CUMBERLAND COUNTY, NC
FAYETTEVILLE
AREA
CONVENTION AND VISITORS BUREAU

Fayetteville/Cumberland County Visitor Market Study

Report Delivered January 2022

H2R

FAYETTEVILLE/CUMBERLAND COUNTY
VISITOR MARKET STUDY

Project Overview

Purpose. The purpose of conducting the Fayetteville/Cumberland County Visitor Market Study is to amplify the voice of the regional marketplace by measuring Fayetteville/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/Cumberland County visitor profile, examines barriers to visitation and provides a demographic/behavioral profile of visitors and non-visitors.

Throughout the presentation, brand insights have been compared to competitive set averages and H2R's Proprietary Industry Norms (H2R Norms) where applicable to help provide a deeper understanding of how Fayetteville/Cumberland County performs relative to both its competitive set and against destinations around the country.

Target Audience. This quantitative survey was conducted among a professionally managed panel of travelers living within 250 miles of Fayetteville/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 +/-3.5% at a 95% confidence interval.

FAYETTEVILLE/CUMBERLAND COUNTY
VISITOR MARKET STUDY

Executive Summary

Fayetteville/Cumberland County is viewed as a historic, military town.

- **COVID-19 changed everything.** It disrupted our habits, altered our beliefs and ultimately changed our behaviors. And that may present a challenge for marketers in nearly every industry—especially in travel and tourism. But, in Fayetteville's case, this tectonic shift may deliver a reset opportunity to re-establish the brand and convert it into a more compelling tourism destination as new travel habits are being formed.
- **The Mid-Atlantic region is not yet back up to full speed.** That is, one-third of area travelers remain "hunkered down" and have done so since the pandemic began. They have not yet ventured out for any type of leisure travel. And, across a battery of indicators, regional travelers indicated that the area is only roughly 53% back to what they might consider "normal." Fortunately, leisure and car travel are a bit further along than business, international or group travel; but COVID-19 very much remains a clear and present hurdle. The key is to be ready to welcome visitors when they feel safe getting back to engaging in leisure travel. In its current state, most travelers are not likely to think of Fayetteville/Cumberland County when they are ready to resume traveling again.
- **Fayetteville/Cumberland County is viewed as a Historic, Military Town.** Regional travelers across Fayetteville/Cumberland County's 300-mile trade area currently describe the area as a Historic Military Town. It is also nice, fun, historical, and much more than that. But as is, it is not top-of-mind as a regional tourism hub. In fact, only 0.3% mentioned Fayetteville or Cumberland County when asked an open-ended question about places across the region they most enjoy visiting.

Area is not viewed as a leisure or business travel destination

- **Fayetteville/Cumberland County is not currently viewed as a travel destination.** Both leisure travel (vacations/weekend getaways) and business travel (business/work/combination with leisure) account for only 19% and 13% of all visits collectively. Meanwhile, visiting friends & family accounts for nearly one-third of all visits and even just passing through ranks higher at 21%.
- **Plenty of upside.** Yet, plenty of upside exists across the region in both leisure travel and business meetings/convention trade. While Fayetteville/Cumberland County's market share of recent visitors (44%) is a bit low, it's quite competitive in context to its competitors' average of 48%. Likewise, both its conversion and retention rates are also competitive—slightly below average, but still in the ballpark.
- **Reputation and lower share of voice complicate matters.** Part of the challenge has to do with Fayetteville/Cumberland County's reputation as a tourism destination. Only 53% say they have a positive opinion of the area, ranking it fifth out of the destinations tested and well below the competitive set's average of 60%. Likewise, only 25% recall hearing/seeing/viewing any marketing/advertisements for Fayetteville/Cumberland County in the past six months. And while that is competitive against the comp set's average of 27%, it is another indicator that as a travel destination Fayetteville/Cumberland County continues to fall "below the scroll."
- **Differentiated by patriotism.** Another challenge for the mass travel audience across the region is that Fayetteville/Cumberland County doesn't have any differentiating characteristics that are currently inspiring visitation. While the area owns "patriotism" with a score that indexes 76% higher than average, it falls below average on every other attribute evaluated including Downtown (77), Charm (79), Museums (86) and Spectator Sports (99).

Strengths include friendly, welcoming people and value.

- **Strengths & Concerns**. It's not that Fayetteville/Cumberland County has a negative vibe, it's just that it doesn't stand apart from other destinations in any positive or compelling way. The destination has plenty of strengths (attributes that are considered more important than average and upon which Fayetteville/Cumberland County receives description scores that are above average from recent visitors). These include friendly people, good value, lots to see and do and great place to spend time with friends. However, there are also a few key concerns such as great culinary experiences, great place to rest and relax and even offering beautiful scenery. Fayetteville/Cumberland County also scores above average for its history, historic sites and celebration of the American Spirit but these are all considered less important than average among regional travelers.

- **Visitor Profile.** The recent visitor profile reveals that the average visitor is 43.7 years old, 49% visited with children in their parties on their last visit, 58% spent the night and stayed for an average of 1.8 nights and spent $449 per party. Compared to lapsed visitors, however, recent visitors are more likely to have been visiting on day-trips and less likely to be visiting for leisure or with children in their party.

Variety of functional and emotional drivers inspire visitation

- **Primary Points of Interest.** The most popular activities/attractions travelers patronize when they visit Fayetteville/Cumberland County are shopping, downtown/urban center, military/history sites, outdoor recreation and museums (in general). No specific attraction ranks in the top five. The most popular individual attractions include the Fayetteville History Museum, Airborne Special Operations Museum and Cape Fear Botanical Garden. Based upon data generated from geolocation intelligence, Segra Stadium and the Crown Complex would likely also be in this list.
- **Select POIs derive most of their visitation from residents.** Interestingly, however, geolocation intelligence also reveals that these most popular individual attractions derive most (70%+) of their visitation from residents living within 50 miles and only a fraction of that (<30%) from tourism. In fact, of the attractions mentioned above, ASOM was the top attraction to derive its visitation from tourists traveling more than 50 miles and it averaged only 48% tourists.
- **Emotional motivators may be more inspirational.** It is probable, however, that functional motivators like specific activities or attractions are not as compelling in the long run as higher order emotional needs that travelers seek to satisfy. In Fayetteville/Cumberland County's case, the "opportunity to spend time together with friends and loved ones" is the primary reason they last visited followed by "others in my family or travel party wanted to go" and "desire to getaway and escape the everyday pressures of life."

America's Hometown is the preferred brand position

- **Spending.** As suspected, visitor spending varies considerably by the purpose of the trip. That is, leisure travelers report spending the most at $877 per party while business travelers come in second at $502 per party followed by travelers visiting friends & family at $489 and all other which average $297 per party.
- **VisitFayetteville.com.** Another challenge facing FACVB is identifying the optimal URL for potential travelers to search and find information on the area. The good news is that most travelers say they would indeed be most likely to go to Visit Fayetteville first. This was true for all segments. The bad news is that the other two-thirds are more likely to go to Discover Fayetteville, Explore Fayetteville, Go Fayetteville or some other combination. And even those who say they would go to VisitFayetteville.com must also remember to include the "NC" at the end.
- America's Hometown. Among the brand positions evaluated in an A/B/C/D split in this study, "America's Hometown" was the clear winner sporting 58% intent. All of the others clustered together in a distant second place. These included History, Heroes and a Home Town Feeling (47%), All-American City (46%), and a Special Place (46%). Of course, based upon the preponderance of information gleaned from this assessment, the next challenge will be to define this brand position in such a way that it inspires travelers to want to visit Fayetteville/Cumberland County.

Barriers to visitation include no "must sees," never comes to mind and lack of recommendations from friends.

- **Hurdles/Barriers.** Lastly, this study also explored the barriers that prevent some travelers from visiting Fayetteville/Cumberland County and others from returning. In addition to asking lapsed/non-visitors to react to specific stated hurdles, we also evaluated their derived hurdles by correlating each response back to their previous answer regarding intent to visit. This is because in some cases people don't have a very good handle on why they do or do not do things and sometimes a stated response approach can generate more excuses than explanations. By evaluating both, we are better able to separate the real issues for not visiting from potential excuses.
- While some explanations were challenging because they are somewhat beyond FACVB's control, e.g., Have other places I prefer to visit, etc., most are actionable and include things such as:
  - No "must sees" compelling me to visit/return.
  - Just never comes to mind.
  - Nothing new of interest that I would like to experience.
  - Have not had anyone recommend it to me.

Thoughts to Consider

- **Cumberland County Needs a Purple Cow.** Fayetteville/Cumberland County needs a "Purple Cow" or what Seth Godin, the famous marketing guru, describes as a unique must-see experience that stands apart from the crowd. Fayetteville/Cumberland County offers a broad array of activities and attractions travelers enjoy, but most of these are general in nature and can be found other places. The objective is to identify an attraction, activity or experience that is inherently unique to Fayetteville/Cumberland County that could provide legitimate differentiation. A "purple cow" need not be huge or expensive. But it must be compelling, unique and "share-worthy" in order to generate market buzz and provide a reason for travelers to turn their heads, to visit and/or to return.
- **Brand Alignment.** Travelers are divided in how they would search for information on Fayetteville/Cumberland County. Some would go to VisitFayetteville.com (may or may not include the NC), others would search Discover Fayetteville. Some consideration should be given to rebranding the area and consolidating the multiple monikers under one overarching umbrella brand that somehow leverages the historic military hometown feel. The marketplace is quite cluttered and aligning upon one clear brand image could help make it easier for Fayetteville/Cumberland County to stand out a bit more among competitors. The idea is to differentiate the area in a compelling way that raises awareness, increases market potential and converts more considerers into visitors.

Thoughts to Consider

- **One Clear Brand Message.** Few destinations have the size of budgets necessary to effectively communicate multiple messages with multiple brand associations. That is why it is mission critical that FACVB not only consider rebranding the region as a travel destination, but also develop one clear and simple brand message that unites the entire county around one theme. E Pluribus Unum.
- **Emotional Connection.** Product variety is great, and Fayetteville/Cumberland County has a variety of functional activities for travelers to enjoy. But, like most destinations, the biggest reasons for traveling tend to involve satisfying travelers' higher order emotional needs. In Fayetteville/Cumberland County, the biggest emotional driver is spending time together with friends and family and/or escaping the stresses of everyday life. Finding ways to tell travelers about the area's key functional drivers in a way that leverages these emotional connections may help reach new audiences and drive greater repeat. As they say, "sell the sizzle, not the bacon." Or, in this case, sell the emotion of the experience, not the elements that comprise the experience.

Thoughts to Consider

- **Leverage Recommendations from Friends and Family.** Consumers today have little trust in advertising or government, but they do tend to trust each other. In fact, most consumers put greater faith in anonymous online reviews from past brand users than they do paid advertisements for the same brand. In the age of social media, the experience itself is often the best marketing. This is why recommendations from trusted sources have become the gold standard in consumer influence. Perhaps that is why customers generated through word of mouth reportedly have lifetime values that are worth four times that of customers generated through any other type of advertising. Fayetteville/Cumberland County may wish to consider ways to proactively identify their brand promoters and provide them with the information and resources necessary to help them encourage others to visit. After all, lack of recommendations is one of the primary barriers keeping some travelers away.

Future Research Considerations

The comprehensive market insights generated from regional travelers in this study is not the end of the process of research-generated marketing. It is not even the beginning of the end. In fact, it is likely just the end of the very beginning.

Based upon the preponderance of insights generated this past year, H2R recommends that FACVB consider the following types of research studies next…

2022 Scout Report by Quarter

Determine precisely where recent visitors are coming from in order for marketing to react in a timelier manner.

$8,495

Lodging Multiplier Model

Visitation projection model based upon insights into the % of visitors who stay in hotels, STR occupancy rates, etc.

$3,295

Brand & Marketing Effectiveness

Measures the degree to which marketing impacts perception of Fayetteville/Cumberland County as a tourism destination.

$19,995

Ongoing Regional Traveler Profile

Quarterly visitor profile that tracks regional travel trends & Cumberland County visitor behavior & demographics.

$19,995

Quarterly Visitation Projections

Quarterly KPIs are used to generate a weighted algorithm that measures the area's overarching quarterly performance.

$2,495

Geolocation Intel on Select Attractions

Assess estimated visitation, trade area, behavior and visitor profiles of up to 6 area tourist attractions.

$3,995

FAYETTEVILLE/CUMBERLAND COUNTY
VISITOR MARKET STUDY

Traveler Sentiment

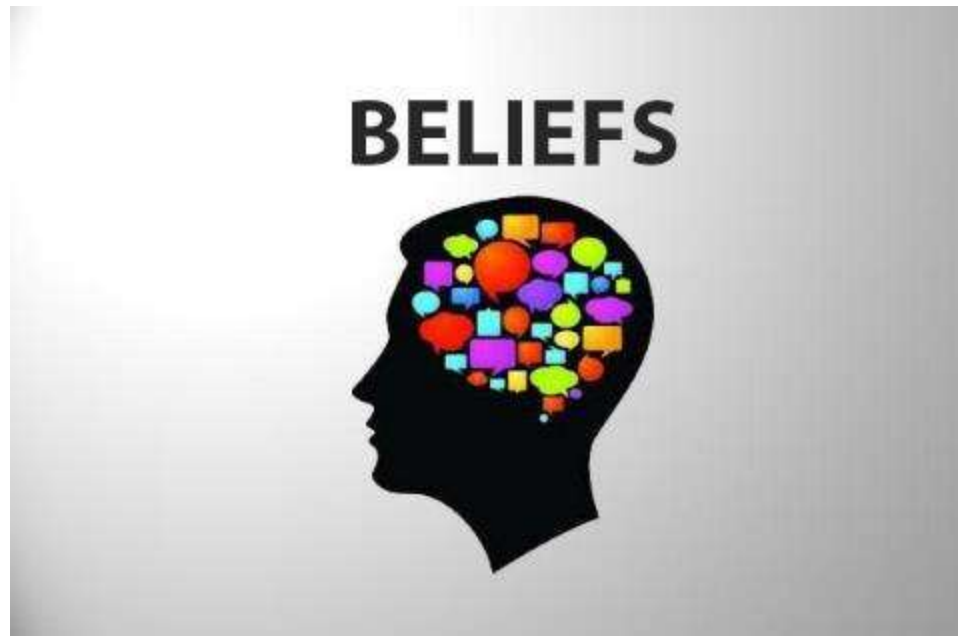
TRAVELER SENTIMENT

Early Adopters	Average % of Normalcy	Intent to Travel for Leisure	Intent to Travel for Business
67%	53%	75%	31%


Let’s begin by addressing the
“Elephant in the Room.”
COVID-19 changed everything.

COVID-19 shut down tourism, confined us to our homes and altered the way we do business. And, as Newton's Law of Motion reveals, "every action has an equal and opposite reaction."

Disrupted Our Habits



Altered Our Beliefs

Changed Our Behaviors

Reset the Marketplace

Changed the Game?

COVID-19 altered traveler habits in a manner no other event in modern history has done.

- COVID-19 disrupted our habits, altered our beliefs and ultimately changed our behaviors. And that may present a challenge for marketers in nearly every industry—especially in travel and tourism.
- When intuitive habits are broken, it can be difficult to get travelers back into the same groove they were in before. Habits provide us with a means of conserving energy. Thus, most decisions are often the result of long-established habits rather than a mindful decision process taking place on each occasion.
- Given the depth of COVID-19's disruption, decisions to travel, to visit specific destinations and/or decisions to engage in specific types of activities or visit specific attractions have been impacted.

So, where are regional travelers now?

Traveler Sentiment | Risk Tolerance Segments

Some travelers (Early Adopters) have taken a leisure trip since the COVID-19 pandemic began in March 2020. But there remain many others who have far greater concerns which have kept them "hunkered down" at home. These beliefs around one's own risk tolerance to COVID-19 have placed travelers in one of five different travel buckets.

LAGGARDS

Need to see a safe and effective vaccine adoption rate and an end to all virus fears.

EARLY ADOPTERS

No fear, few masks, have already visited attractions while traveling for leisure

LATE ADAPTERS

Need to see a steady decline in the number of new COVID-19 cases.

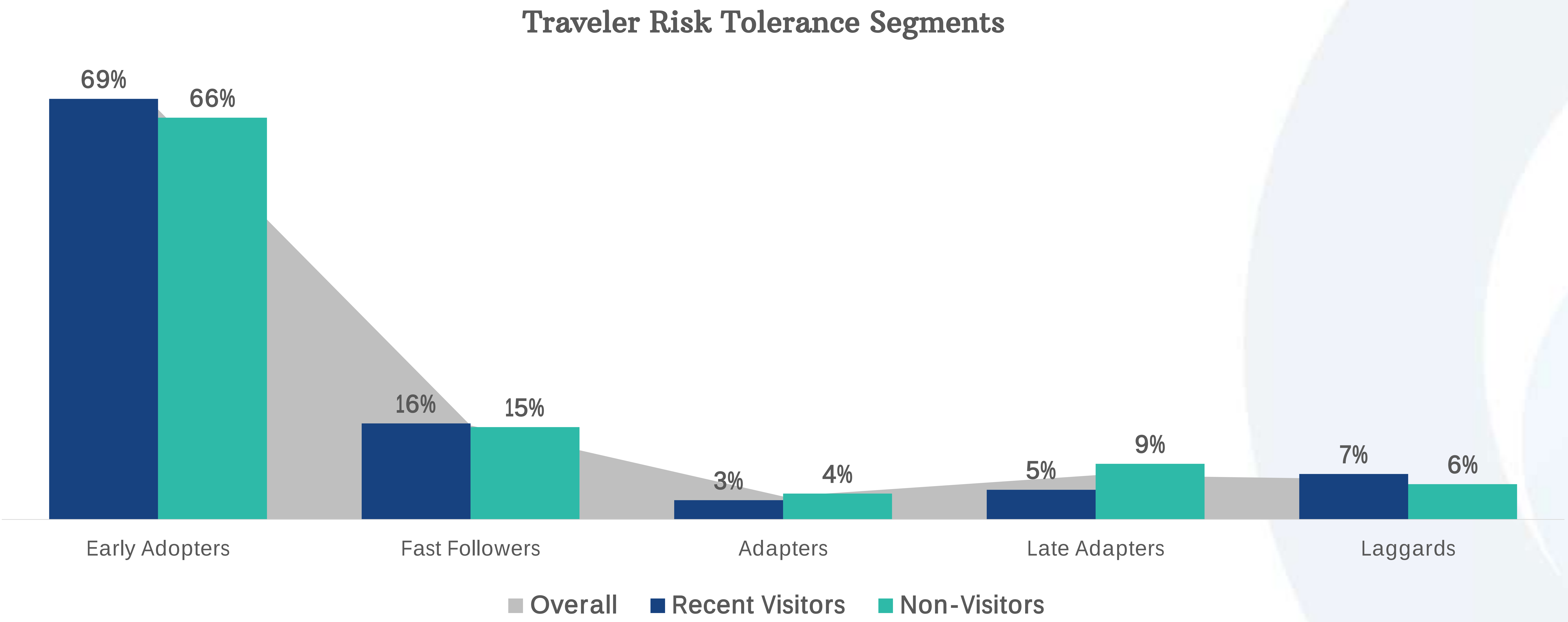
ADAPTERS

Need to see others traveling safely first (Fall/Holiday).

FAST FOLLOWERS

Travel & attractions visits are planned, and trips are imminent

Most travelers across the region have taken some form of leisure getaway since the pandemic began. Yet more than 30% remain "hunkered down" at home meaning that the regional travel industry still has quite a ways to go before it is back to "normal."



Q10: Which of the following phrases best describes you and your travel/attraction behavior since the COVID-19 pandemic began in March 2020?

