

Fayetteville Comparative Study

Updated Summary Report

April 6, 2006

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Purpose of the Study

- Measure, compare and contrast “negative” aspects of Fayetteville versus similar metropolitan areas.
- Analyze existing data for greater insights into marketing strengths and weaknesses of Fayetteville.

Comparative segments for geographic areas

- Based upon 331 US MSA's (Metropolitan Statistical Areas)
- Group A
 - 39 Markets of similar size (MSA's ranging from 248,000 to 393,000 population)
 - Excluded 6 NE US markets due to geographic inconsistency (suburbs and commuter markets)
- Group B
 - 18 Markets within NC, SC, and Norfolk (VA)
- Group C
 - 12 Markets profiled as “Military cities” by the 2004 edition of Cities Ranked and Rated by Bert Sperling & Peter Sander

Data sources

- Cities Ranked and Rated
- US Census Bureau business data
- Harris Data (D&B) business listings

Negative Categories

- Tattoo parlors (SIC code 72990106)
- Massage parlors (SIC code 72990201,02)
- Check cashing services (SIC code 6099)
- Drinking places (SIC code 58013)
- Pawn shops (SIC code 5222981)

Group A Markets - Size

- Fayetteville NC
- Appleton WI
- Biloxi MS
- Boulder CO
- Brazoria TX
- Brownsville TX
- Charleston WV
- Columbus GA
- Corpus Christi TX
- Davenport IA
- Erie PA
- Evansville IN
- Fayetteville AR
- Fort Collins CO
- Galveston TX
- Hamilton OH
- Hickory NC
- Huntington WV
- Huntsville AL
- Killeen TX
- Lafayette LA
- Lincoln NE
- Macon GA
- Montgomery AL
- Naples FL
- Ocala FL
- Peoria IL
- Provo UT
- Reading PA
- Reno NV
- Rockford IL
- Salem OR
- Savannah GA
- Shreveport LA
- South Bend IN
- Springfield MO
- Tallahassee FL
- Visalia CA
- York PA

Group B Markets - Area

- Fayetteville NC
- Asheville NC
- Charleston SC
- Charlotte NC
- Columbia SC
- Florence SC
- Greensboro NC
- Greenville NC
- Greenville SC
- Goldsboro NC
- Hickory NC
- Jacksonville NC
- Myrtle Beach SC
- Norfolk VA
- Raleigh NC
- Rocky Mount NC
- Sumter SC
- Wilmington NC

Group C Markets - Military

- Fayetteville NC
- Anniston AL
- Columbus GA
- Clarksville TN
- Enid OK
- Ft. Walton Beach FL
- Jacksonville NC
- Killeen TX
- Lawton OK
- Panama City FL
- Pensacola FL
- Sumter SC

Index Calculations

- 62 unique markets
- Incidences of “negative” locations per population
- Lower incidences are “better”
- Create overall averages in each category
- Combine overall averages into a “dismal” index where 100 would be the average

Fayetteville Data

- Tattoo score = 4.62 (average = 2.02)
- Massage score = .99 (average = 4.22)
- Check cashing score = 4.62 (average = 4.58)
- Drinking places score = 26.07 (average = 29.62)
- Pawn shop score = 9.24 (average = 6.50)
- Overall index = 116.59

Group A – “Worst” markets

Rank	MSA	State	Overall Index	Tattoo Index	Massage Index	Check Cashing Index	Drinking Index	Pawn Index
1	Fort Collins	CO	161.20	3.41	10.61	3.41	43.94	10.61
2	Biloxi	MS	159.28	2.17	1.09	14.40	32.61	15.49
3	Boulder	CO	146.28	1.43	15.05	3.23	37.99	6.81
4	Reno	NV	131.11	3.04	9.67	3.87	46.69	2.21
5	Lincoln	NE	130.25	2.72	6.61	5.84	43.97	5.45
6	Galveston	TX	124.74	2.30	6.90	1.15	49.81	9.96
7	Davenport	IA	119.73	2.79	5.03	3.35	60.34	4.19
8	Naples	FL	118.09	0.36	14.13	2.17	19.93	7.97
9	Fayetteville	NC	116.59	4.62	0.99	4.62	26.07	9.24
10	Killeen	TX	113.91	2.82	5.96	3.76	16.93	9.72

Fayetteville ranks 9th worst of 33 similar-sized markets.

Group A – “Best” markets

Rank	MSA	State	Overall Index	Tattoo Index	Massage Index	Check Cashing Index	Drinking Index	Pawn Index
9	Fayetteville	NC	116.59	4.62	0.99	4.62	26.07	9.24
31	York	PA	75.40	4.11	2.57	1.03	24.42	0.51
32	Erie	PA	73.39	2.14	1.43	1.43	56.43	0.36
33	Reading	PA	71.62	2.09	5.24	0.52	31.68	0.79
34	Evansville	IN	71.11	1.01	3.37	2.02	32.32	4.71
35	Brownsville	TX	70.15	1.98	1.98	1.98	18.41	6.52
36	Provo	UT	68.28	1.03	6.98	3.36	4.65	2.33
37	Huntington	WV	65.15	2.24	1.92	3.19	12.14	3.83
38	Hickory	NC	62.58	1.43	4.01	3.72	12.89	1.43
39	Charleston	WV	60.14	1.61	1.61	0.00	30.24	5.24

Fayetteville ranks poor among similar-size cities due to higher indices of tattoo and pawn establishments.

