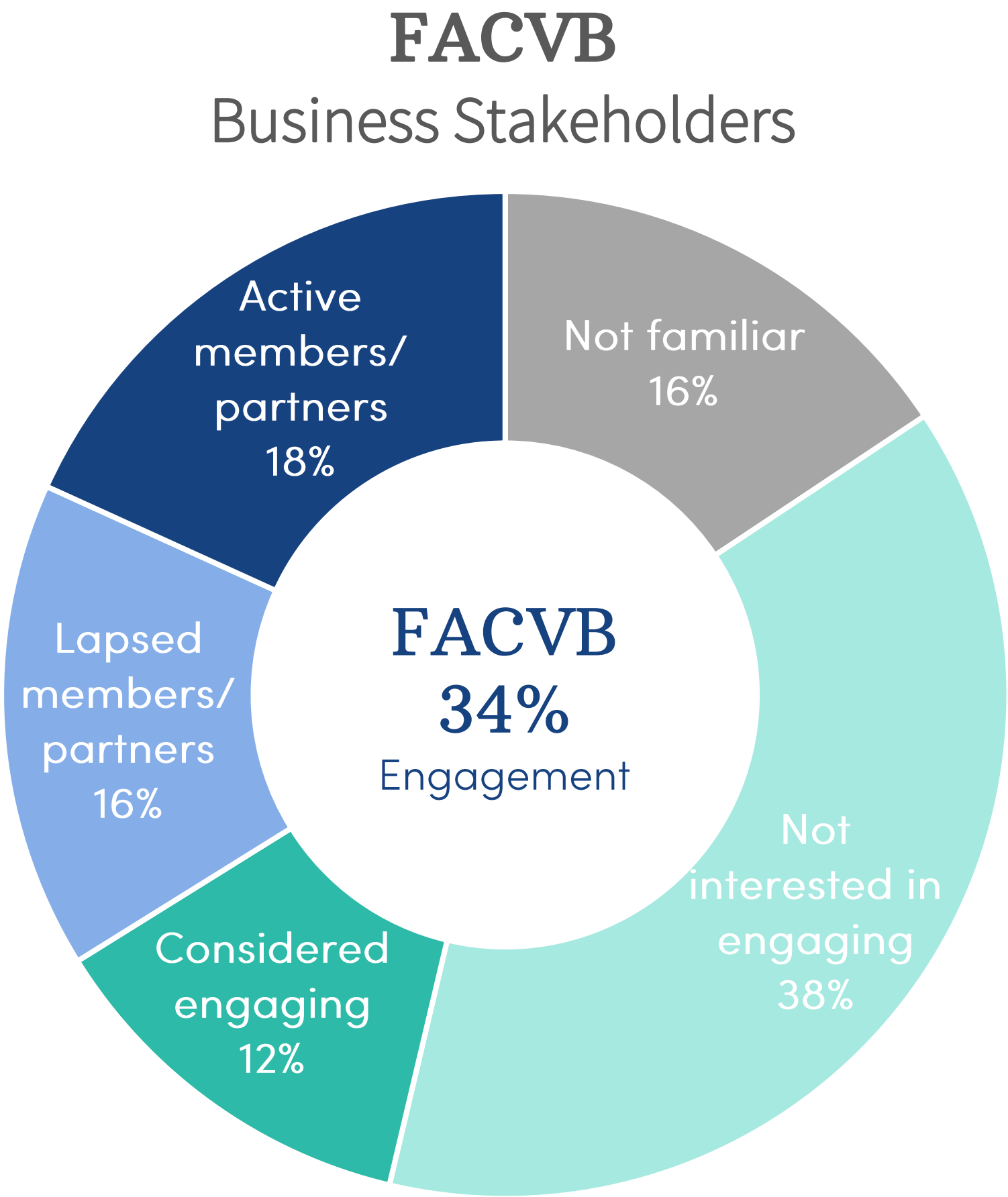
# Fayetteville Area Convention & Visitors Bureau

FAYETTEVILLE AREA CONVENTION & VISITORS BUREAU

VISITOR  
INFORMATION  
CENTER



# Nearly 85% of area businesspeople are familiar with the FACVB and 34% are, or have been engaged, with the organization.



Q8: Please indicate your businesses' status, if any, with each of the following organizations.