RESPONDENT BASE: ALL RESPONDENTS | N=800

Journey Toward the Next Normal

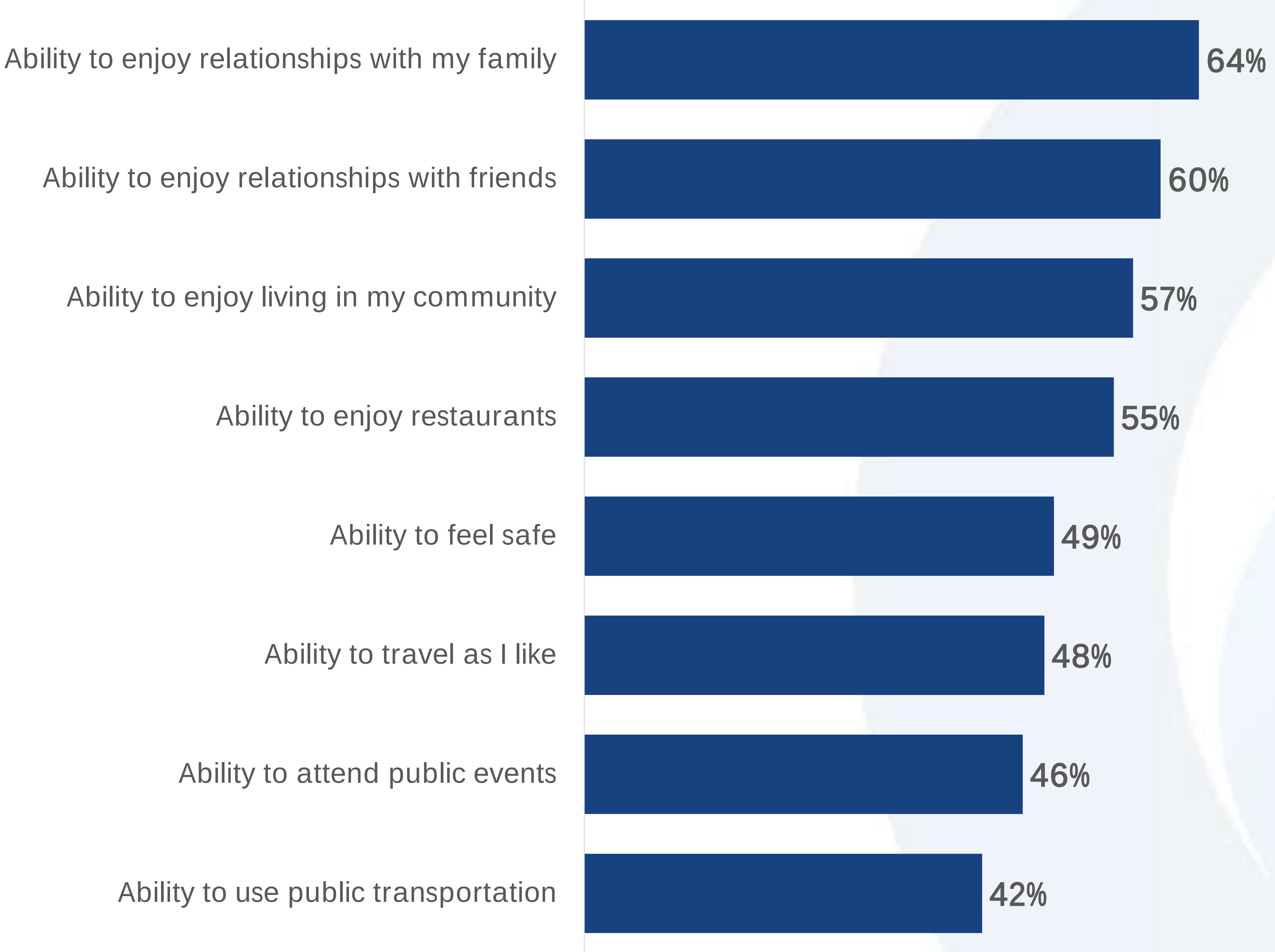
Traveler Sentiment

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. Taking all these various aspects of life into consideration, respondents indicated they feel they are at about 53% of normal.

Those activities that had returned to be closest to normal included relationships with family (64%) and friends (60%), enjoyment living in my community (57%) and ability to enjoy restaurants (55%).

Conversely, things like public transportation (42%), attending public events (46%) and ability to travel as I like (48%) still have a ways to go before returning to the next normal.

% Approaching/Already Completely Normal



Q11: Overall, relative to the rest of the country how do you believe your part of the country is doing in terms of resuming leisure activities, dining out, staying overnight at hotels, taking overnight leisure trips, etc.?

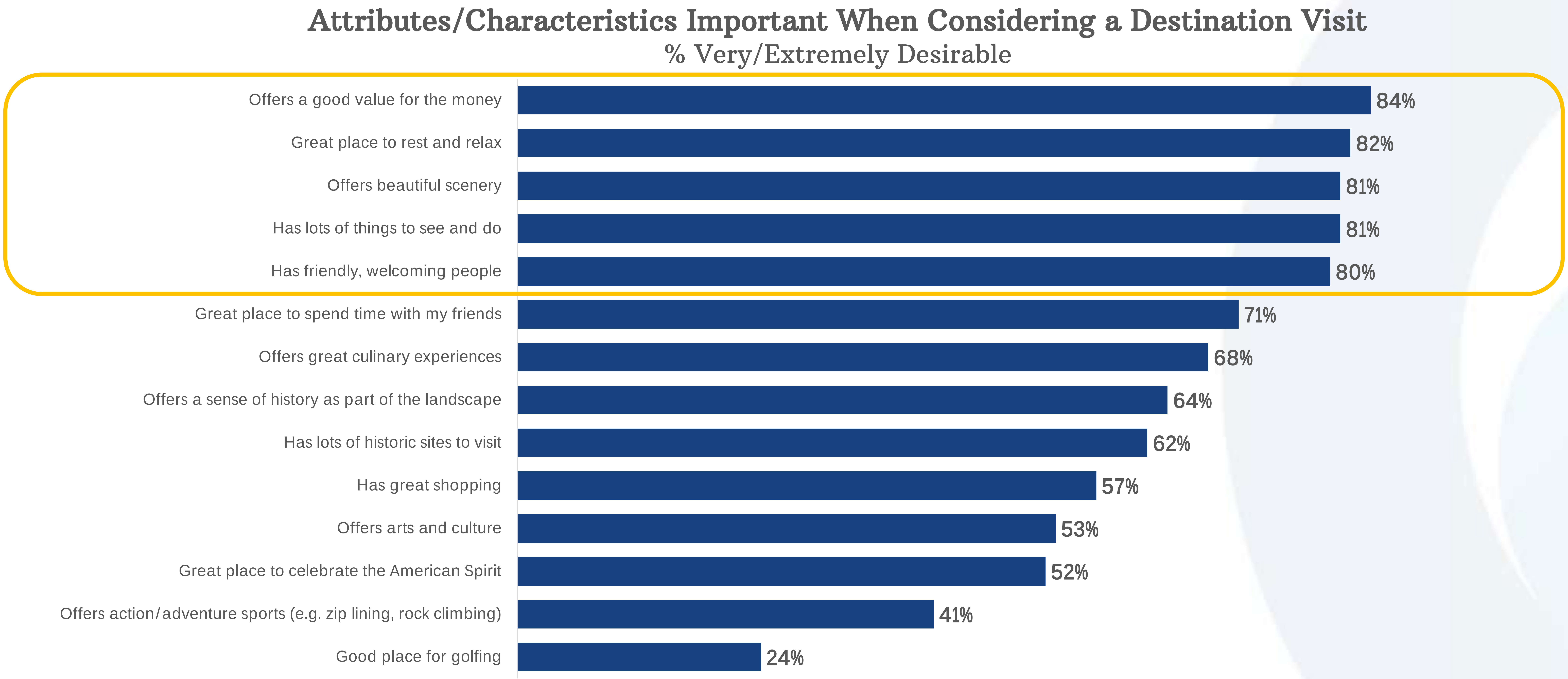
RESPONDENT BASE: ALL RESPONDENTS | N=800

More than three-quarters of regional travelers plan to travel for leisure in 2022 and primarily by car. However, select types of travel (business, international, group tours, cruise ships) all have levels of intent that run much lower.

Q12: Using the scale provided, please indicate your intent to engage in each of the following activities in the next 12 months.

RESPONDENT BASE: ALL RESPONDENTS | N=800

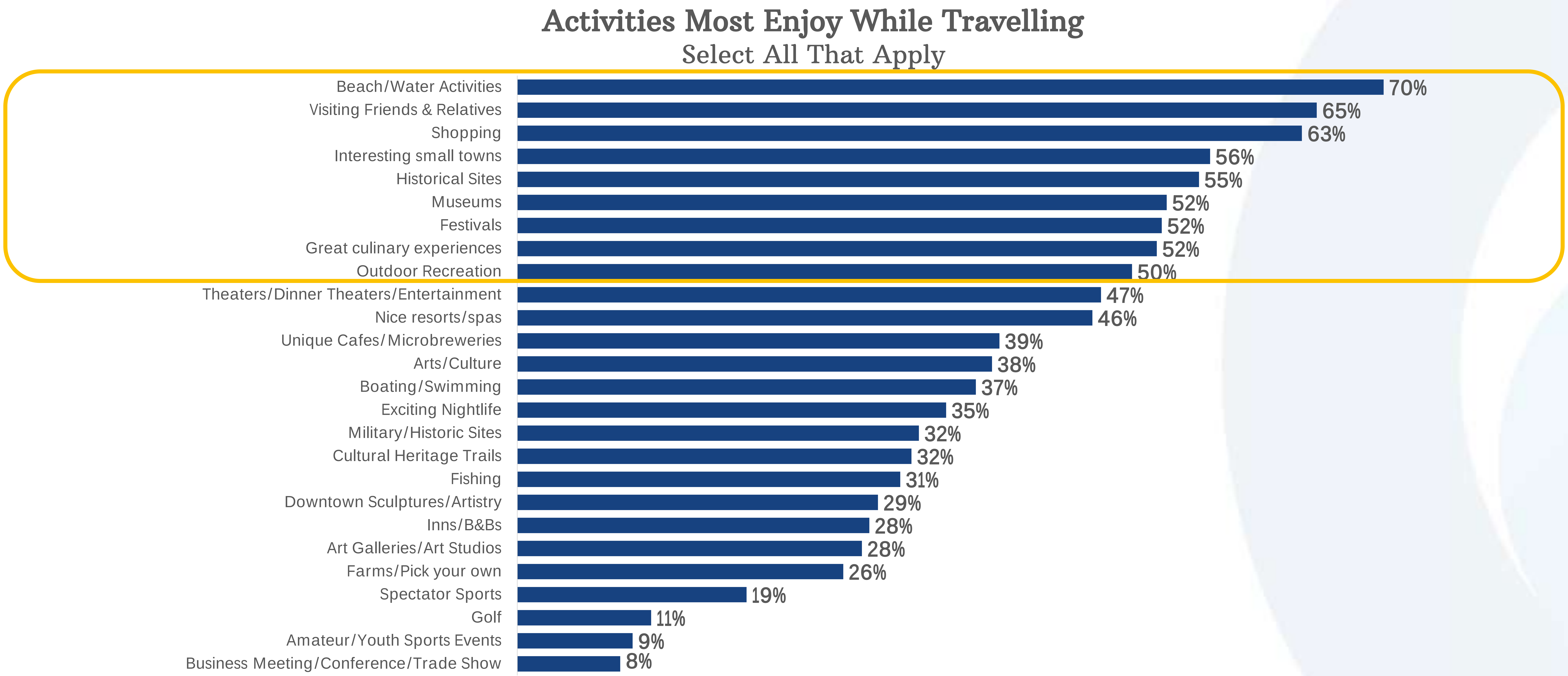
The most important attributes regional travelers consider when evaluating a regional destination are value, relaxation, beautiful scenery with lots of things to see & do.



Q13: Please indicate how desirable you find each of the following attributes or characteristics when considering visiting a destination. (5-pt. scale)

RESPONDENT BASE: ALL RESPONDENTS | N=800

The most popular travel activities they seek out include water activities, visiting with friends & relatives, shopping, interesting small towns, historic sites and museums.



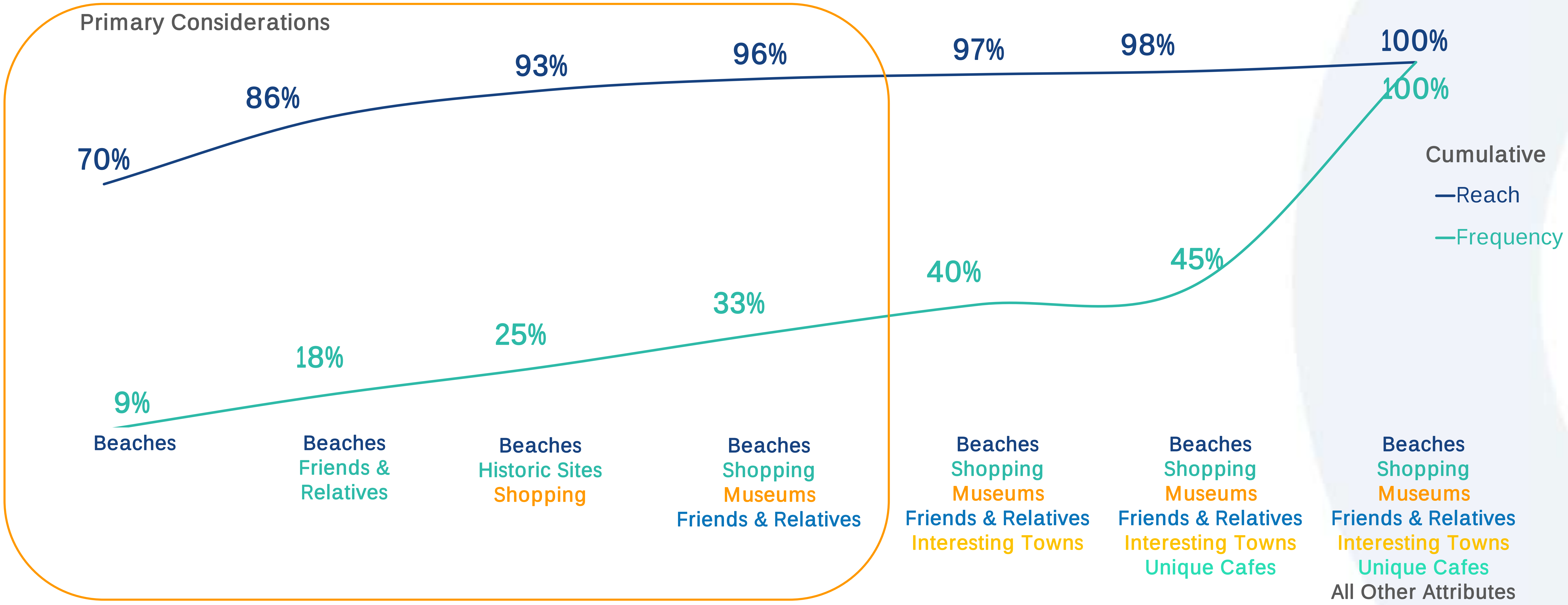
Q14: What activities do you most enjoy when traveling? Please select all that apply.

RESPONDENT BASE: ALL RESPONDENTS | N=800

Destination Choice Drivers

TURF* Analysis measures the "total unduplicated recency & frequency" of prospects preferred travel activities. Out of 26 travel activities evaluated, the four unduplicated activities that have the greatest reach and frequency include Beaches, Shopping, Museums and Visiting Friends & Relatives—which reach 96% of all prospects and account for 33% of all activities enjoyed.

Optimal Combination of Activities Driving Interest in Regional Destinations



Q14: What activities do you most enjoy when traveling? Please select all that apply.

**TURF = Total Unduplicated Reach and Frequency*

RESPONDENT BASE: ALL RESPONDENTS | N=800

FAYETTEVILLE/CUMBERLAND COUNTY
VISITOR MARKET STUDY

Brand Health & Perceptions

BRAND HEALTH SUMMARY

Unaided Awareness

0.3% Fayetteville/ Cumberland County

1.1% Competitive Set Average

Reputation

53% Fayetteville/ Cumberland County

60% Competitive Set Average

Intent to Visit

44% Fayetteville/ Cumberland County

47% Competitive Set Average

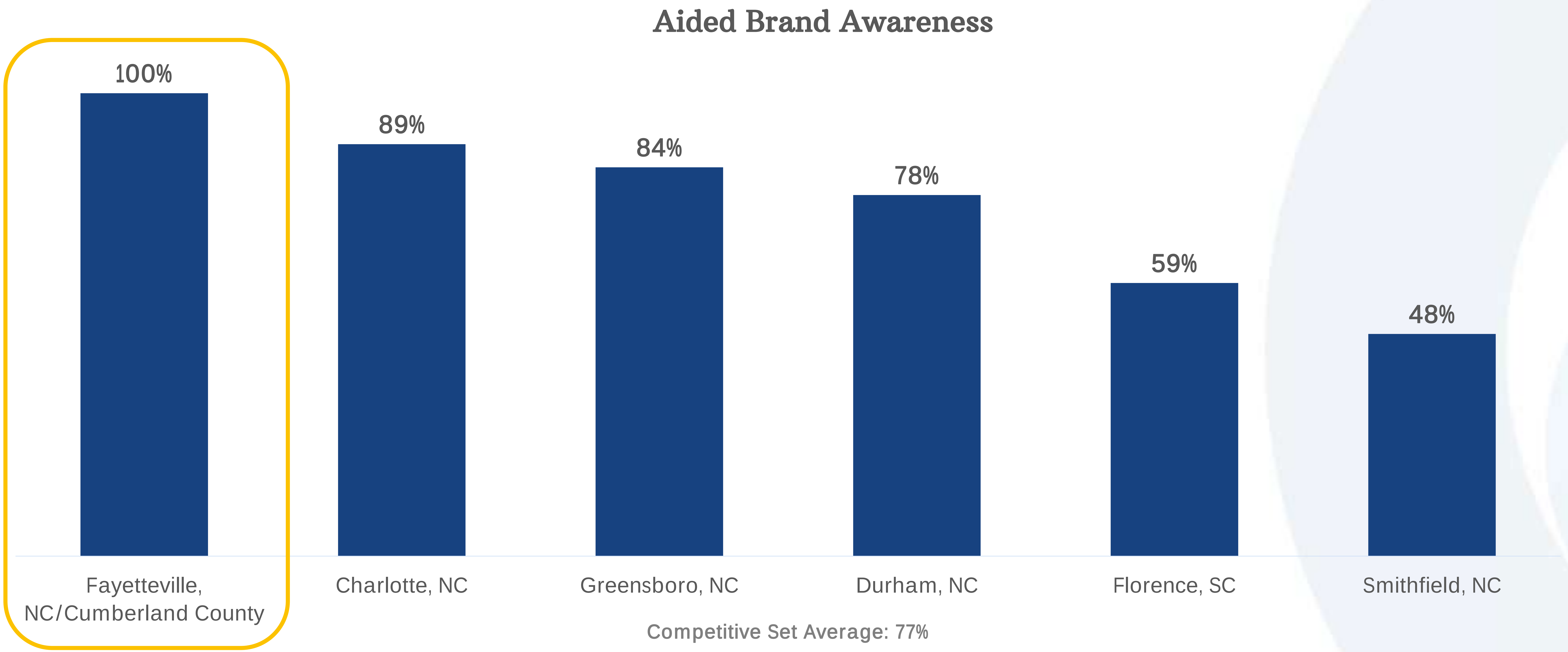
Fayetteville/Cumberland County is not a top-of-mind travel destination. Its level of unaided brand awareness is comparatively low, indicating it is not in most travelers’ consideration sets.

Top-of-Mind Attractions		First Mention	Any Mention
1.	Myrtle Beach	12.6%	19.8%
2.	Florida	14.6%	14.6%
3.	Beach	5.1%	7.3%
4.	Charlotte	1.8%	5.9%
5.	Mountains	1.5%	5.5%
6.	Carolina Beach	1.9%	5.3%
7.	Asheville	1.8%	4.8%
8.	New York	2.0%	4.6%
9.	Virginia Beach	1.9%	4.5%
10.	Charleston	1.5%	4.4%
27.	Greensboro	0.0%	0.4%
27.	Fayetteville	0.1%	0.3%
28.	Florence	0.0%	0.1%
29T.	Durham and Smithfield	0.0%	0.0%
	Competitive Set Average:	0.3%	1.1%

Q6: When you think of overnight or weekend getaways within driving distance of home (300 miles), which destinations first come to mind?