Group B – “Worst” Markets

Rank	MSA	State	Overall Index	Tattoo Index	Massage Index	Check Cashing Index	Drinking Index	Pawn Index
1	Jacksonville	NC	176.69	8.72	2.01	5.37	42.28	9.40
2	Myrtle Beach	SC	146.05	0.49	6.80	9.22	59.71	9.22
3	Florence	SC	145.17	0.00	0.79	17.32	29.13	14.96
4	Wilmington	NC	126.71	3.69	6.97	4.51	36.89	4.10
5	Fayetteville	NC	116.59	4.62	0.99	4.62	26.07	9.24
6	Greenville	NC	108.14	2.19	5.11	5.11	29.20	6.57
7	Asheville	NC	107.40	2.60	8.66	1.73	23.38	5.63
8	Sumter	SC	100.24	0.00	1.90	16.19	8.57	4.76
9	Charleston	SC	94.28	0.18	4.27	9.25	26.87	4.45
10	Goldsboro	NC	90.48	0.88	0.00	9.73	17.70	8.85

Fayetteville ranks 5th worst among 18 North Carolina/ South Carolina markets.

Group B – “Better” Markets

Rank	MSA	State	Overall Index	Tattoo Index	Massage Index	Check Cashing Index	Drinking Index	Pawn Index
5	Fayetteville	NC	116.59	4.62	0.99	4.62	26.07	9.24
11	Greensville	SC	85.63	0.10	2.94	10.53	17.21	4.25
12	Columbia	SC	85.13	0.00	2.90	8.51	17.57	7.25
13	Raleigh	NC	79.48	1.26	4.65	4.18	21.53	3.94
14	Charlotte	NC	76.55	1.45	3.53	3.79	17.22	5.62
15	Norfolk	VA	71.99	1.31	2.87	6.42	15.58	2.24
16	Greensboro	NC	65.46	1.71	3.34	3.58	18.90	1.40
17	Rocky Mount	NC	63.25	1.39	2.08	4.86	14.58	2.78
18	Hickory	NC	62.58	1.43	4.01	3.72	12.89	1.43

Fayetteville ranks in the bottom third of NC/SC markets due higher indices for tattoo and “drinking” establishments.

Group C – All Markets

Rank	MSA	State	Overall Index	Tattoo Index	Massage Index	Check Cashing Index	Drinking Index	Pawn Index
1	Jacksonville	NC	176.69	8.72	2.01	5.37	42.28	9.40
2	Anniston	AL	165.10	3.57	0.89	9.82	12.50	24.11
3	Panama City	FL	158.07	5.30	6.62	3.31	46.36	9.27
4	Ft. Walton Beach	FL	149.99	3.43	10.29	2.29	35.43	10.86
5	Fayetteville	NC	116.59	4.62	0.99	4.62	26.07	9.24
6	Killeen	TX	113.91	2.82	5.96	3.76	16.93	9.72
7	Law ton	OK	110.67	0.88	2.65	3.54	32.74	16.81
8	Columbus	GA	106.95	2.55	2.18	2.18	17.09	16.36
9	Sumter	SC	100.24	0.00	1.90	16.19	8.57	4.76
10	Pensacola	FL	79.75	2.12	4.01	2.36	26.42	3.77
11	Clarksville	TN	77.19	0.96	0.00	6.22	22.97	8.13
12	Enid	OK	68.40	0.00	0.00	3.51	38.60	8.77

Fayetteville ranks 5th among “military” cities, with generally average ranking for most categories; slightly better for less incidences of massage parlors.

High Incidence markets by category

- **Tattoo**
 - Jacksonville NC (8.72)
 - Panama City (5.30)
 - Fayetteville NC (4.62)
- **Massage**
 - Boulder (15.05)
 - Naples (14.13)
 - Fort Collins (10.61)
- **Check Cashing**
 - Florence (17.32)
 - Sumter (16.19)
 - Biloxi (14.40)
- **Drinking Places**
 - Appleton (89.34)
 - Davenport (60.34)
 - Myrtle Beach (59.71)
- **Pawn Shop**
 - Anniston (24.11)
 - Lawton (16.81)
 - Columbus, GA (16.36)

Where others rank Fayetteville

- According to Cities Ranked and Rated, Fayetteville ranked 250 of 331 markets
- Lower rankings
 - Leisure (9 on a scale of 1-100)
 - Health & healthcare (12)
 - Arts & culture (19)
 - Crime (27)
 - Transportation (27)

Conclusions and Implications

- Difficult to make a strong case that Fayetteville is better than other markets, although it does appear fairly average for military markets.
- Assessing negative aspects may more be of a function of location or geographic clustering than frequency
- National comparative analysis does not consider general geographic location and nearby access.
- Accenting the positive and nearby features of Fayetteville would improve the overall position of the market
 - Proximity to hospital services of Raleigh/ Durham
 - Proximity to central NC recreational opportunities (beach, golf, mountains)
 - Proximity to cultural opportunities in many nearby markets (museums, children's opportunities)