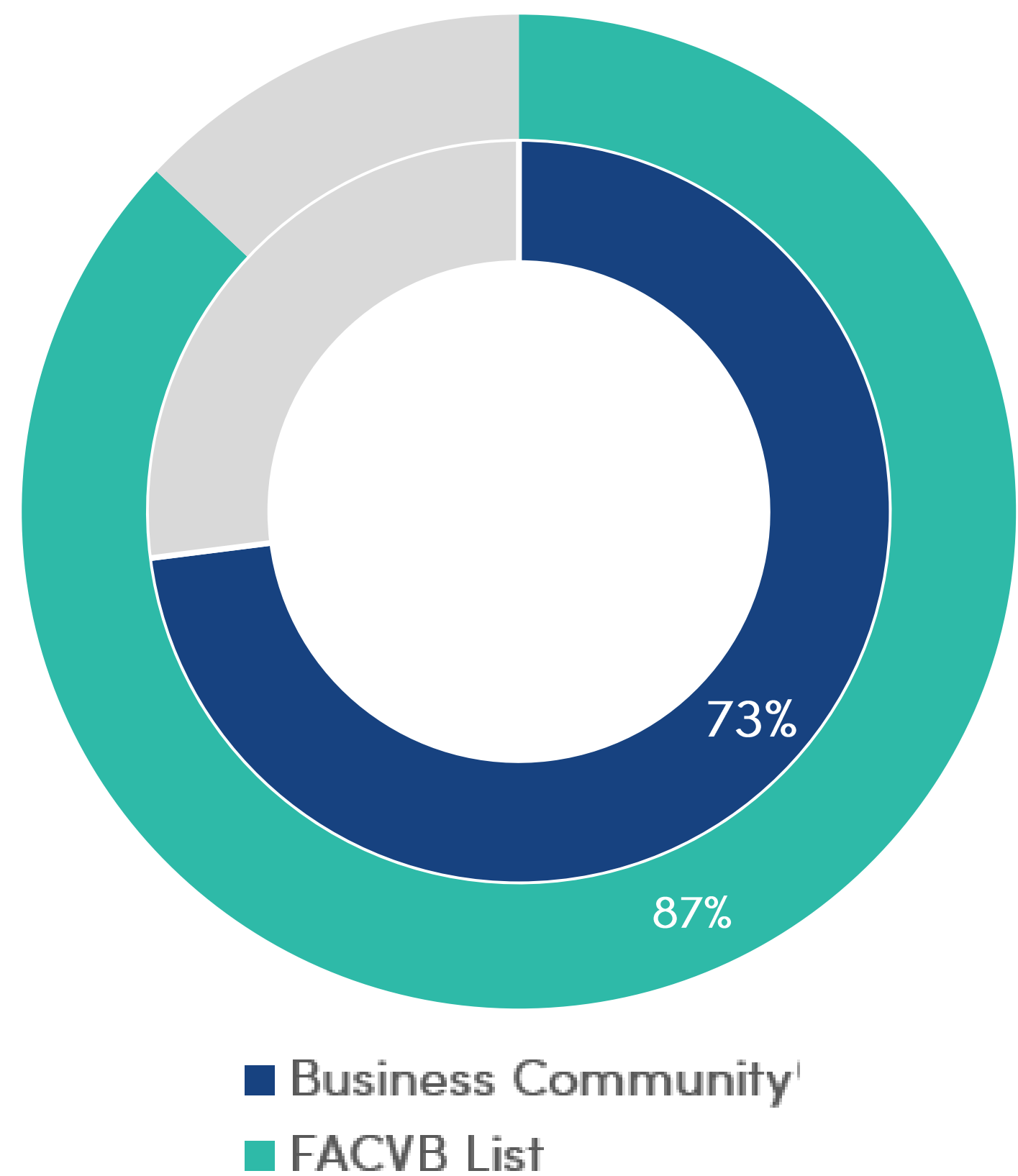




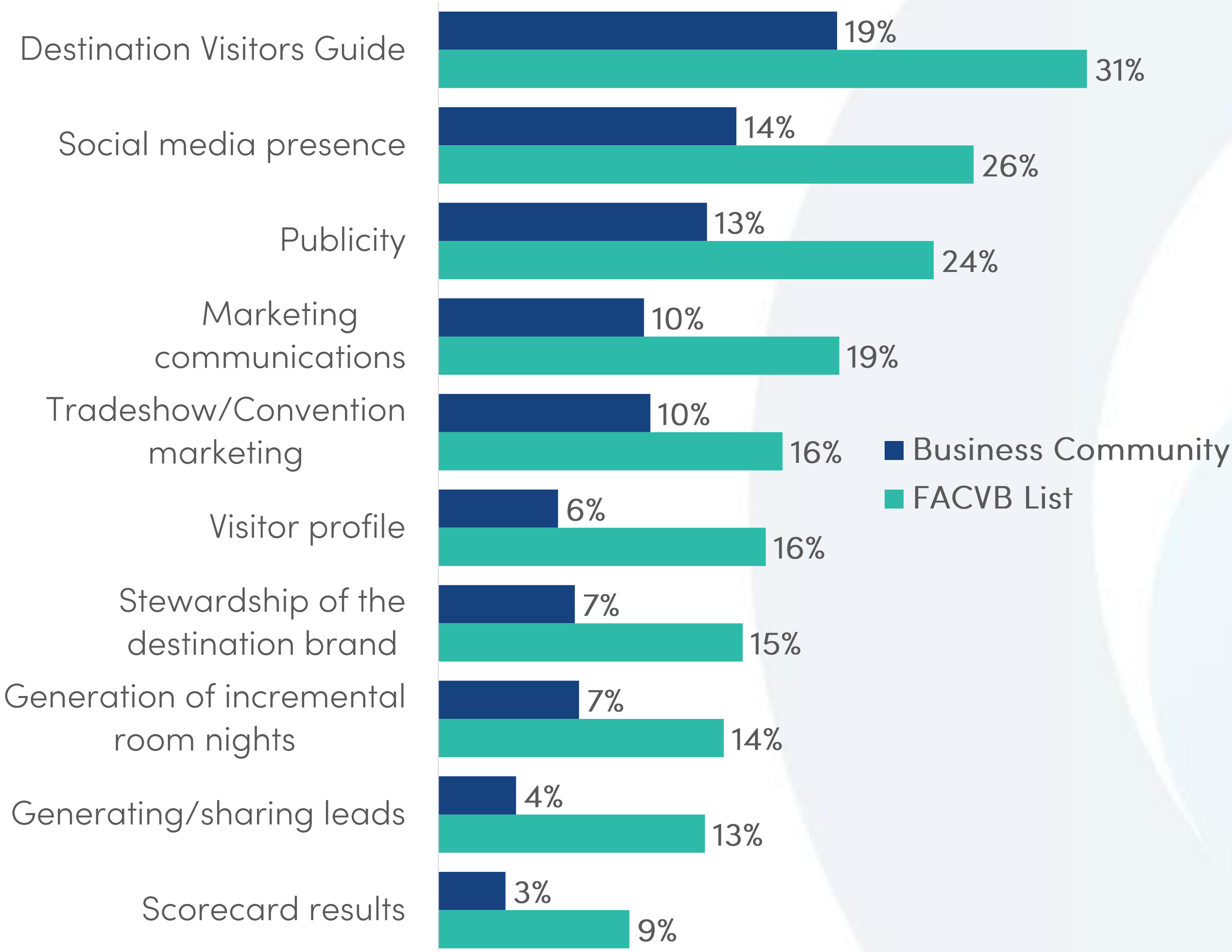
Both FACVB member/partners and the business community are most familiar with the Visitor Guide, Social Media, Publicity and Marketing Communications programs.