RESPONDENT BASE: ALL RESPONDENTS | N=800

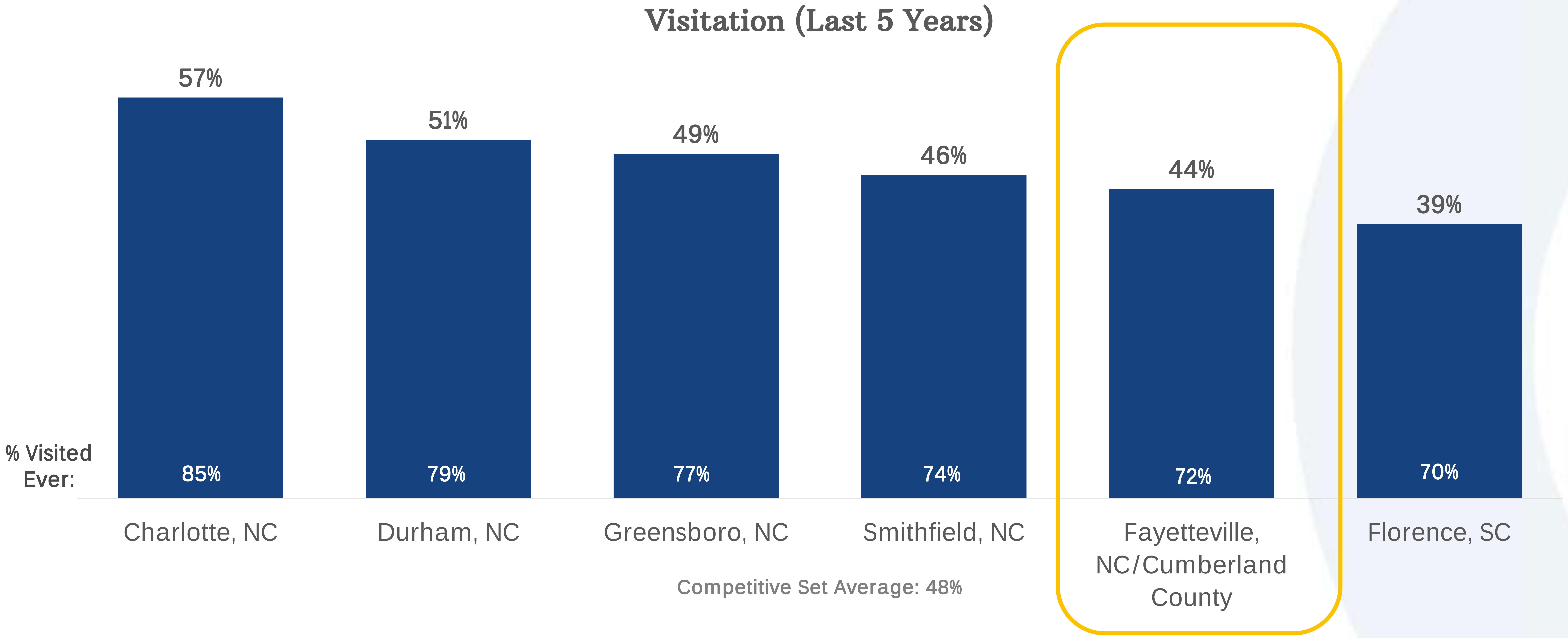
All travelers were required to be familiar with Fayetteville/Cumberland County. Most are also familiar with Charlotte and Greensboro.



Q8: Please indicate your awareness and prior visitation to each of the following regional destinations.

RESPONDENT BASE: ALL RESPONDENTS | N=800

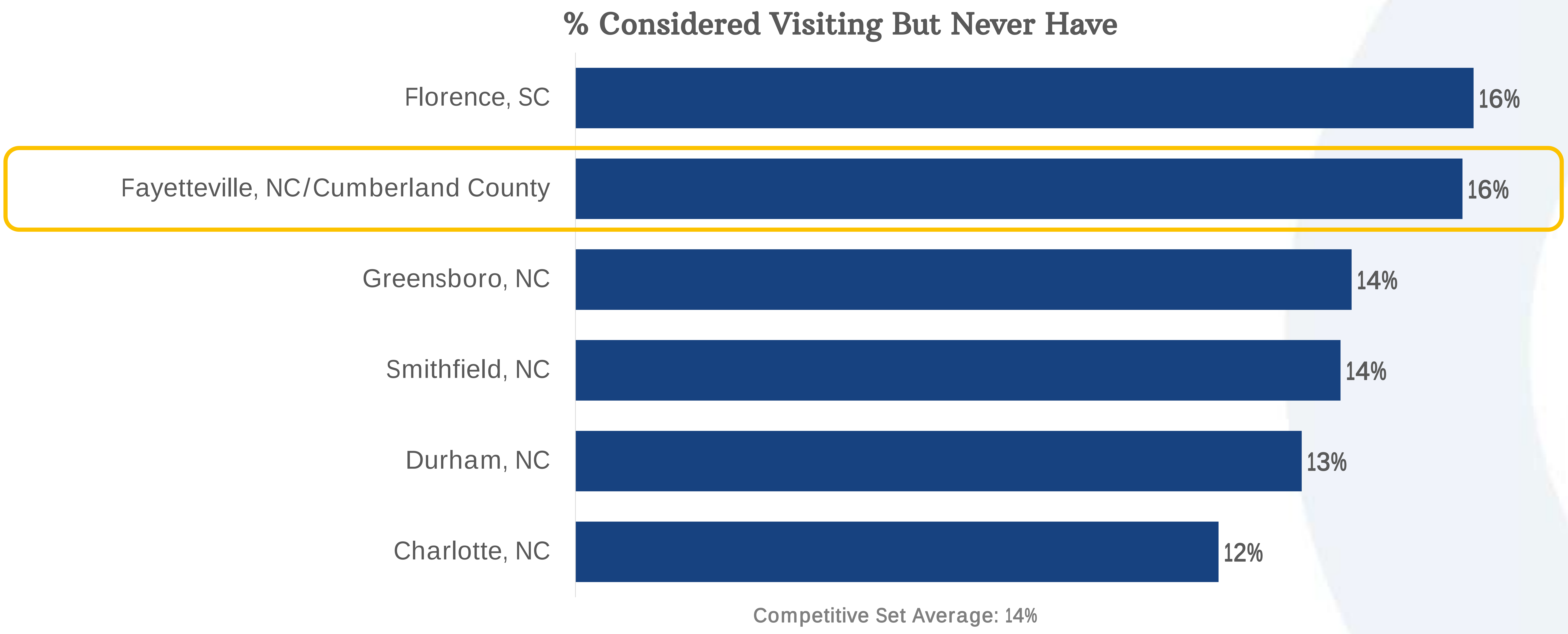
Nearly half (44%) of those familiar with Fayetteville/Cumberland County have visited the community in the past 5 years, ranking fifth among comparable destinations (48% average).



Q8: Please indicate your awareness and prior visitation to each of the following regional destinations.

RESPONDENT BASE: RESPONDENTS FAMILIAR WITH EACH DESTINATION | N= VARIES BY DESTINATION

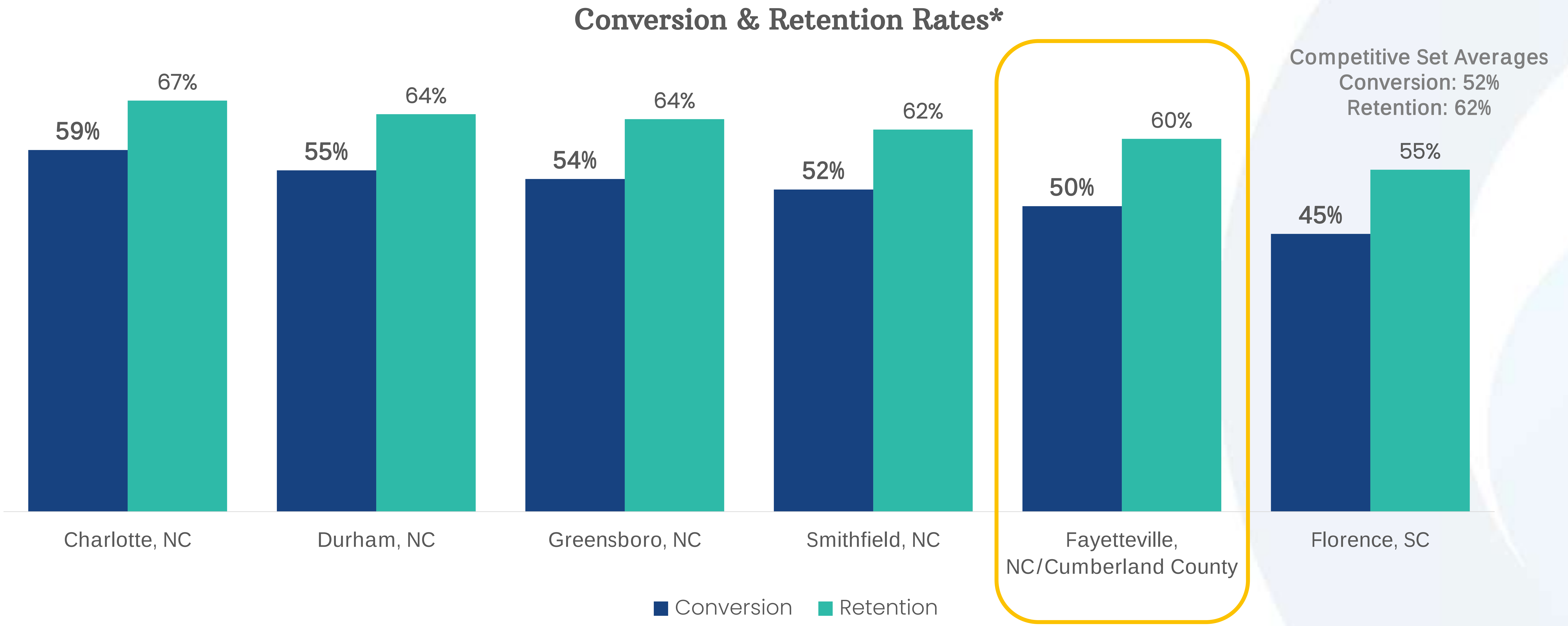
Fayetteville/Cumberland County has a comparably large consideration set of prospects who have considered visiting Fayetteville/Cumberland County in the past but have not yet done so. The comp set average is 14%.



Q8: Please indicate your awareness and prior visitation to each of the following regional destinations.

RESPONDENT BASE: RESPONDENTS FAMILIAR WITH EACH DESTINATION | N= VARIES BY DESTINATION

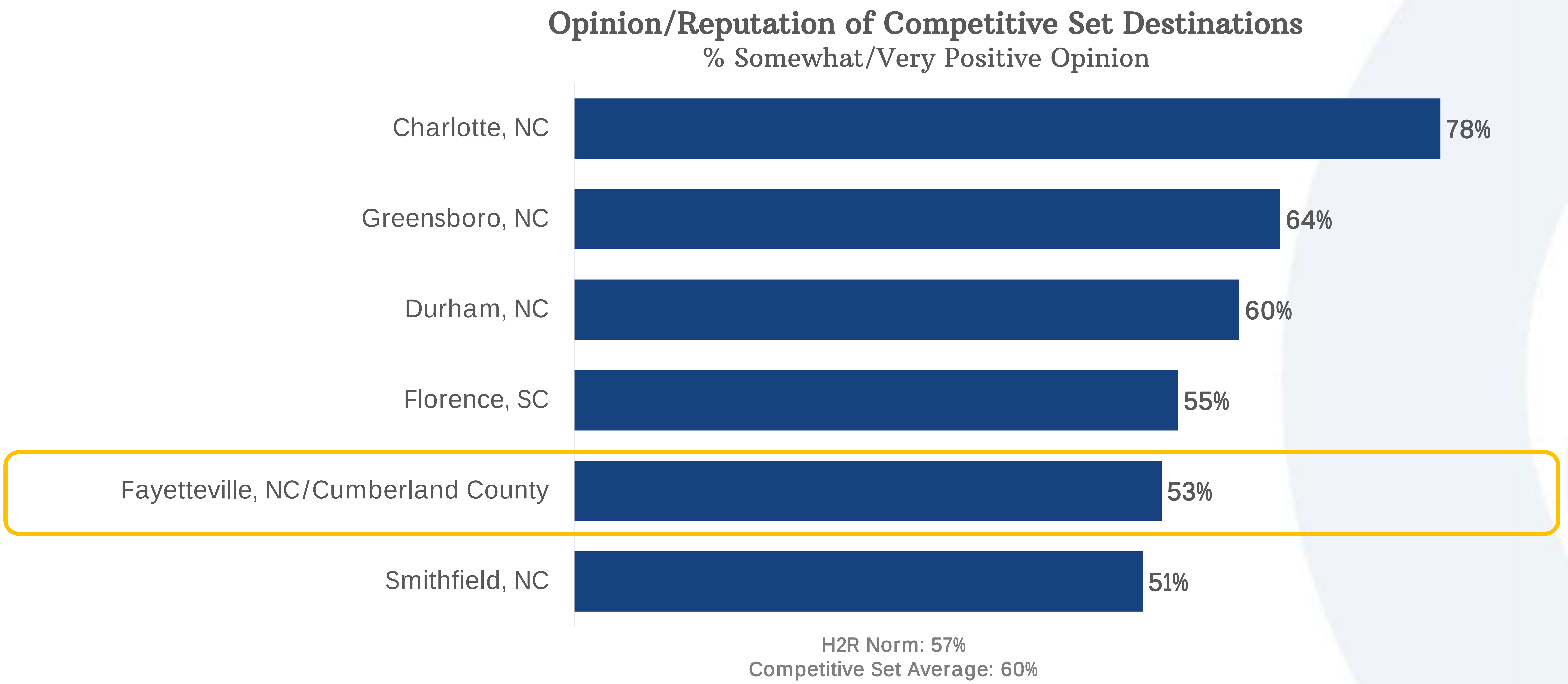
Fayetteville/Cumberland County's conversion and retention rates fall below average due to a lower ratio of recent visitors compared to the other destinations.



Q8: Please indicate your awareness and prior visitation to each of the following regional destinations.
*Conversion Rate=Recent Visitors ÷ (Considerers + Visitors Ever)
Retention Rate=Recent Visitors ÷ Visitors Ever

RESPONDENT BASE: RESPONDENTS FAMILIAR WITH EACH DESTINATION | N= VARIES BY DESTINATION

While Fayetteville/Cumberland County's reputation is reasonably good, it trails the average from both the competitive set and H2R's Norm.



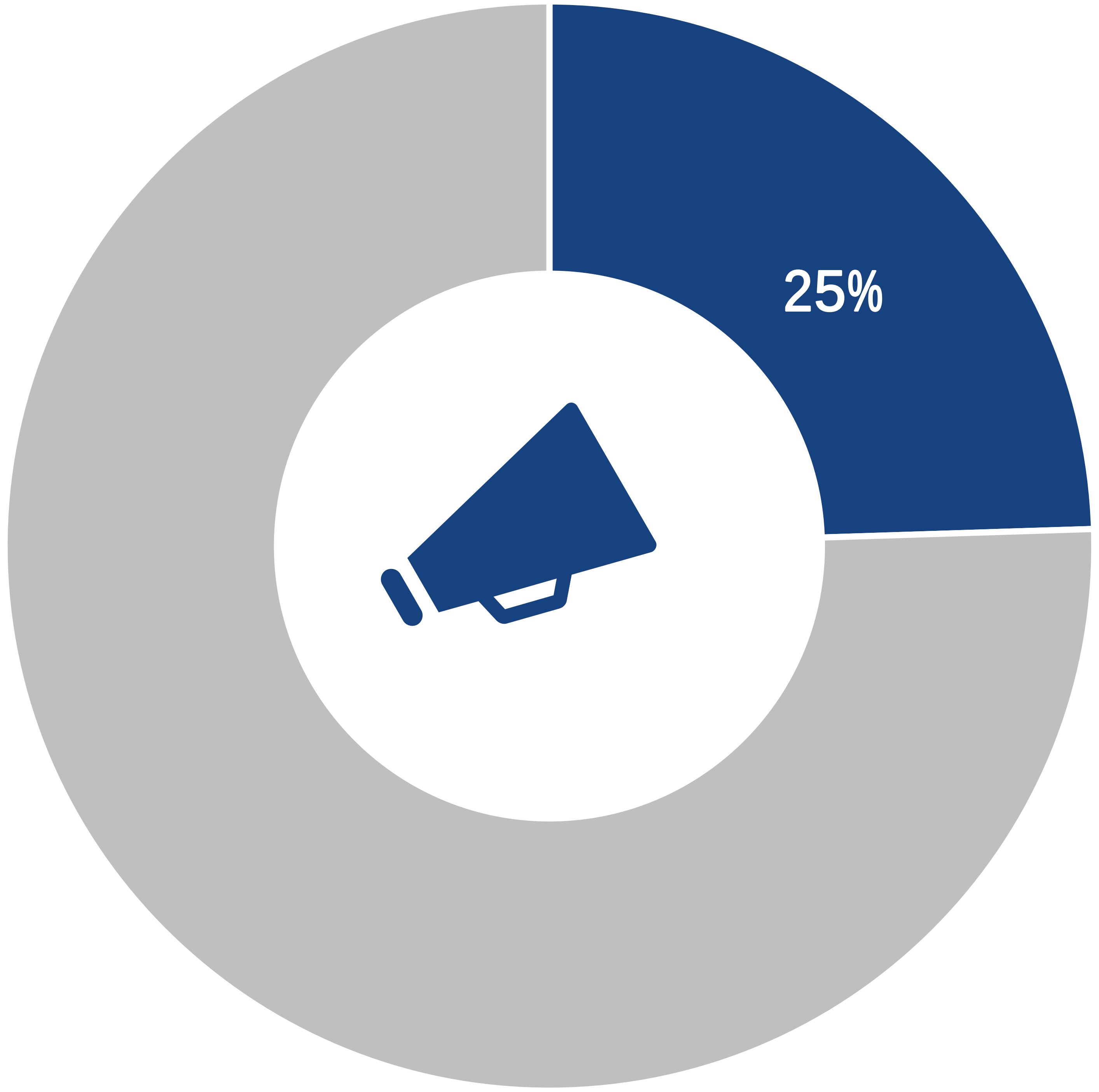
Q15: Please indicate to what degree your opinion of these destinations is positive or negative.

RESPONDENT BASE: RESPONDENTS FAMILIAR WITH EACH DESTINATION | N= VARIES BY DESTINATION

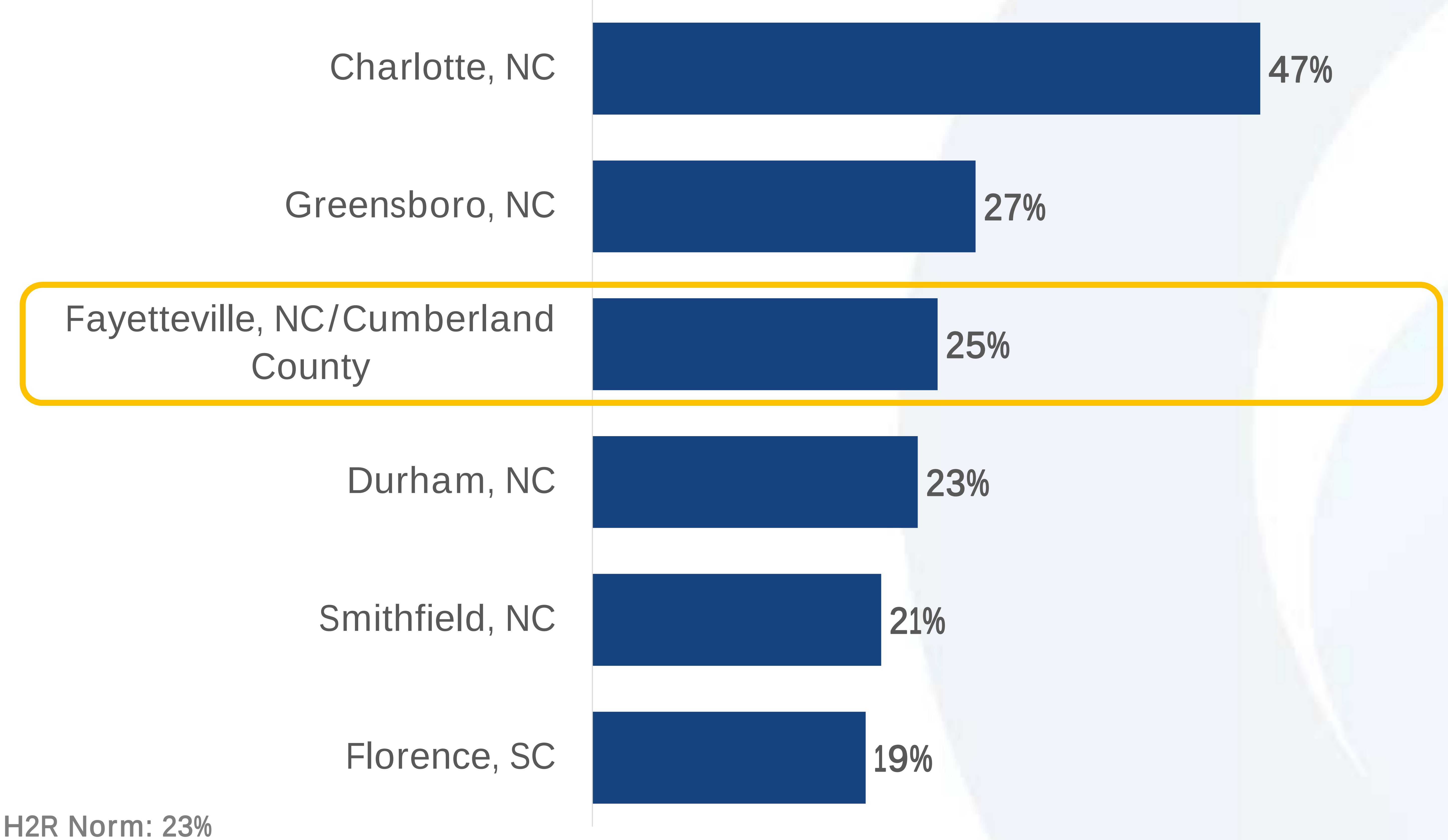
Fayetteville/Cumberland County's share of voice (assisted ad awareness) averages 25% which is slightly lower than the comp set's average of 27% yet slightly higher than H2R's Norm (23%).

Fayetteville/Cumberland County Share of Voice

% Seen/Heard Destination Ads



Competitive Destinations



H2R Norm: 23%
Competitive Set Average: 27%

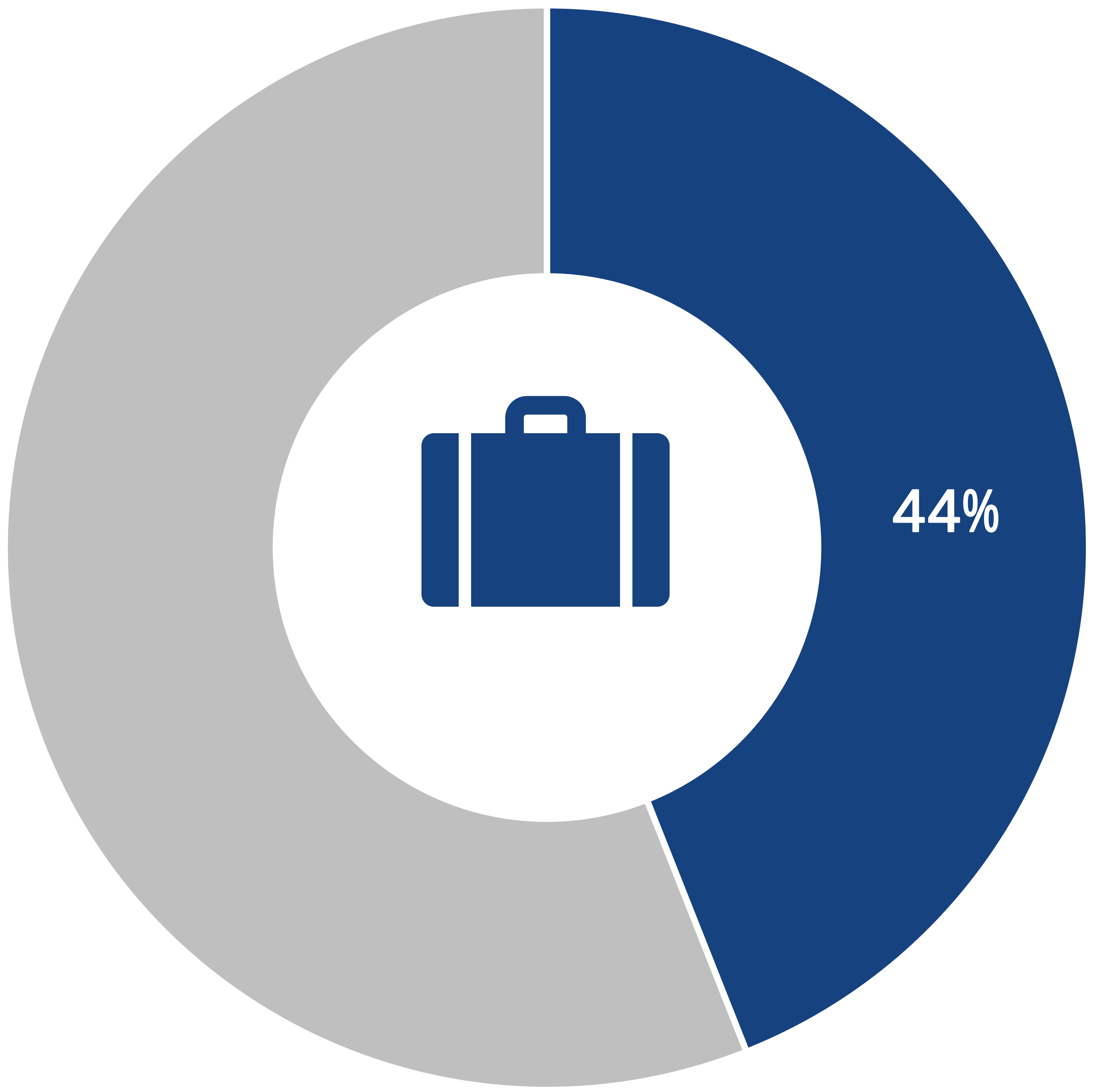
Q16: Which of the following destinations have you seen advertising for in the past 6 months?

RESPONDENT BASE: RESPONDENTS FAMILIAR WITH EACH DESTINATION | N= VARIES BY DESTINATION

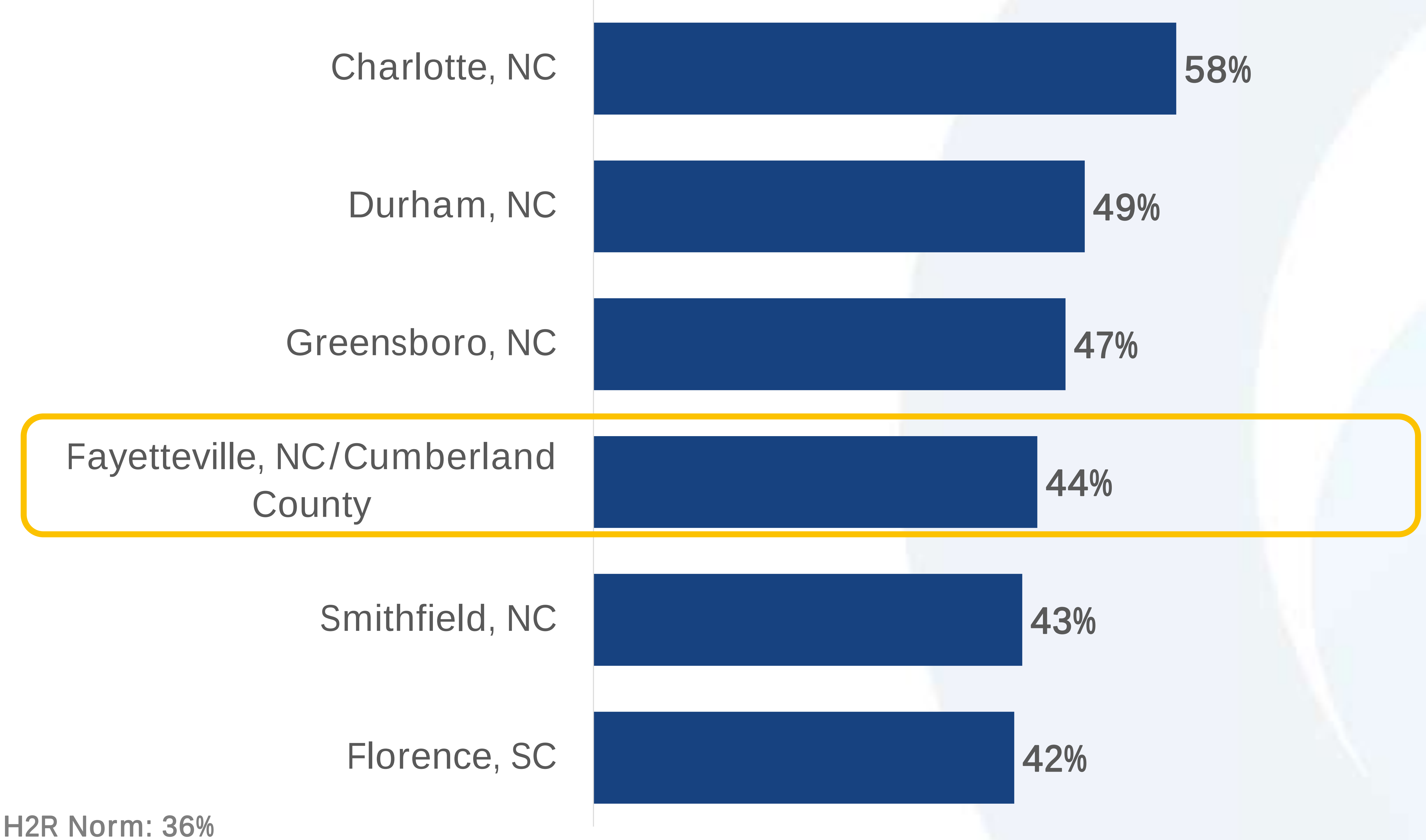
Intent to visit Fayetteville/Cumberland County (44%) is also slightly lower than average among the destinations in the competitive set (47%), but higher than H2R's Norm.

Intent to Visit Fayetteville/Cumberland County

% Probably/Definitely Will Visit



Competitive Destinations



H2R Norm: 36%
Competitive Set Average: 47%

Q17: Please indicate how likely you are to visit each of the following destinations in the next 12 months.

RESPONDENT BASE: RESPONDENTS FAMILIAR WITH EACH DESTINATION | N= VARIES BY DESTINATION

Fayetteville's overarching brand health is in line with the comp set average across some metrics but falls below in reputation and intent.

Brand Health Summary	Fayetteville, NC/Cumberland County	Charlotte, NC	Greensboro, NC	Durham, NC	Florence, SC	Smithfield, NC	Comp Set Average
Aided Brand Awareness	100%	89%	84%	78%	59%	48%	77%
Market Share – Past 5 Years	44%	57%	49%	51%	39%	46%	48%
Market Share – Ever Visited	72%	85%	77%	79%	70%	74%	76%
Considered, But Never Visited	16%	12%	14%	13%	16%	14%	14%
Conversion Rate	50%	59%	54%	55%	45%	52%	52%
Retention Rate	60%	67%	64%	64%	55%	62%	62%
Positive Opinion (Reputation)	53%	78%	64%	60%	55%	51%	60%
Share of Voice	25%	47%	27%	23%	19%	21%	27%
Intent to Visit	44%	58%	47%	49%	42%	43%	47%

RESPONDENT BASE: RESPONDENTS FAMILIAR WITH EACH DESTINATION | N= VARIES BY DESTINATION

Brand Health Summary Among Residents vs. Tourists

Not surprisingly, residents who live within 50 miles of Fayetteville/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/Cumberland County than residents.

	Overall	Residents (0-50 Miles)	Tourists (51+ Miles)
Aided Brand Awareness	100%	100%	100%
Market Share – Past 5 Years	44%	69%	38%
Market Share – Ever Visited	72%	82%	70%
Considered, But Never Visited	16%	9%	18%
Conversion Rate	50%	76%	44%
Retention Rate	60%	84%	55%
Positive Opinion (Reputation)	53%	46%	55%
Share of Voice	25%	43%	21%
Intent to Visit	44%	68%	39%

RESPONDENT BASE: ALL RESPONDENTS | N=800; RESIDENTS | N=139; TOURISTS | N=661

Fayetteville/Cumberland County is viewed as a nice, historic military town. It is also considered fun, friendly, beautiful and interesting. But once again, it is not currently viewed as a compelling tourist destination.

Q19: Using one word or short phrase, how would you describe Fayetteville, NC/Cumberland County to a friend or family member who was not familiar with it? Please be specific.

RESPONDENT BASE: ALL RESPONDENTS | N=800

Compared to regional destinations of comparable size and scope, Fayetteville/Cumberland County prospects feel area is most differentiated by Patriotism and to a lesser extent Spectator Sports and Museums.

Brand Differentiators	Fayetteville, NC/Cumberland County	Charlotte, NC	Greensboro, NC	Durham, NC	Florence, SC	Smithfield, NC	Comp Set Average
Charm	79	112	83	95	90	115	95
Inviting Downtown	77	173	138	126	54	25	99
Spectator Sports	99	196	71	142	0	82	98
Museums	86	160	74	122	64	122	105
Patriotism	176	105	120	59	41	107	101

Q18: In your opinion, which of the following destinations has a good reputation for having…? Please select all that apply.

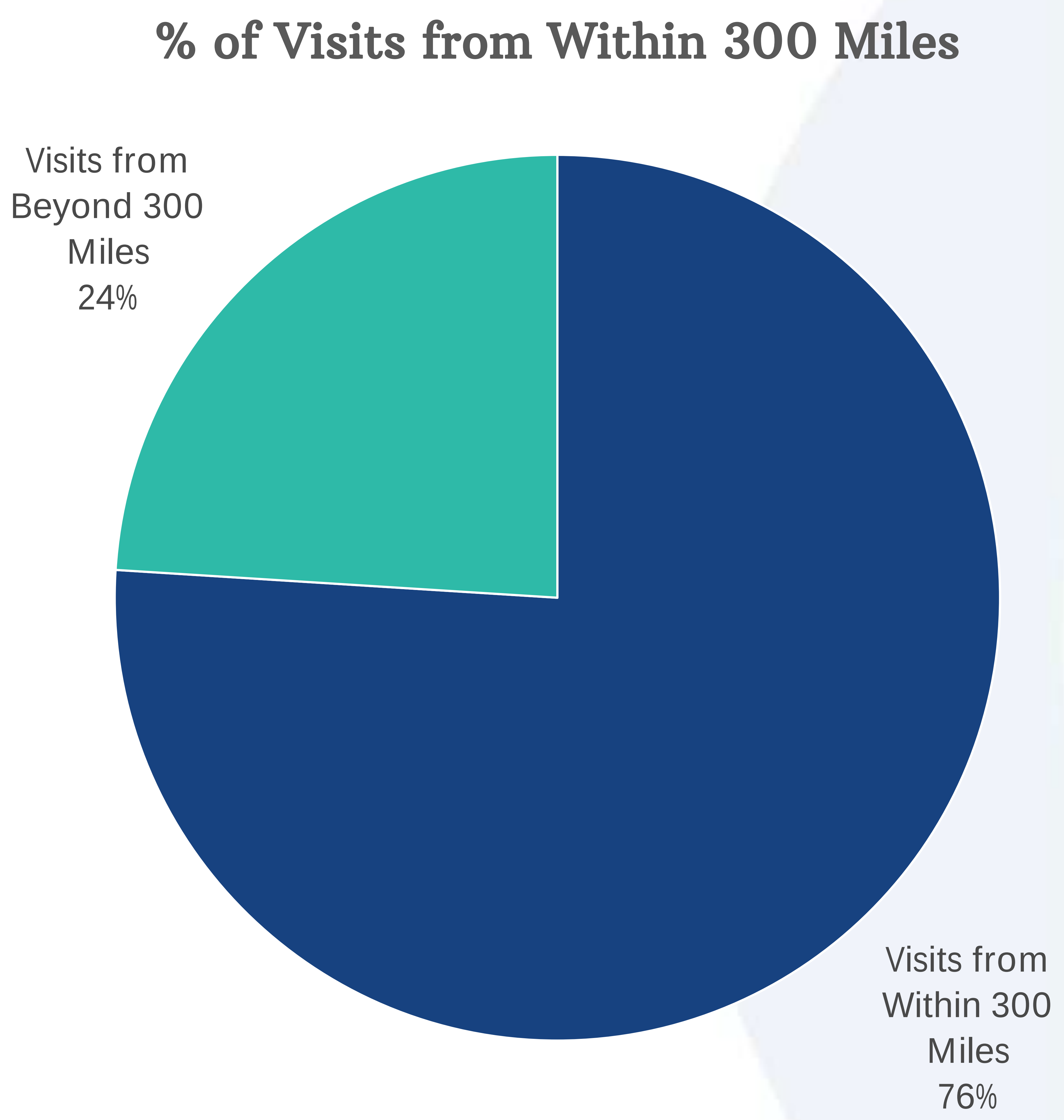
RESPONDENT BASE: RESPONDENTS FAMILIAR WITH EACH DESTINATION | N= VARIES BY DESTINATION

FAYETTEVILLE/CUMBERLAND COUNTY
VISITOR MARKET STUDY

Visitor Profile

A precision geographic distribution (Scout Report) fueled by travelers' cell phone pings pinpointed where Cumberland County's 2019 visitors came from.

- The Cumberland County Scout Report examined nearly 1.3M cell phone pings from travelers whose common daytime and evening locations fell outside of Cumberland County.
- Results revealed a precise percentage of visitors by specific feeder market and distance range. Overall, 76% of Fayetteville's 2019 visitors came from within a 300-mile region.
- This insight was used to inform the trade area radius employed in this market study which interviewed regional travelers across a 300-mile radius.



DMA Report & More: OVERVIEW

LIVE EXAMPLE: [Microsoft Power BI]

H2R Scout Report
Location. Visitation. Intelligence.

Cumberland County, NC

2019 Visitation Trends

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.