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Familiar with at Least One FACVB's Programs, Actions or Opportunities



Awareness of FACVB's Programs

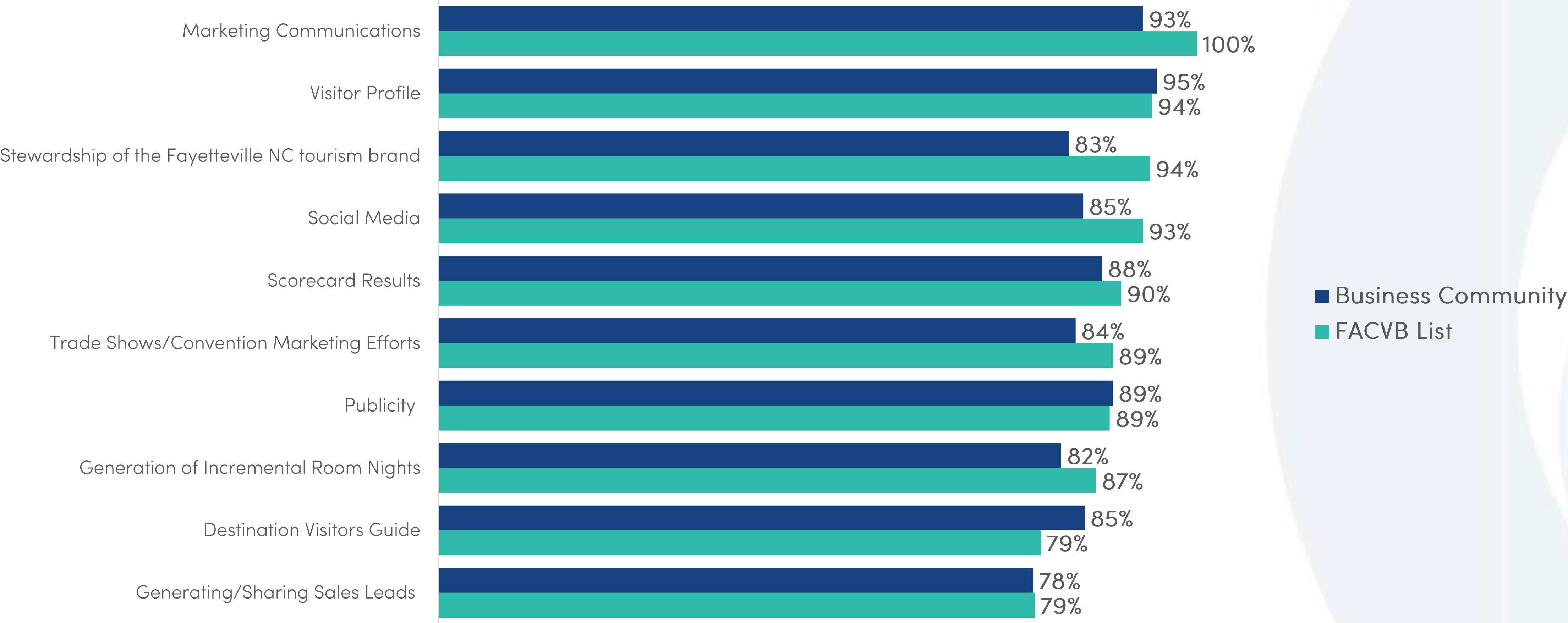


Q23: Which of the following programs, actions or opportunities provided by the Fayetteville Area Convention & Visitors Bureau are you familiar with?