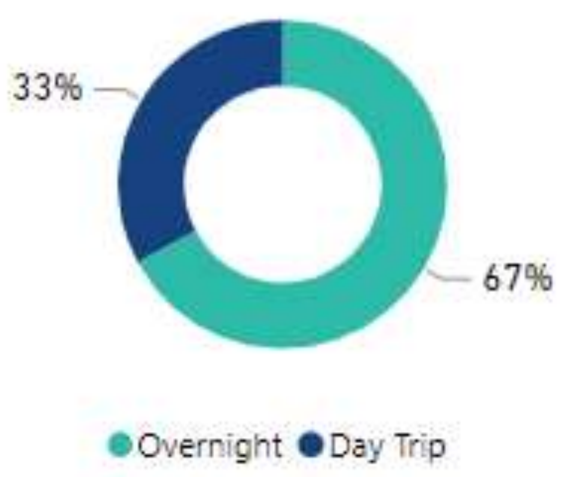
DMA	%	BDI
RALEIGH-DURHAM	45.69%	4,973.90
MYRTLE BEACH-FLORENCE	8.55%	3,521.88
WILMINGTON	3.27%	2,275.72
GREENVILLE-NEW BERN-WASHINGTON	2.17%	856.89
GREENSBORO-HIGH POINT-WINSTON SALEM	2.45%	440.68
CHARLOTTE	3.67%	388.91
SAVANNAH	0.85%	298.84
COLUMBIA, SC	1.36%	292.53
CHARLESTON, SC	0.92%	263.60
AUGUSTA	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
NASHVILLE	0.65%	77.56
Total	**100.00%**	**100.00**

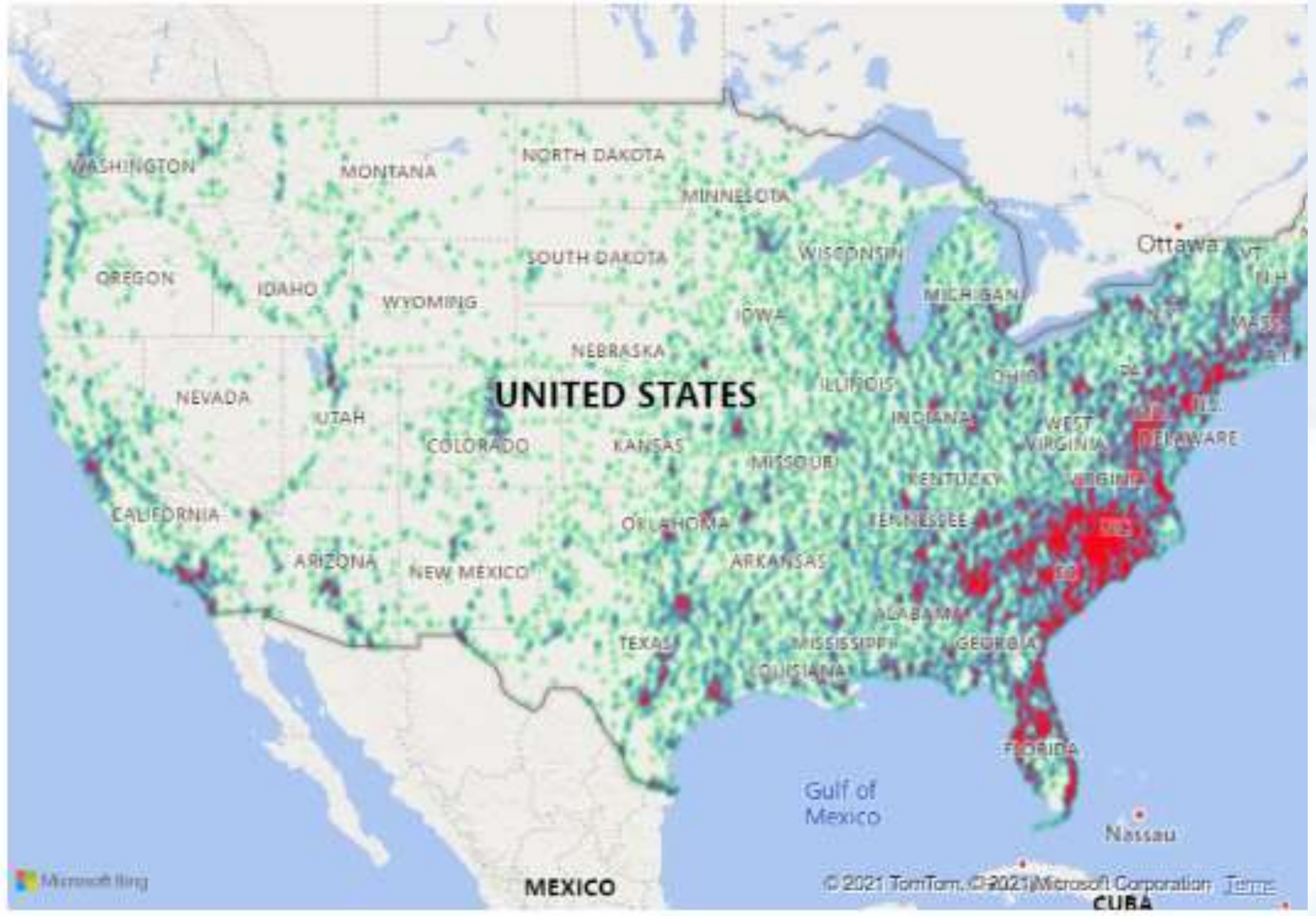
Report prepared by H2R Market Research

Based on 1281485 data points

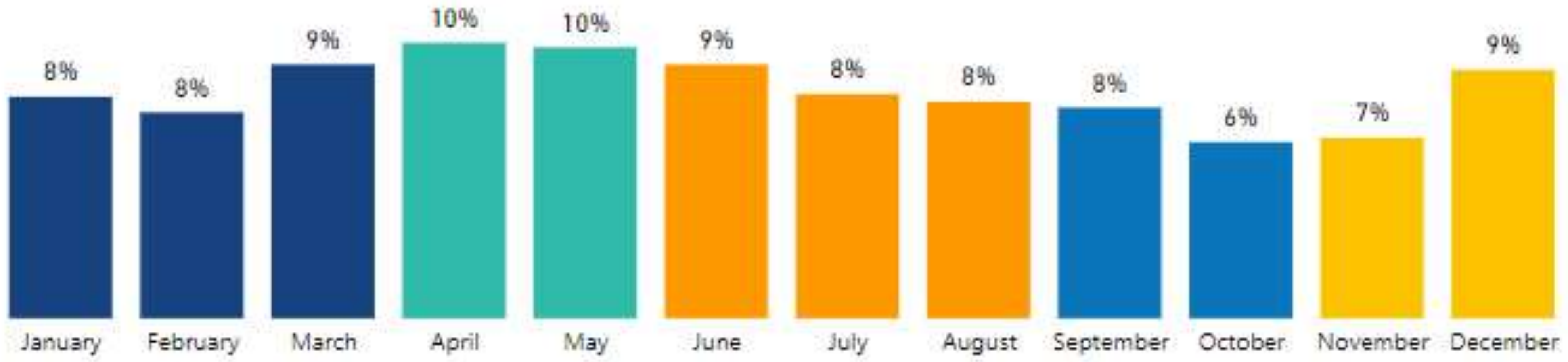
Length of Stay

3.02	2.28
Avg No of Visits	Average LOS (Days)

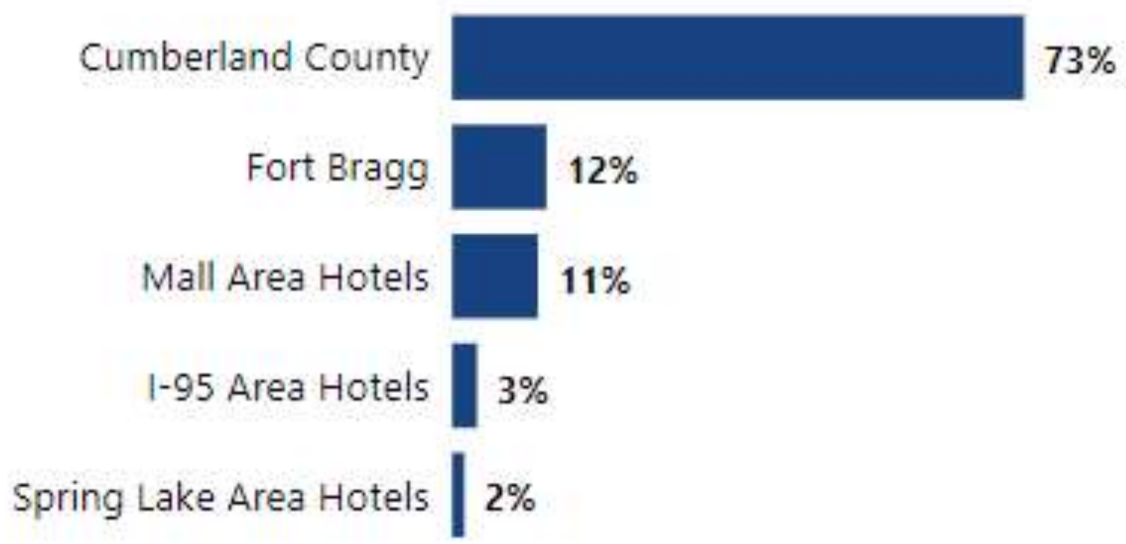




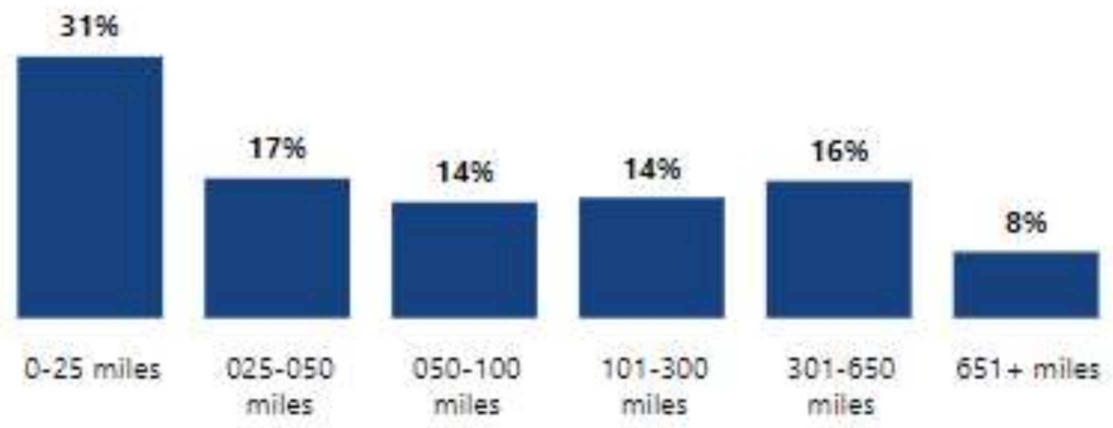
Visitation by Month



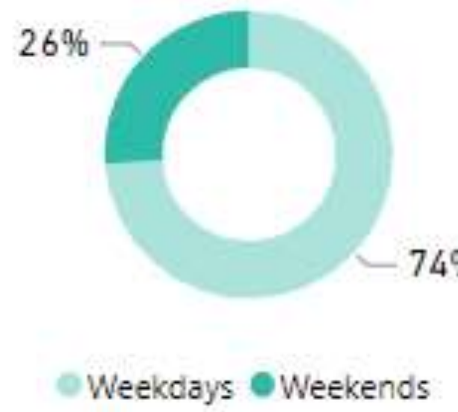
Points of Interest Market Share



Visitation by Distance

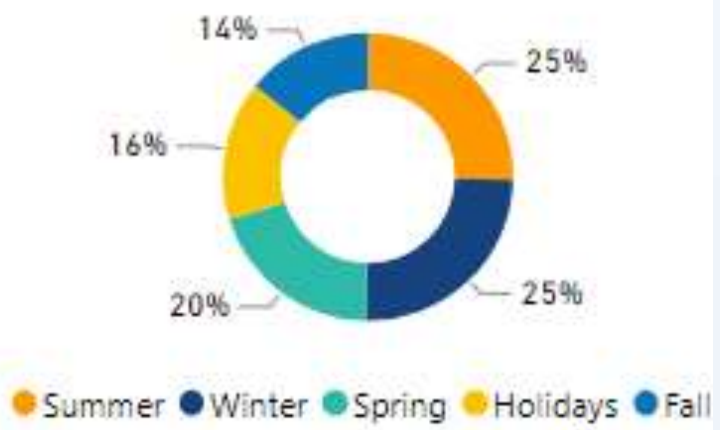


Weekends vs. Weekdays

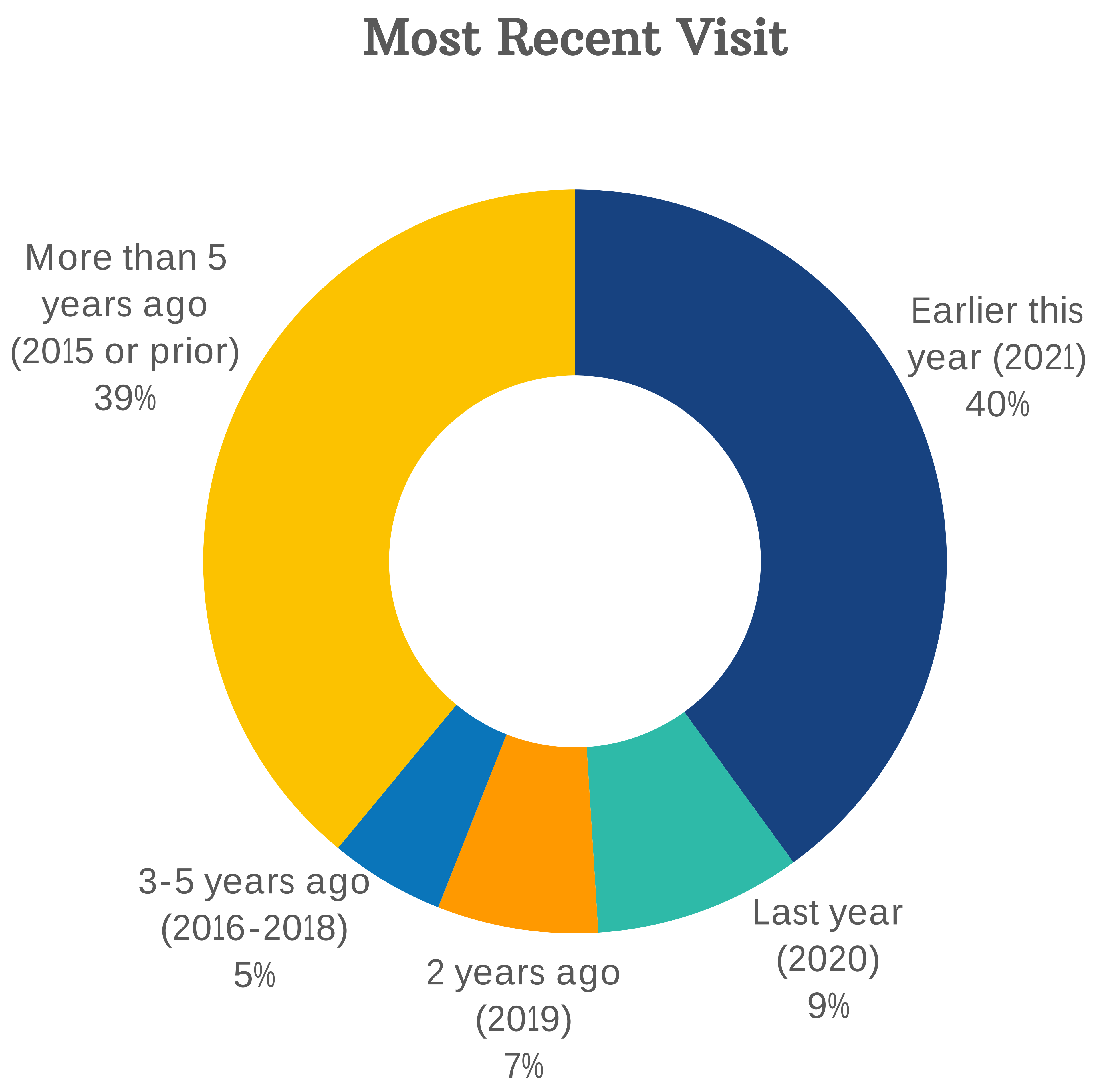


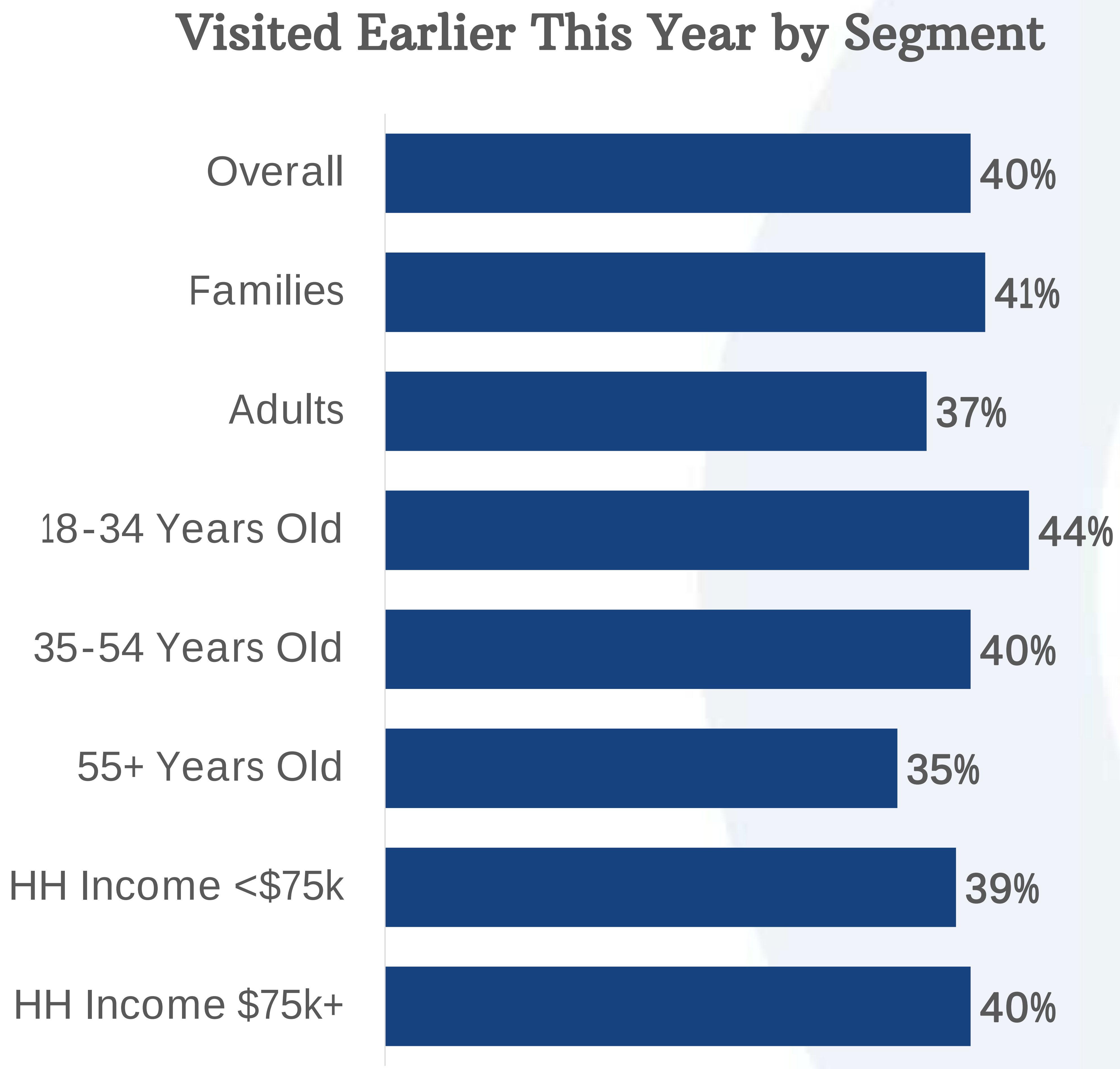
Repeat vs. Single Visits

Visitation by Season



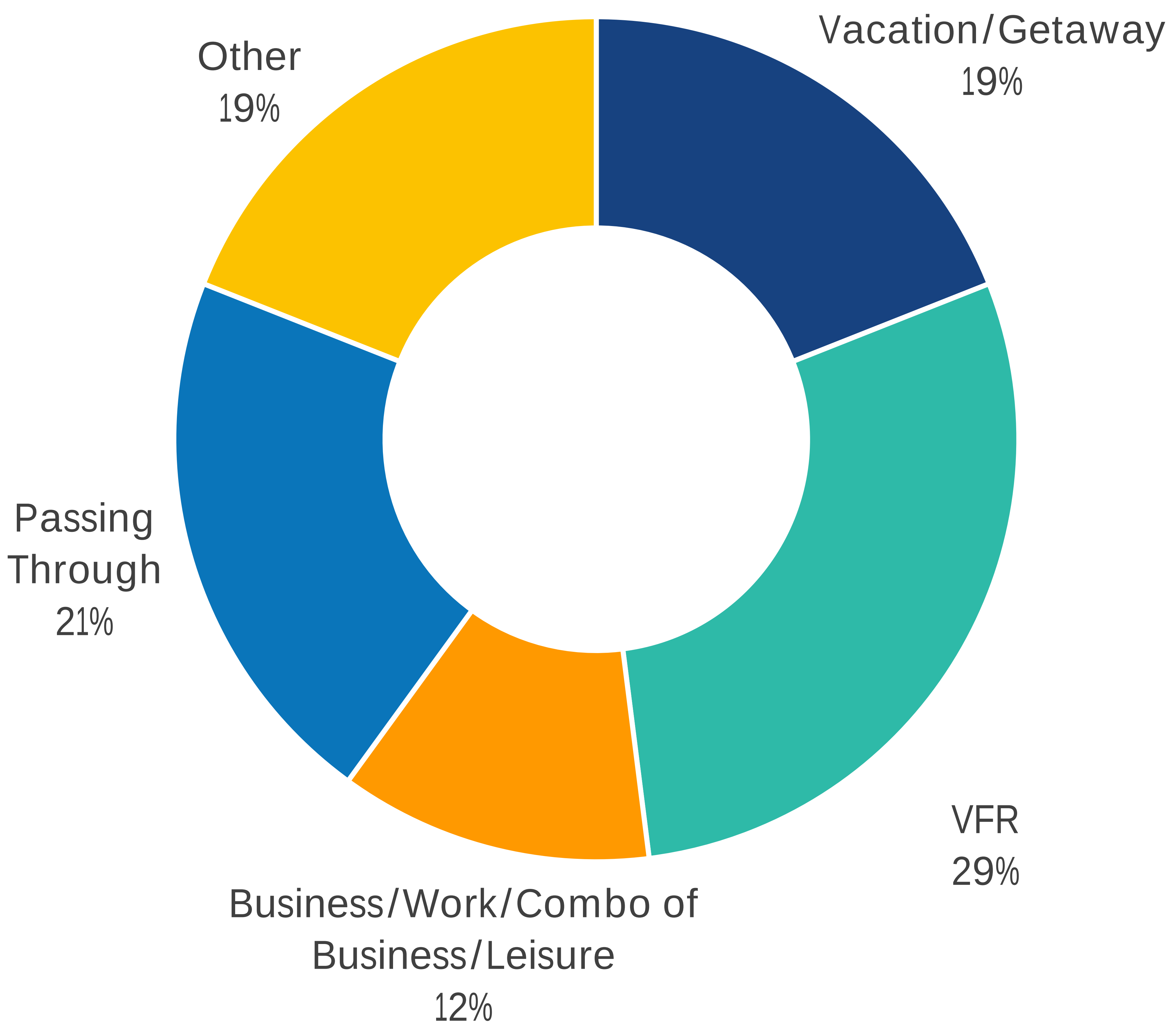
Four in ten visitors indicated that their most recent visit occurred in the past year and young adults were most likely to have visited earlier this year.