RESPONDENT BASE: BUSINESS RESPONDENTS N=1,022; FACVB LIST RESPONDENTS | N=113

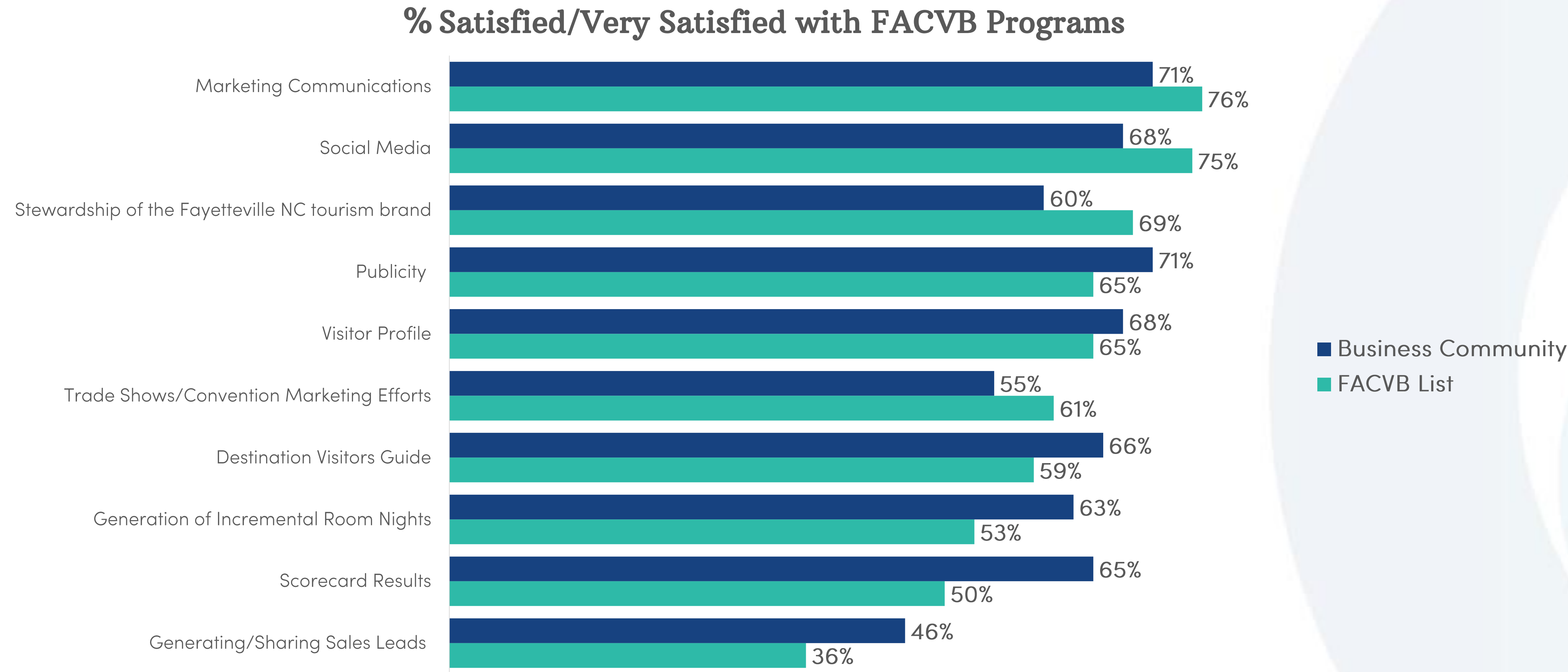
# FACVB member/partners feel the most important programs/actions are Marketing Communications, the Visitor Profile and Stewardship of the Community's Tourism Brand.

Importance of FACVB's Programs (% Somewhat/Very Important)





# The programs that FACVB member/partners indicate they are most satisfied with include the Visitor Profile, Social Media Presence and Destination Visitors Guide.



Q25: Please indicate how satisfied you have been with your experience as it relates to each of these programs, actions and opportunities provided by the Fayetteville Area Convention & Visitors Bureau.

RESPONDENT BASE: BUSINESS RESPONDENTS N=1,022; FACVB LIST RESPONDENTS | N=113

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.

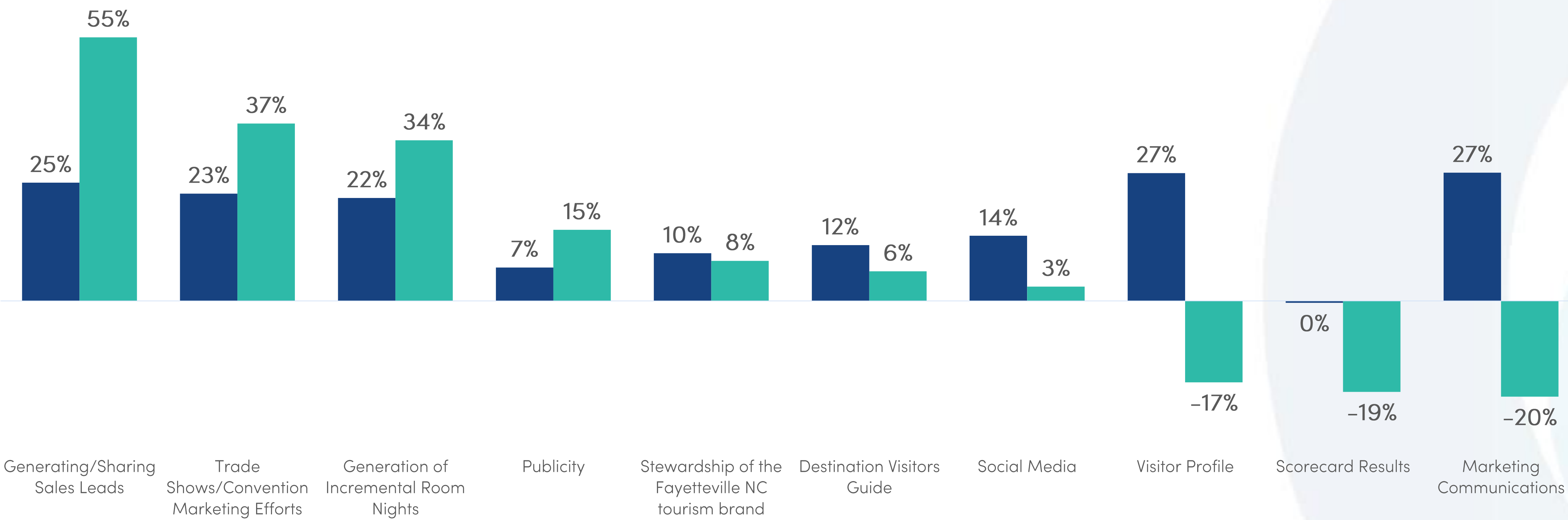


Q24: Please indicate how important these convention & visitor bureau programs, actions and opportunities are to you and/or your place of business. Q25: Please indicate how satisfied you have been with your experience as it relates to each of these programs, actions and opportunities provided by the Fayetteville Area Convention & Visitors Bureau.



# FACVB’s USP among constituents is its Generation of Sales Leads, Trade Show Marketing and Delivery of Incremental Room Nights.

% Correlation with Intent to Engage



Q25: Please indicate how satisfied you have been with your experience as it relates to each of these programs, actions and opportunities provided by the Fayetteville Area Convention & Visitors Bureau.

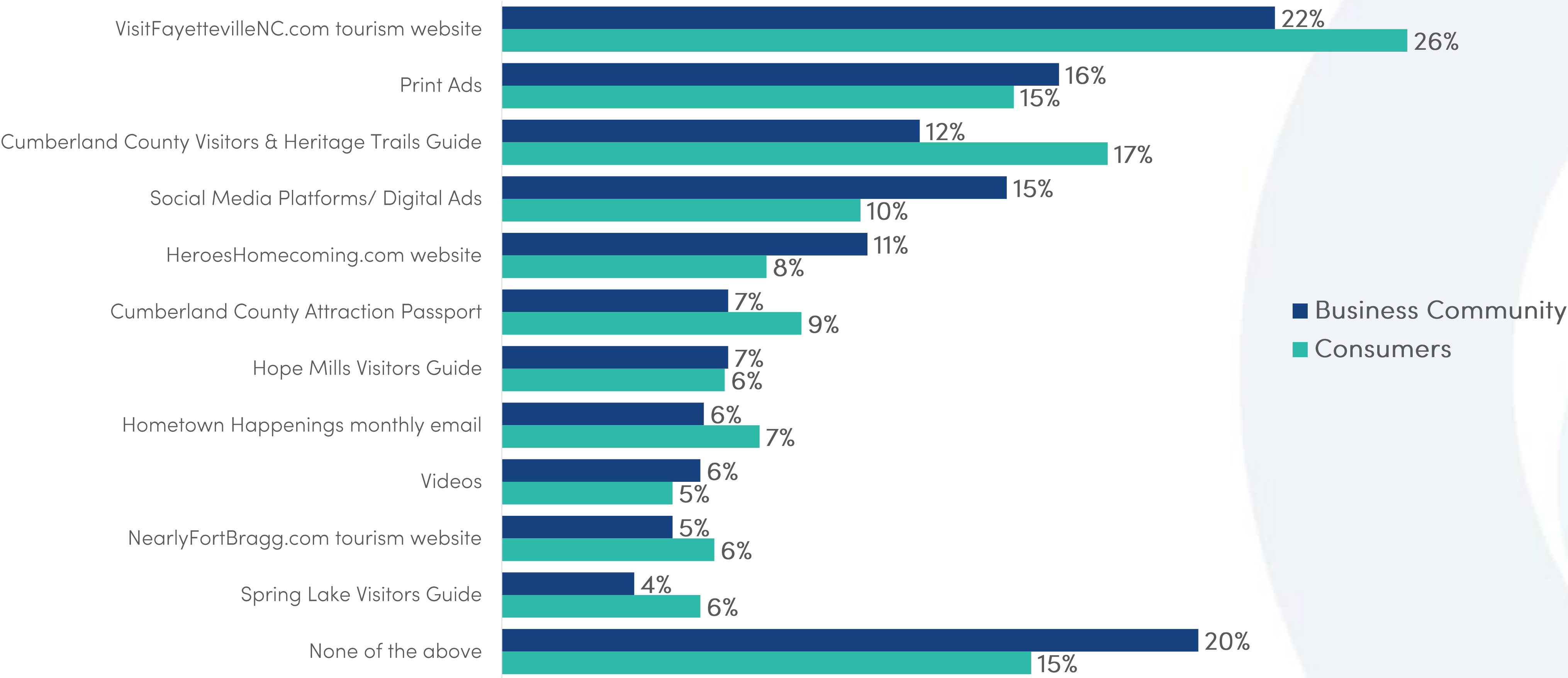
■ Business Community   ■ FACVB List

RESPONDENT BASE: BUSINESS RESPONDENTS N=1,022; FACVB LIST RESPONDENTS | N=113



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.