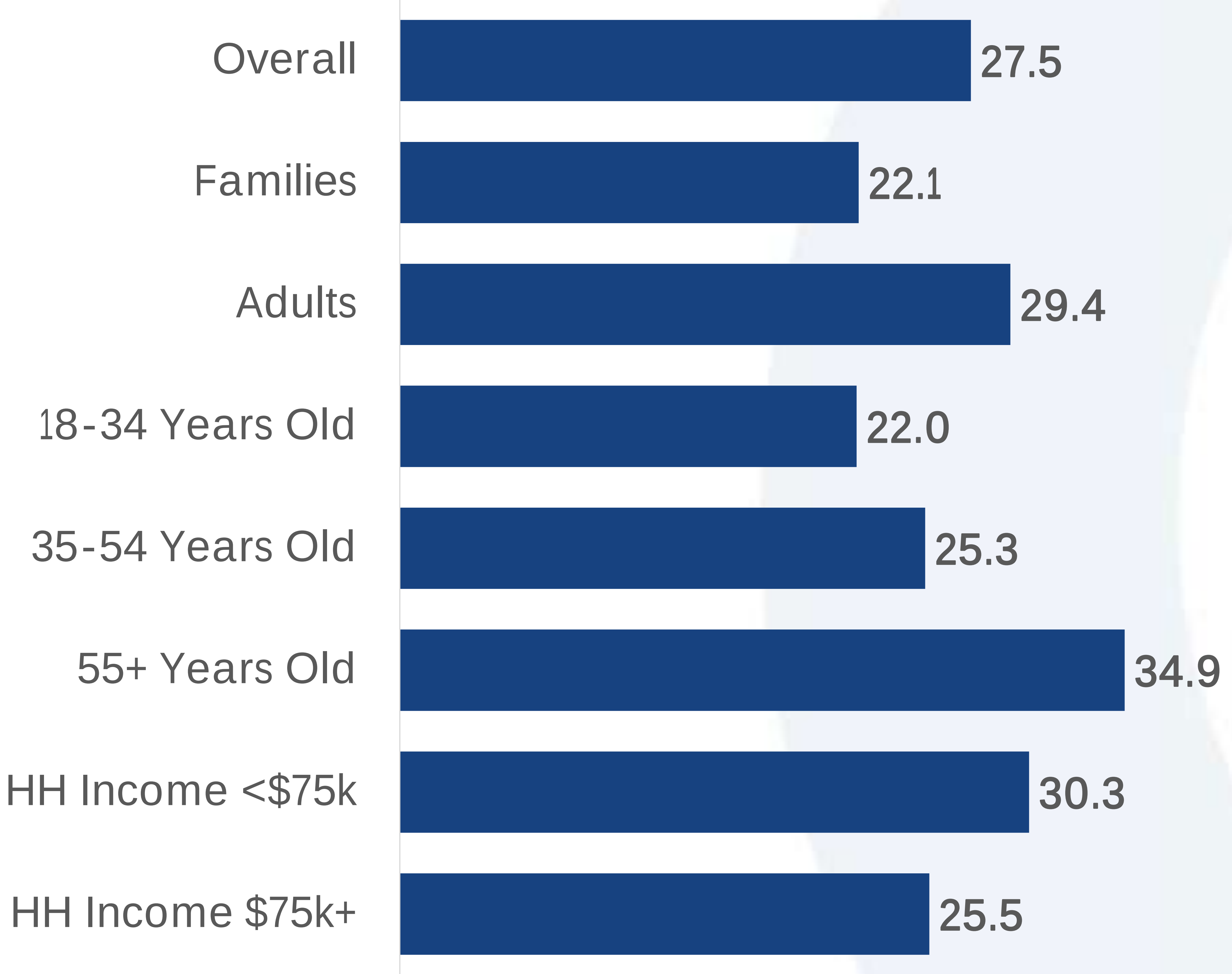


Comparatively few (19%) regional travelers visit Fayetteville/Cumberland County for leisure purposes (vacation or getaway). Conversely, many visit friends/family or VFR (29%) or are just passing through (21%).

Primary Purpose of Visit



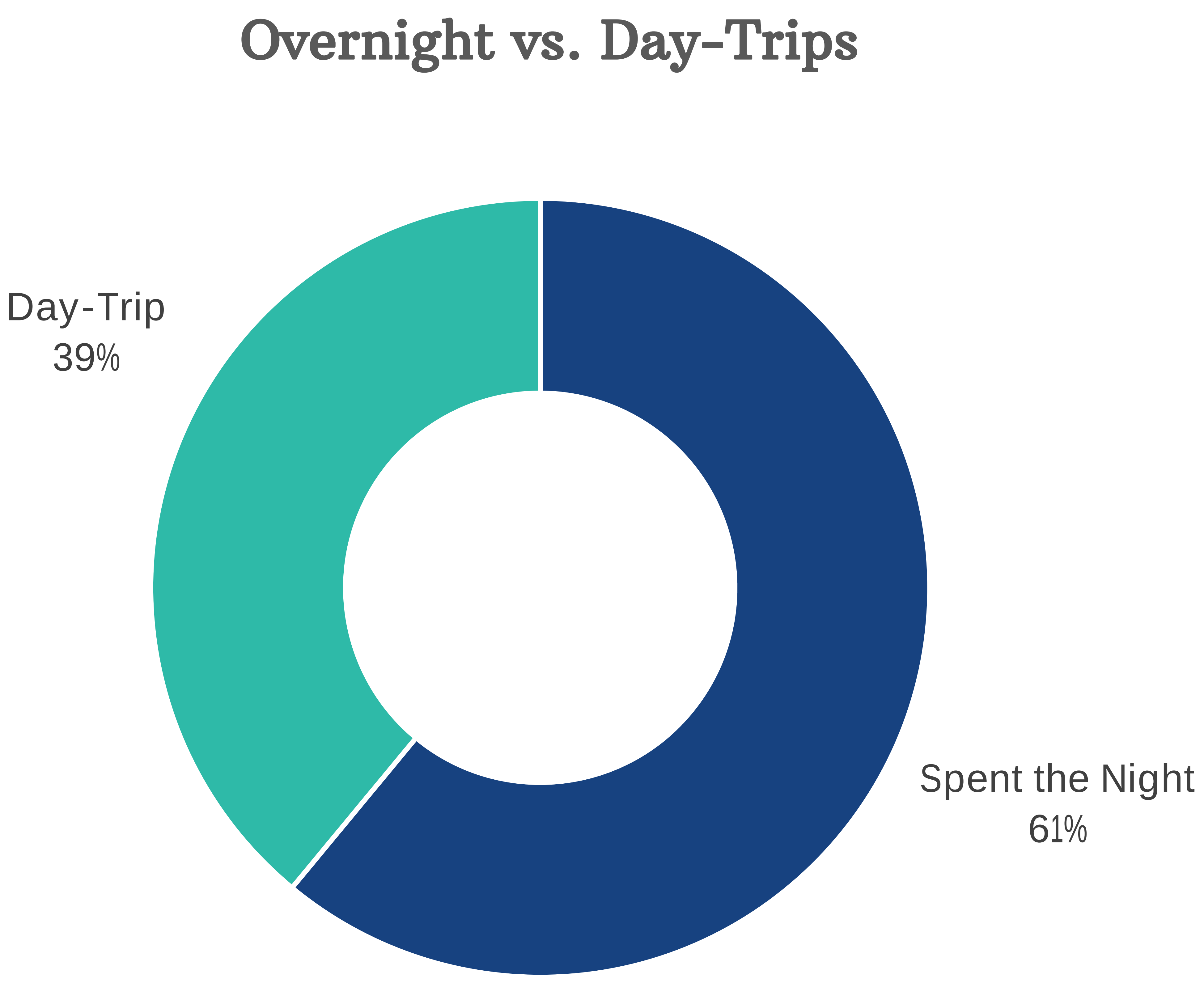
Decision Time (Avg No. of Days Required)



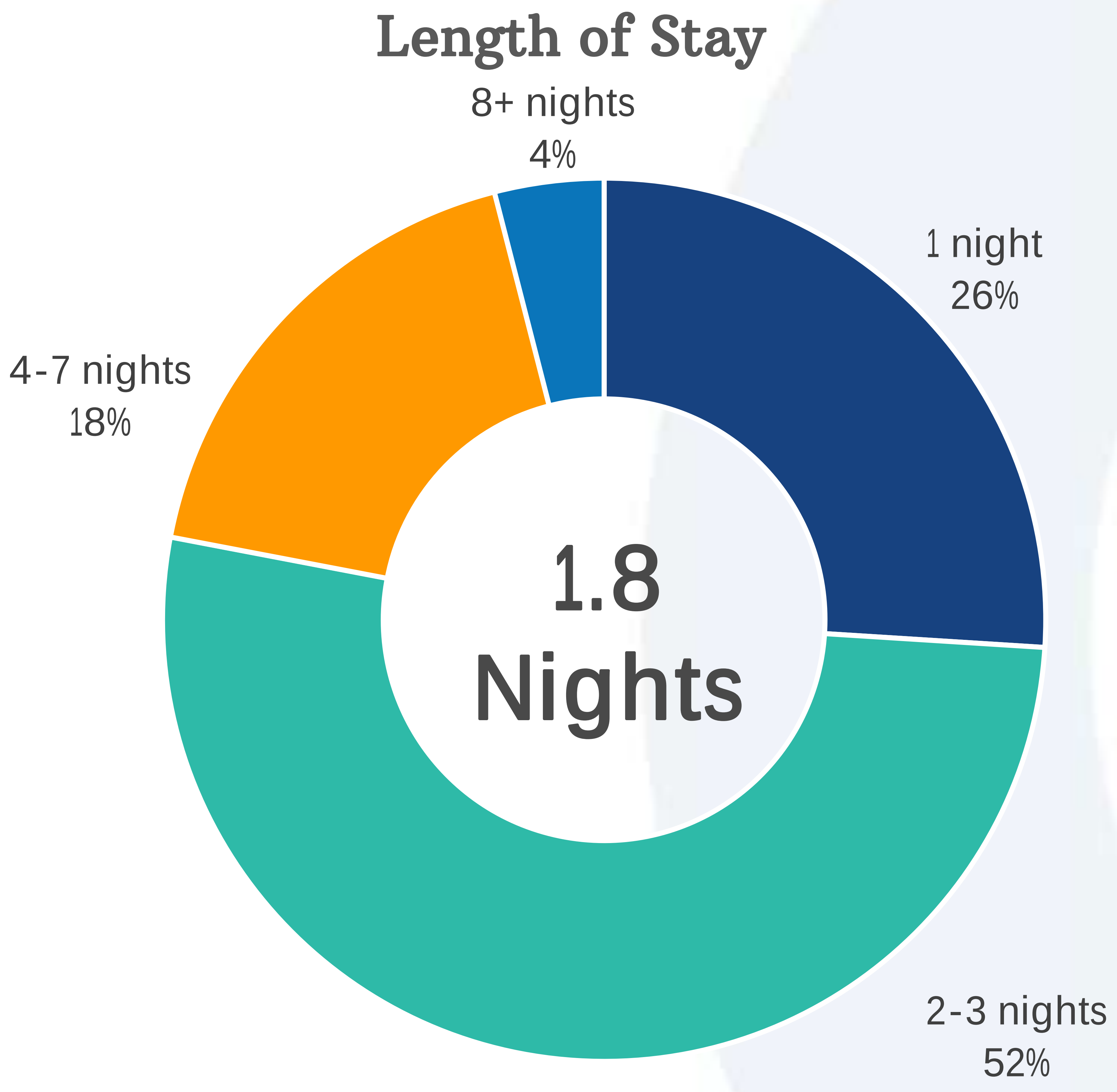
Q24: What was the primary purpose of your most recent visit to Fayetteville, NC/Cumberland County? Please select one. Q25: Thinking about this most recent visit to Fayetteville, NC/Cumberland County, how far in advance did you make your decision to visit?

RESPONDENT BASE: VISITORS | N=579

Most Fayetteville/Cumberland County visitors spent the night on their most recent visit, staying in the area for an average of 1.8 nights.



RESPONDENT BASE: VISITORS | N=579

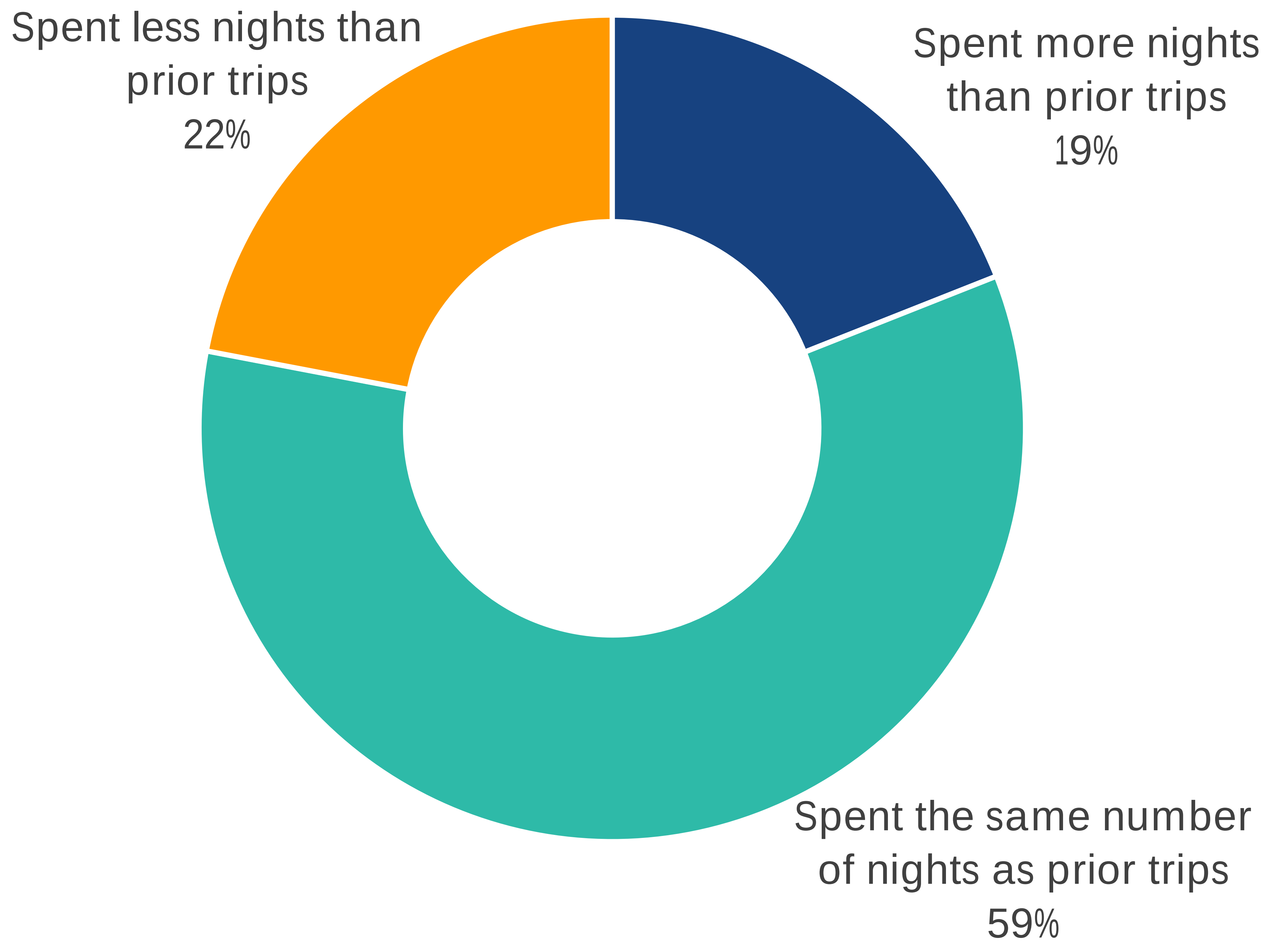


RESPONDENT BASE: VISITORS WHO SPENT THE NIGHT | N=354

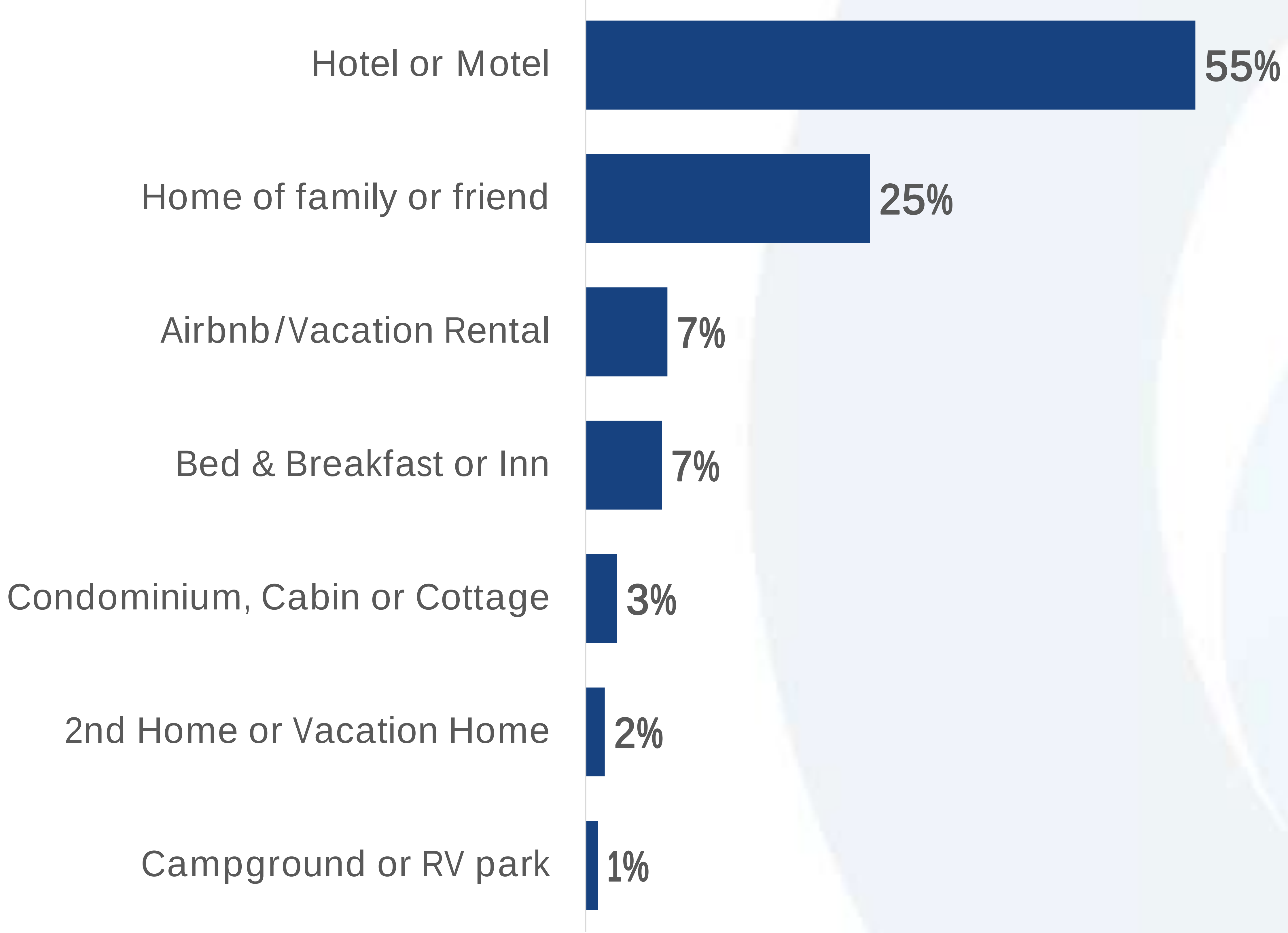
Q30: How many nights did you spend in the Fayetteville, NC/Cumberland County area on your most recent trip?