Awareness of FACVB Communication Materials

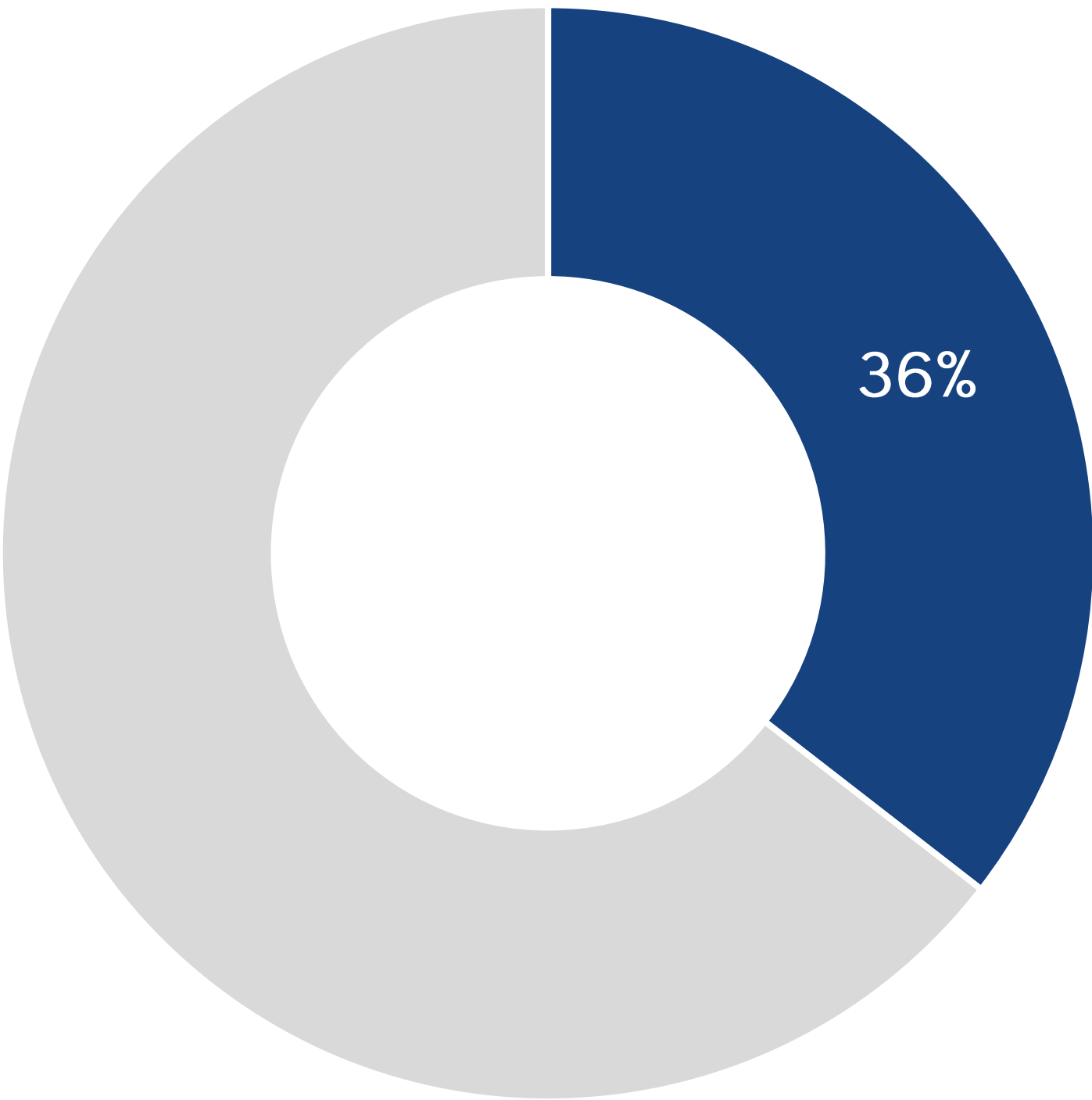


Q26: Which of the following Fayetteville Area Conventions & Visitors Bureau communication materials have you seen? Please select all that apply.

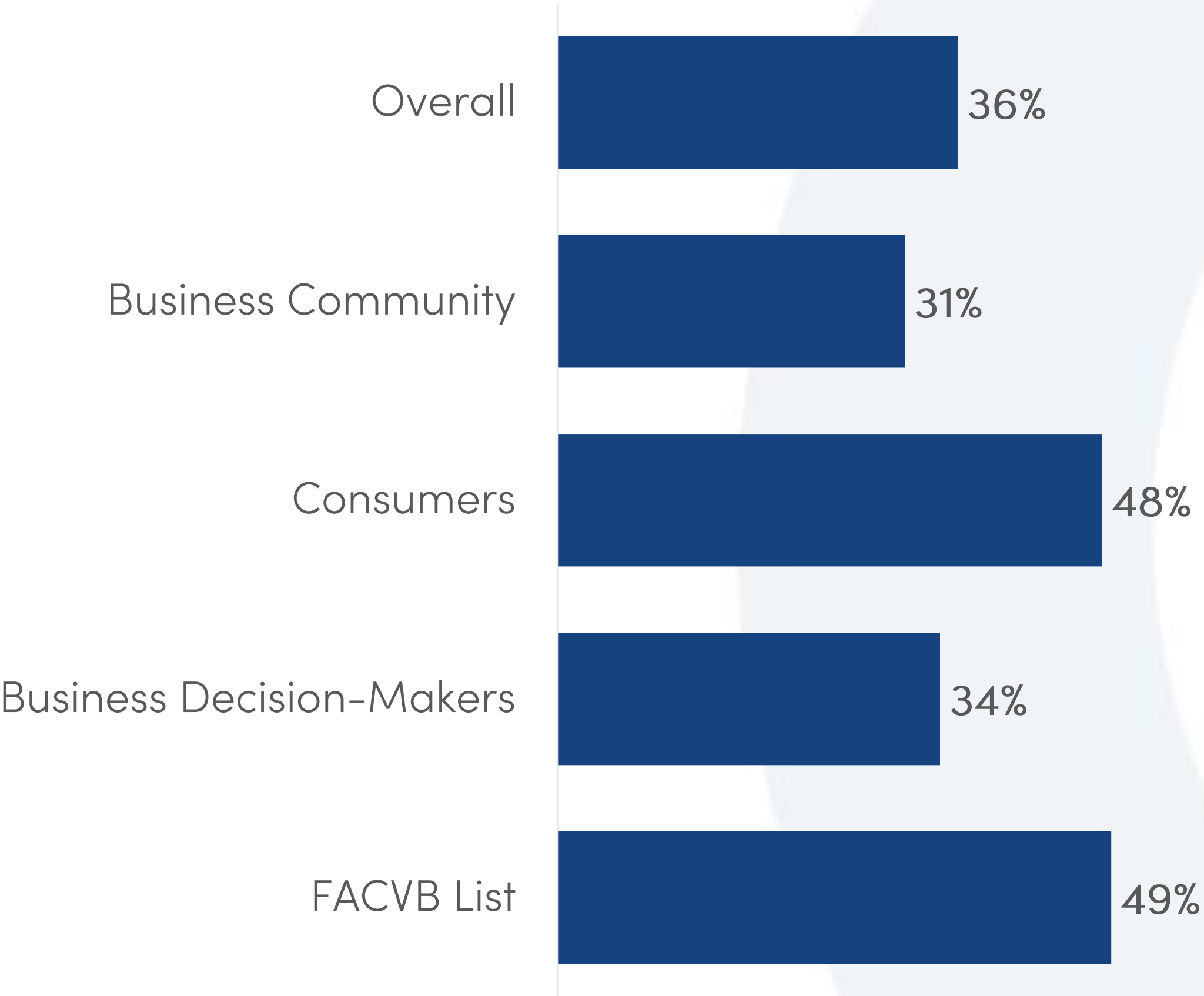


# More than one-third of area stakeholders believe the FACVB is doing a good/excellent job delivering on their brand promise.

FACVB has Done a Good/Excellent Job Delivering on Brand Promise



Delivering on Brand Promise by Niche



Q27: In your opinion, how well has the Fayetteville Area Convention & Visitors Bureau delivered upon its brand promise to, "Rekindle and Reawaken the American Spirit in Every Corner of the Community" over the past 3 years?





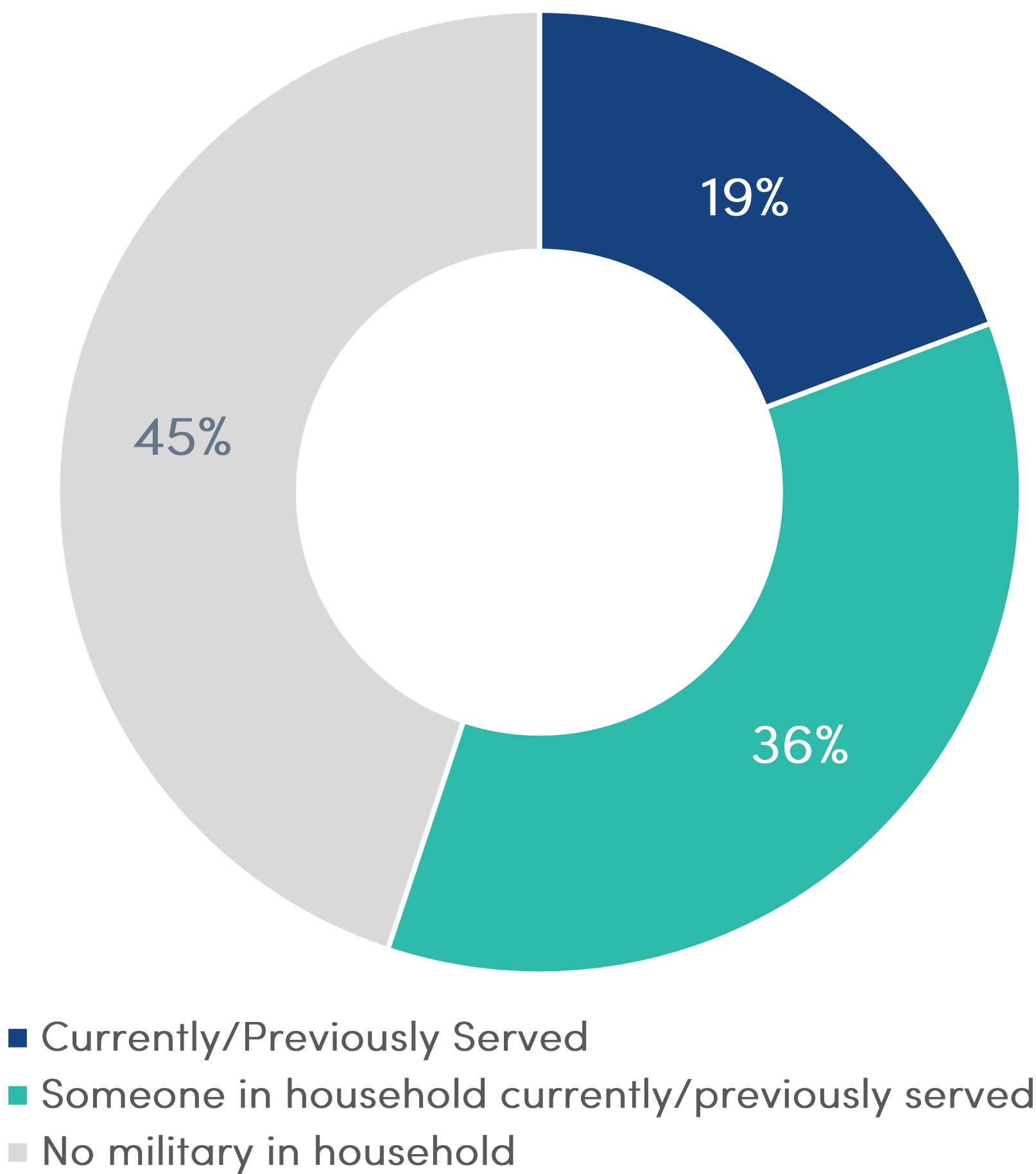
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# Appendix