Compared to prior trips, nearly six in ten overnight visitors say they spent the same number of nights. Most stayed in a hotel or motel.

Nights Spent in Area Compared to Prior Trips



Accommodations



Q31: How does the number nights you spent in the Fayetteville, NC/Cumberland County area compare to prior trips? Q32: Which of the following best describes the type of accommodations you used on your most recent trip to Fayetteville, NC/Cumberland County?

RESPONDENT BASE: VISITORS WHO SPENT THE NIGHT | N=354

Spending is reasonably strong among visitors to the area. The average party reports spending $487 on their last visit, a figure that equates to $201 per person and/or $111 per day. But there is a significant difference in spending per person per day between business ($171), leisure ($109) and VFR ($77) travelers.

Party Trip Spending
$487

Spending per Party by Purpose of Visit

- Leisure $877
- VFR $489
- Business $502
- All Other $297
- Family HH $627
- Adult HH $413
- 18-34 $621
- 35-54 $550
- 55+ $302
- Residents $366
- Tourists $517

Per Person Trip Spending
$201 ($111 per person per day)

Spending per Person and by Person per Day by Purpose

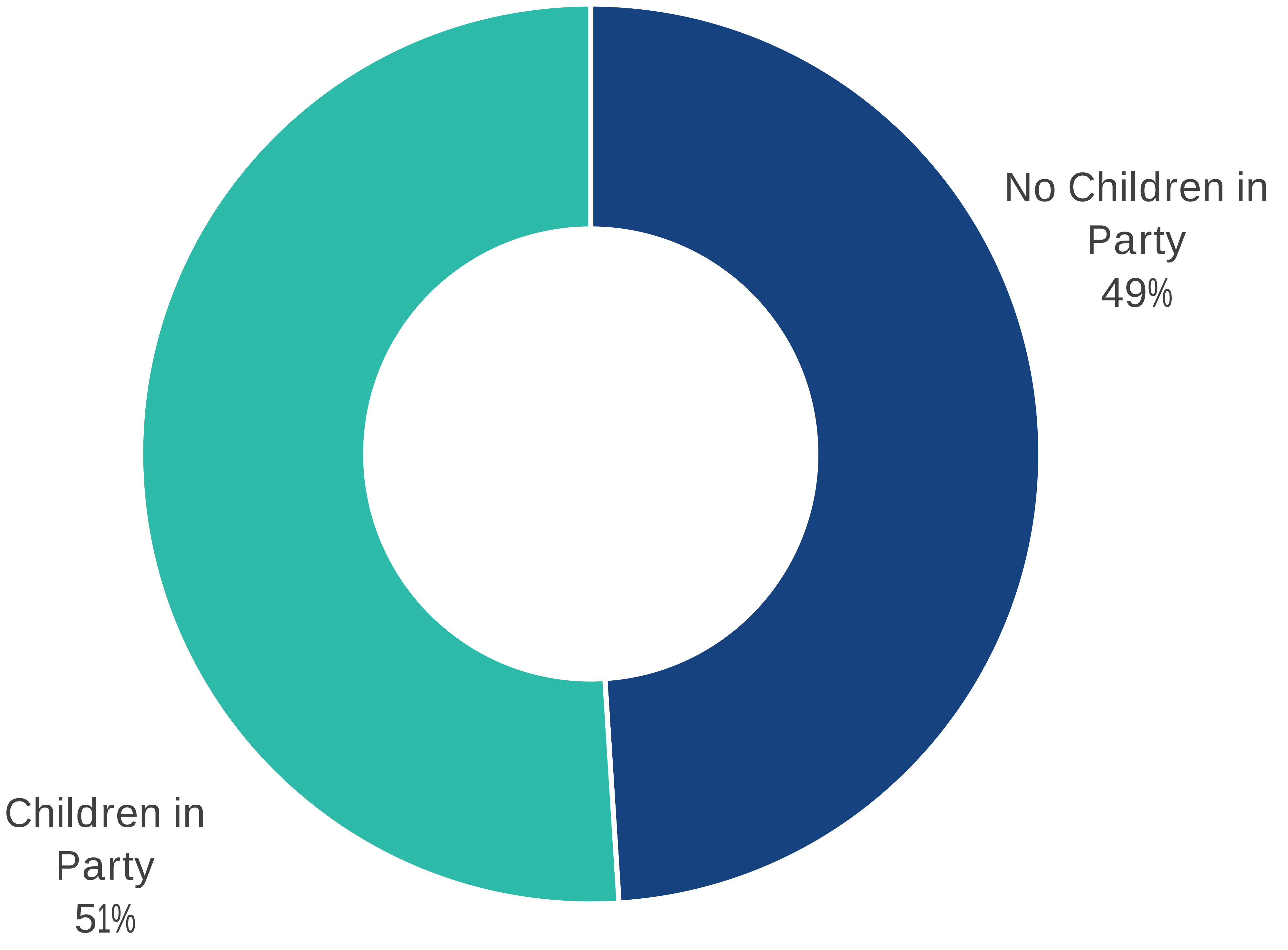
- Leisure $320 $109
- VFR $184 $77
- Business $276 $171
- All Other $130 $142
- Family HH $193 $87
- Adult HH $208 $131
- 18-34 $621 $110
- 35-54 $232 $109
- 55+ $146 $109
- Residents $149 $95
- Tourists $215 $115

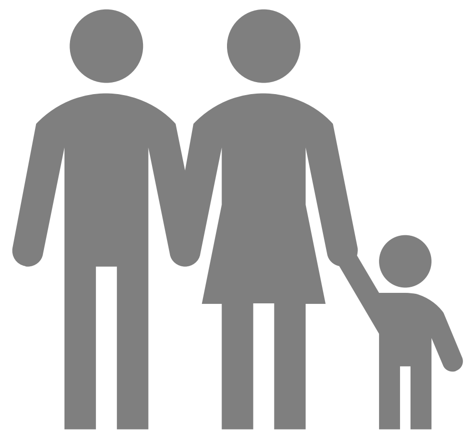
Q33: To better understand the economic impact of tourism, we are interested in finding out the approximate amount of money you and other members of your TRAVEL PARTY spent on your most recent trip to the Fayetteville, NC/Cumberland County area. Please estimate your travel party's total spending for each of the categories listed below and enter the amounts in whole dollars using the boxes provided.

RESPONDENT BASE: VISITORS | N=579

The average recent visitor to Fayetteville/Cumberland County visited with children (51% families), was 43.7 years old and their kids averaged 8.5 years and had an average party size of 2.3.

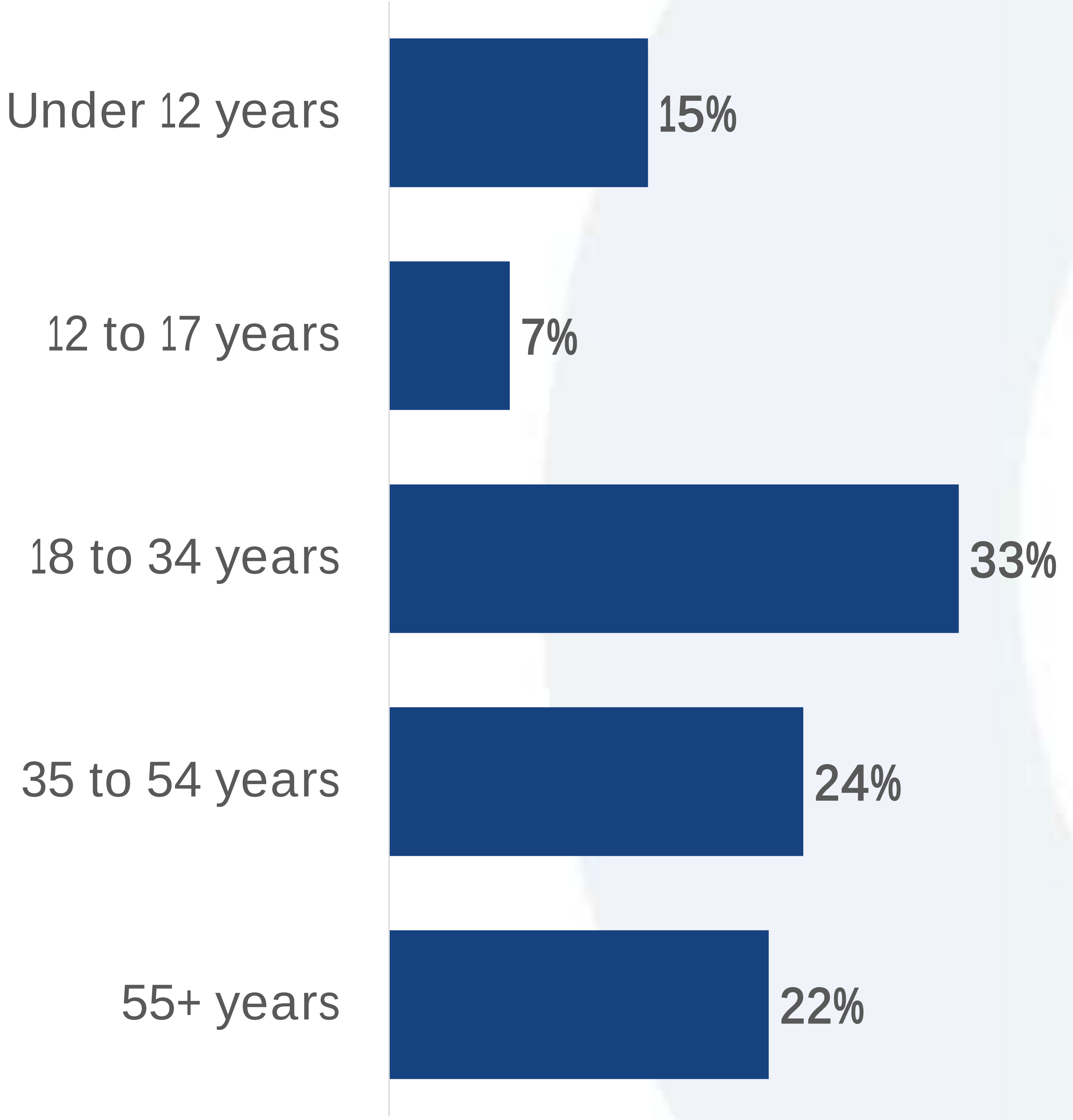
Party Composition





Average adult age: 43.7
Average child age: 8.5
Average party size: 2.3

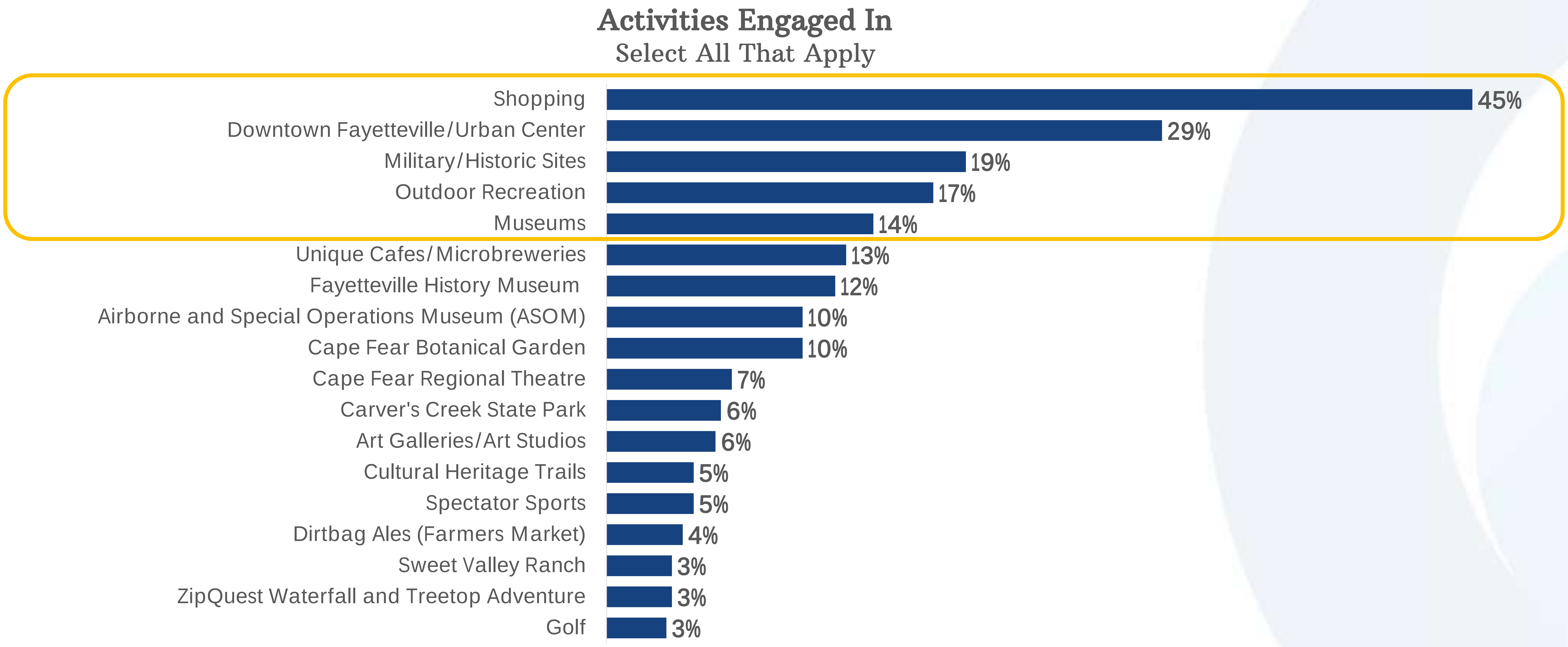
Party Ages



Q29: Including yourself, how many people in your immediate travel party on your Fayetteville, NC/Cumberland County trip fell into the following age categories?

RESPONDENT BASE: RECENT VISITORS | N=350

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



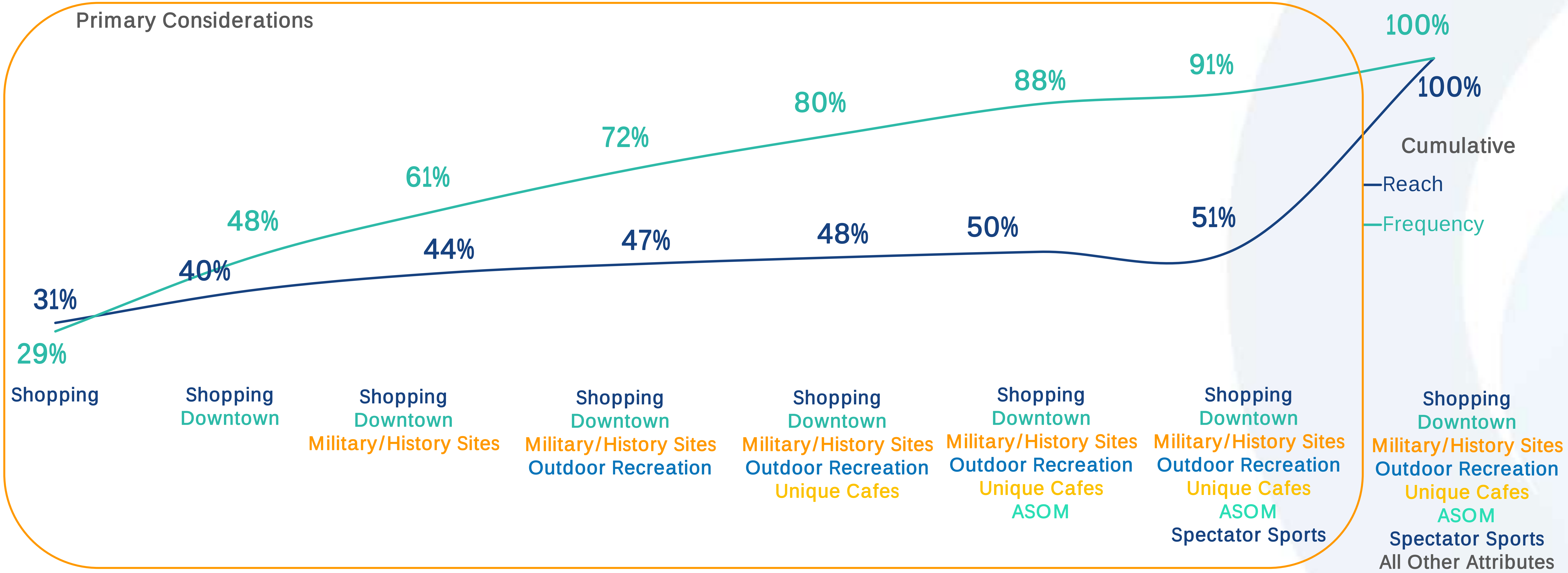
Q26: Which of the following attractions or experiences did you visit/attend on your most recent visit to the Fayetteville, NC/Cumberland County area?

RESPONDENT BASE: RECENT VISITORS | N=350

Fayetteville/Cumberland County's Activity Choice Drivers

TURF* Analysis was once again employed to identify those area activities that deliver the largest number of "total unduplicated recency & frequency" in the Fayetteville/Cumberland County Area. Out of 18 Fayetteville/Cumberland County activities evaluated, the seven that had the largest reach and frequency included Shopping, Downtown/Urban Center, Military/History Sites, Outdoor Recreation, Unique Cafes, ASOM and Spectator Sports—which collectively reached 91% of recent visitors and accounted for 51% of all activities participated in.

Optimal Combination of Activities



Q26: Which of the following attractions or experiences did you visit/attend on your most recent visit to the Fayetteville, NC/Cumberland County area?