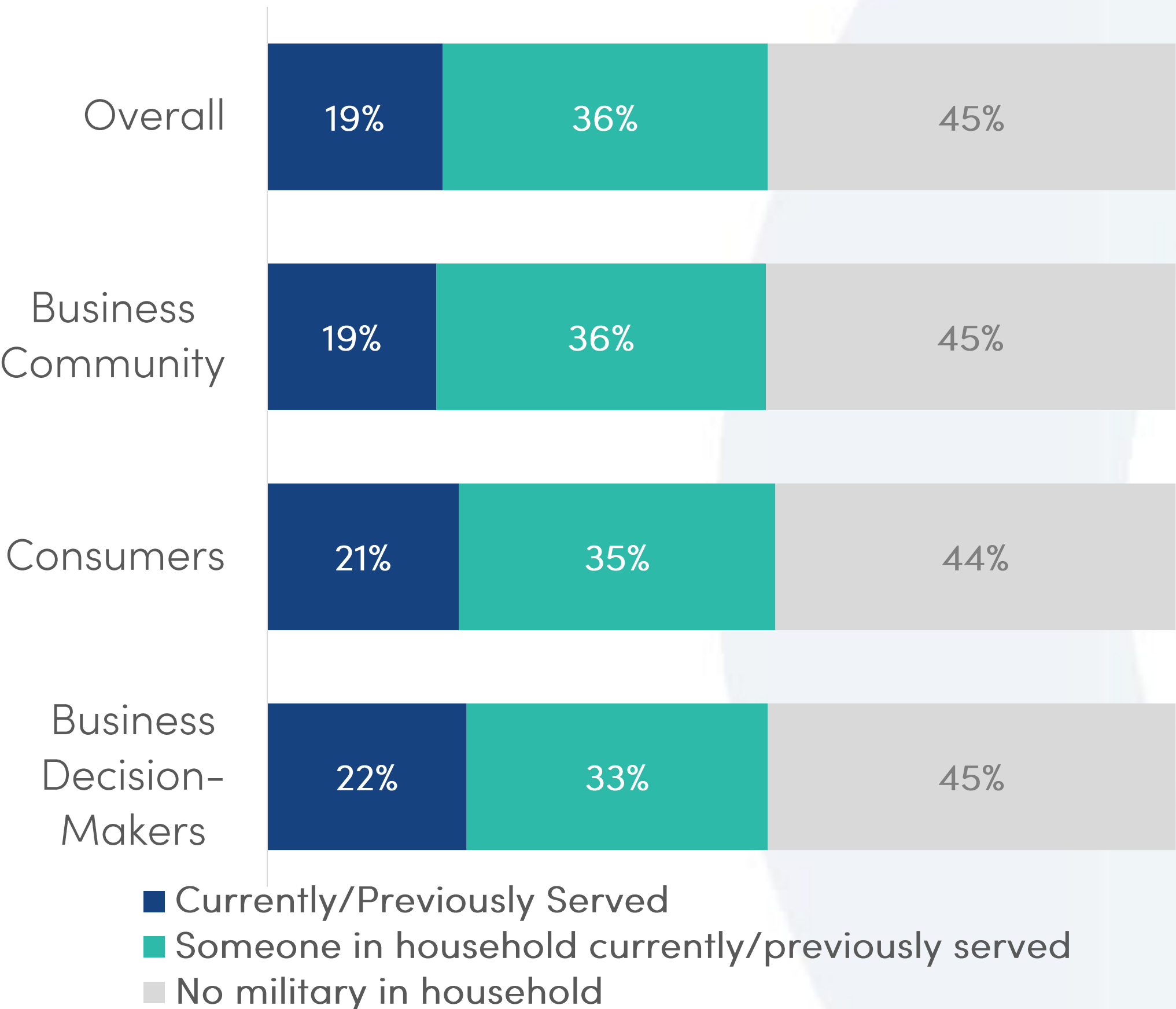


# More than half of area stakeholders have either served or have someone in their household who has served in the military.

Military Service



Military Service by Niche



Q30: Are you, or anyone in your immediate household, currently serving or have you ever served in the military?



# Demographic Categorization

	Overall	Business Community	Consumers	Decision Makers
Average Adult Age in Household	48.4	47.5	52.9	48.0
Average Child Age in Household	9.8	9.6	11.3	10.4
% Under 12 in Household	14%	15%	8%	15%
% 12-17 in Household	11%	11%	10%	12%
% 18-34 in Household	18%	18%	14%	16%
% 35-54 in Household	30%	31%	25%	32%
% 55+ in Household	27%	25%	43%	25%
Family Households	55%	57%	42%	56%
Adult-Only Households	45%	43%	58%	44%
% College Education+	67%	72%	55%	78%
Household Income	\$97.9k	\$103.3k	\$82.0k	\$127.1k

Q31: Including yourself, how many people in your household fall into the following age categories? Q32: What is the highest degree or level of school you have completed? Q33: Which of the following categories best represents your total annual household income before taxes? Q34: Which ethnicity do you consider yourself? Please respond for you personally, not for others in your household?





THANK YOU

# GET IN TOUCH WITH US

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