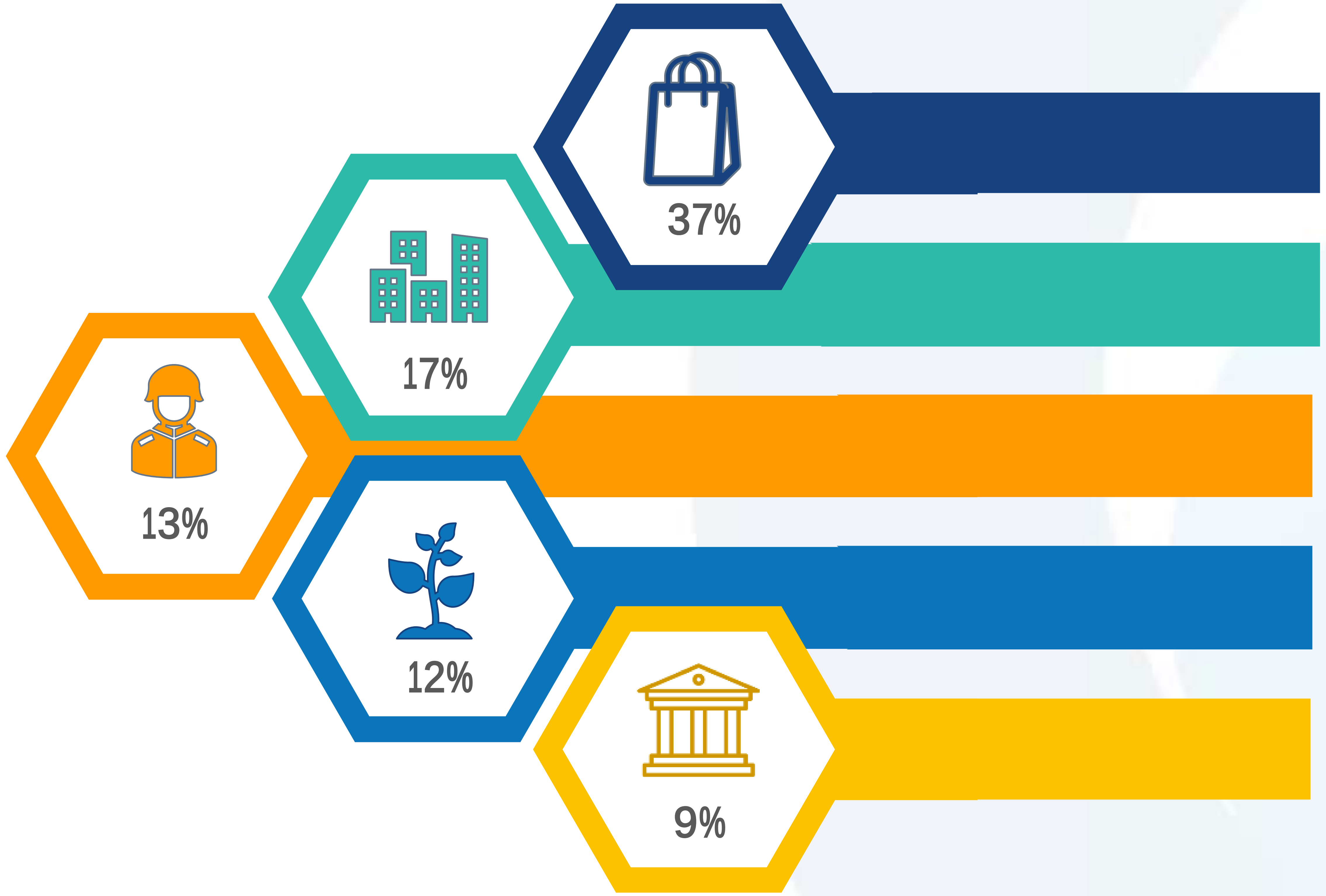
TURF = Total Unduplicated Reach and Frequency

RESPONDENT BASE: RECENT VISITORS | N=350

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

Top Five Functional Drivers of Visitation

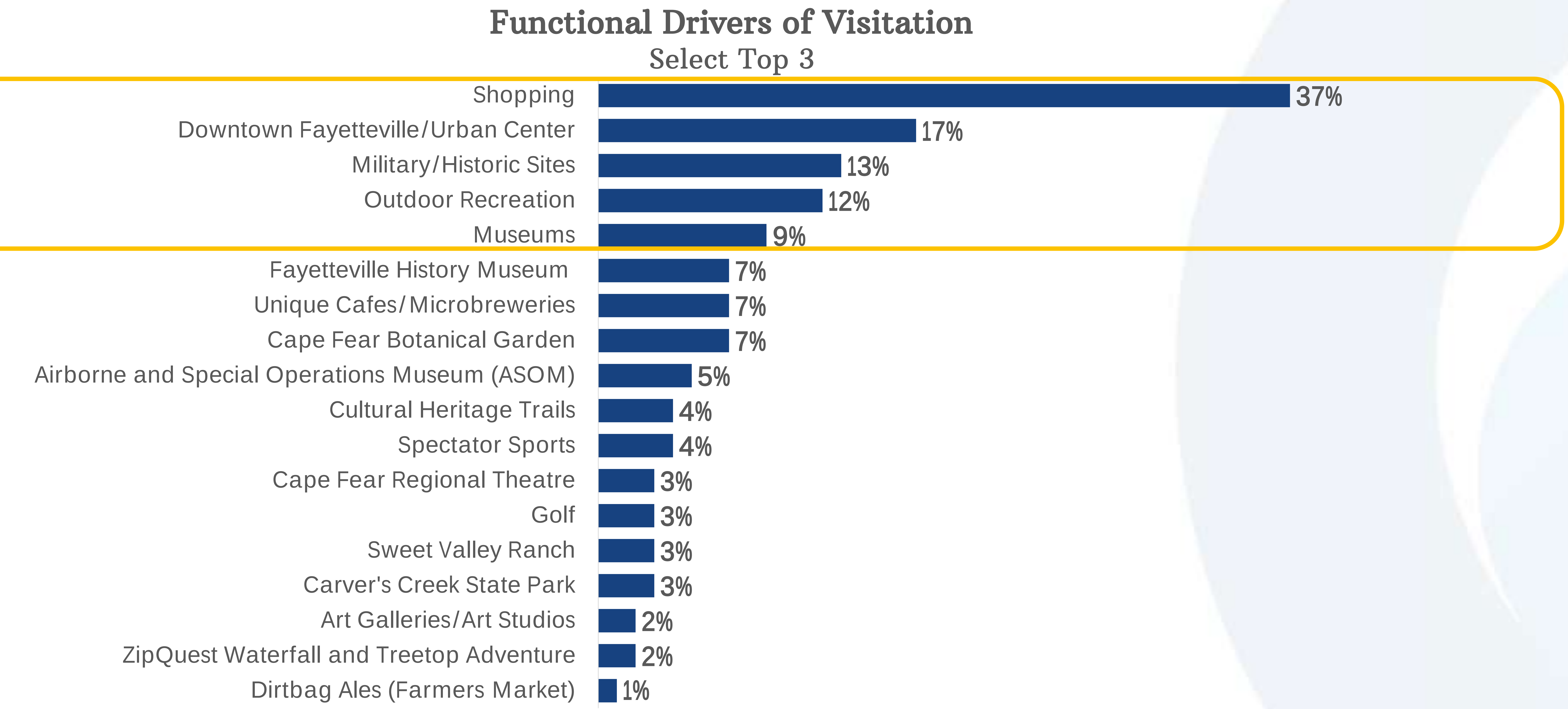
- Shopping
- Downtown/Urban Center
- Military/Historic Sites
- Outdoor Recreation
- Museums



Q27: Which of the following were a major influence in your decision to visit Fayetteville, NC/Cumberland County on this same visit?

RESPONDENT BASE: RECENT VISITORS WHO PARTICIPATED IN ACTIVITIES | N=276

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

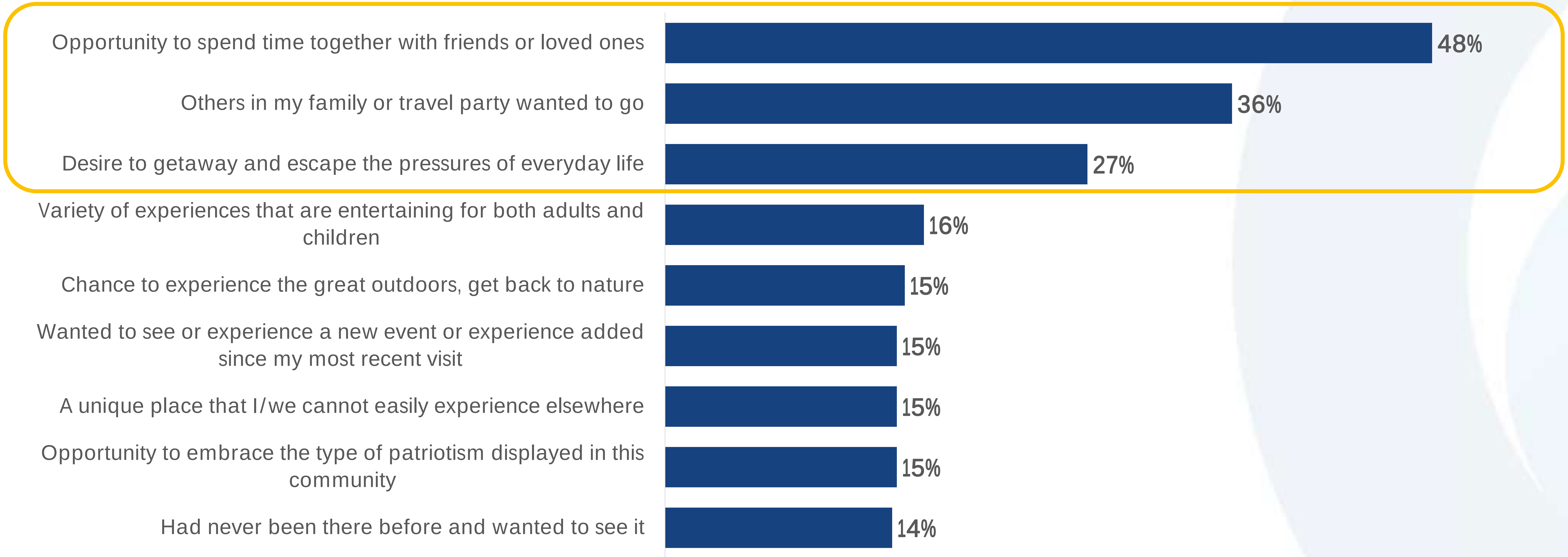


Q27: Which of the following were a major influence in your decision to visit Fayetteville, NC/Cumberland County on this same visit?

RESPONDENT BASE: RECENT VISITORS WHO PARTICIPATED IN ACTIVITIES | N=276

Functional drivers are essential, but emotional drivers are arguably more important. That is, spending time together with loved ones, being a "good friend" and/or getting away from everyday stress were the higher order emotional needs Fayetteville/Cumberland County visitors were seeking to satisfy.

Emotional Drivers
Select Top Two



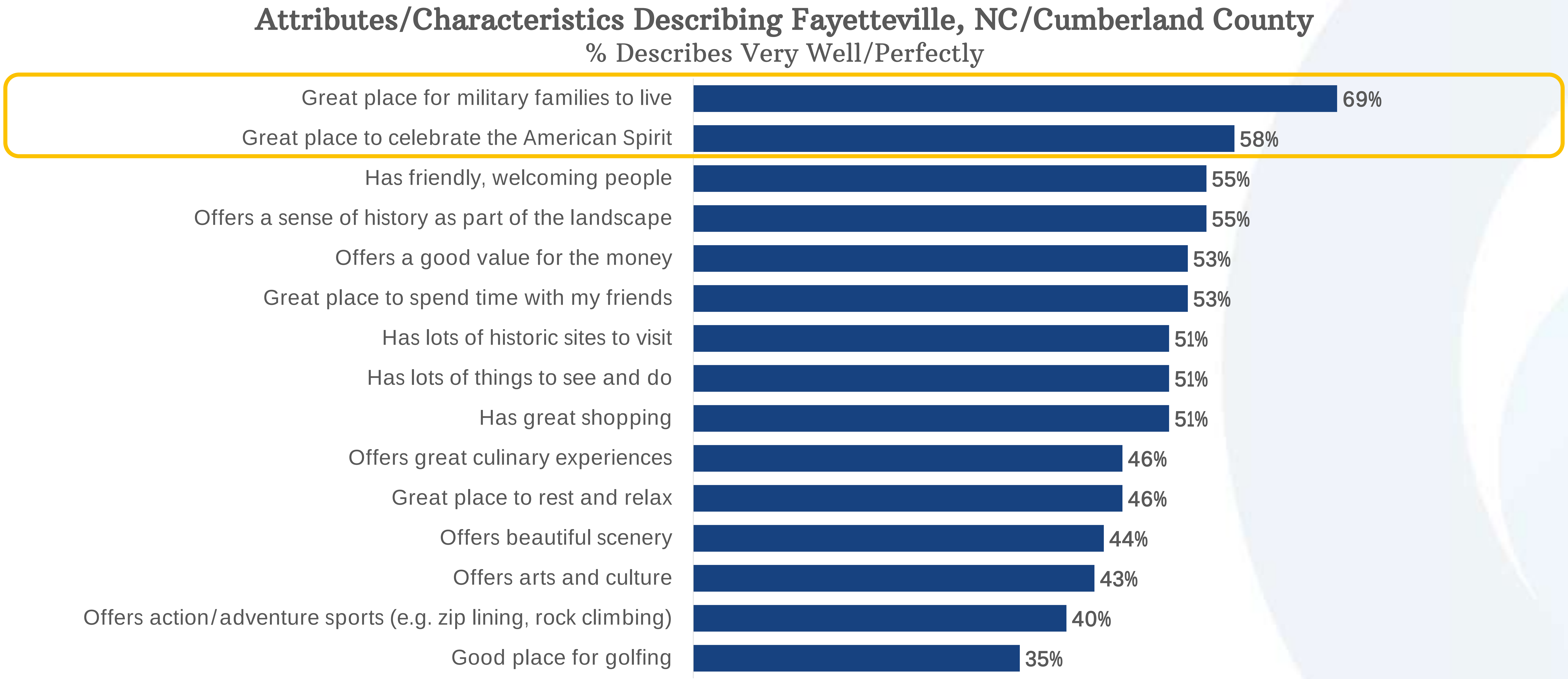
Q28: Please indicate how important the following issues were in motivating or inspiring you to visit Fayetteville, NC/Cumberland County on this visit.

RESPONDENT BASE: RECENT VISITORS | N=350

Geolocation intelligence applied to select POIs in Fayetteville/ Cumberland County indicate the preponderance of their collective visitation (71%) was generated from residents while only 29% was derived from tourists living beyond 50 miles.

	Visits	Frequency	Length of Stay	% 0-50	% Tourists	# 0-50 Miles	# Tourists
Crown Complex	944.6k	1.93	177	74.3%	25.7%	701.8k	242.8k
Segra Stadium	530.4k	1.39	55	82.2%	17.8%	436.0k	94.4k
ASOM	103.1k	1.28	71	51.7%	48.3%	53.3k	49.8k
Cape Fear Botanical Garden	96.4k	1.63	132	83.4%	16.6%	80.4k	16.0k
Fayetteville History Museum	9.6k	2.58	181	79.1%	20.9%	7.6k	2.0k
Average of all 5 above	336.8k	1.76	123	74.1%	25.9%	255.8k	81.0k
Average of bottom 3	69.7	1.83	128	71.4%	28.6%	47.1	22.6

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



Q20: Please rate how well you believe the following attributes describe Fayetteville, NC/Cumberland County

RESPONDENT BASE: RECENT VISITORS | N=350

Fayetteville/Cumberland County has numerous strengths such as friendly people, good value and lots to see and do. The concerns, however, are those attributes that score above average in importance and upon which the area earns below average satisfaction, e.g., "great culinary experiences," "great place to rest/relax" and "offers beautiful scenery."

Strengths Finder*

Secondary Strengths

- Offers a sense of history as part of the landscape
- Has lots of historic sites to visit
- Has great shopping
- Great place to celebrate the American Spirit

Strengths

- Offers a good value for the money
- Has friendly, welcoming people
- Has lots of things to see and do
- Great place to spend time with my friends

Low Priority

- Offers arts and culture
- Offers action/adventure sports (e.g. zip lining, rock climbing)
- Good place for golfing

Areas of Concern

- Great place to rest and relax
- Offers beautiful scenery
- Offers great culinary experiences

Q10: Which of the following attributes or characteristics are most important to you when considering attractions you would like to visit? Please select your top 5 choices. Q20: Please rate how well you believe the following attributes describe Fayetteville, NC/Cumberland County.

RESPONDENT BASE: RECENT VISITORS | N=350

Visitor Profile

Recent visitors are more likely to have taken a day-trip and to have taken the trip to visit friends and family.

Lapsed visitors are more likely to have visited with children in their party and have a slightly higher party size. Lapsed visitors also recall spending more.

		All Visitors	Recent Visitors	Lapsed Visitors
Segment Size		100%	60%	40%
% Visited Earlier This Year		40%	65%	0%
Overnight vs. Day-Trip	% Day Trip	39%	42%	34%
	% Stayed Overnight	61%	58%	66%
	Avg. Nights Stayed	1.8	1.8	1.9
Purpose of Visit	Vacation/Weekend Getaway	19%	15%	25%
	VFR	29%	32%	24%
	Business/Bleisure*	12%	13%	12%
	All Other	40%	40%	39%
Party Composition	Average Adult Age	44.5	43.7	45.6
	Average Child Age	8.5	8.5	8.3
	Party Size	2.4	2.3	2.6
	% Family Parties	51%	49%	55%
	% Adult Parties	49%	52%	45%
Spending	Per Party	$487	$449	$546
	Per Person	$203	$195	$210
Intent to Return	% Probably/Definitely Will	50%	61%	33%

*Includes categories "Business/Work" and "Combination of business/leisure"

RESPONDENT BASE: VISITORS | N=579

Visitor Profile – Resident vs Tourist

Not surprisingly, tourist visitors are much more likely to have visited earlier this year and are more likely to have taken a day-trip.

Tourist visitors skew toward adult parties, are slightly older and report spending more.

Tourist visitors are also far more likely to be visiting friends and family and less likely to be travelling for business.

		All Visitors	Resident Visitors	Tourist Visitors
Segment Size		100%	20%	80%
% Visited Earlier This Year		40%	72%	32%
Overnight vs. Day-Trip	% Day Trip	39%	60%	34%
	% Stayed Overnight	61%	40%	66%
	Avg. Nights Stayed	1.8	1.6	1.9
Purpose of Visit	Vacation/Weekend Getaway	19%	10%	21%
	VFR	29%	19%	31%
	Business/Bleisure	12%	20%	11%
	All Other	40%	51%	37%
Party Composition	Average Adult Age	44.5	41.9	45.1
	Average Child Age	8.5	8.6	8.4
	Party Size	2.4	2.5	2.4
	% Family Parties	51%	58%	50%
	% Adult Parties	49%	42%	51%
Spending	Per Party	$487	$366	$517
	Per Person	$203	$146	$216
Intent to Return	% Probably/Definitely Will	50%	74%	44%

RESPONDENT BASE: VISITORS | N=579

Visitor Profile by Purpose of Visit

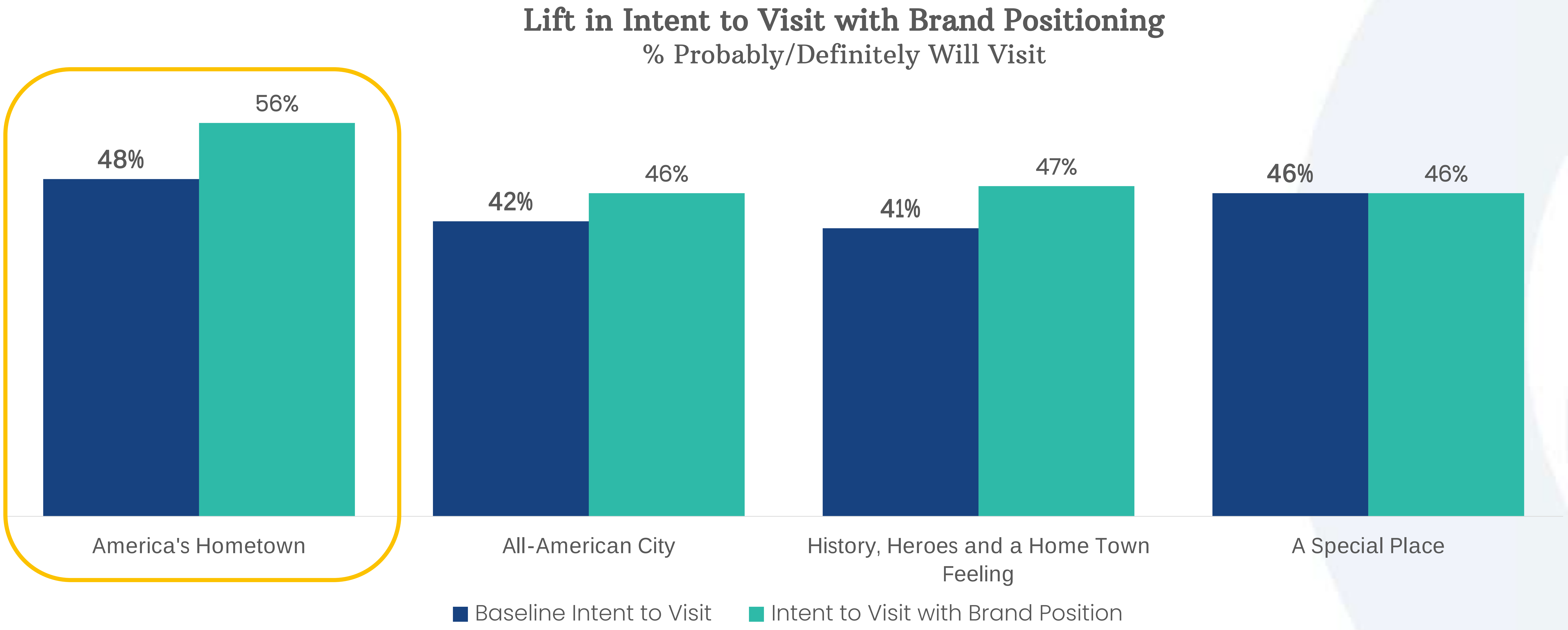
Those traveling for leisure are much more likely to have stayed the night and report having stayed nearly three nights in the area.

These longer stays translated into higher reported spending. This group is also the most likely to return by significant margins.

		All Visitors	Vacation/ Weekend Getaway	VFR	Business/ Bleisure	All Other
Segment Size		100%	19%	29%	12%	40%
% Visited Earlier This Year		40%	25%	48%	43%	40%
Overnight vs. Day-Trip	% Day Trip	39%	12%	20%	36%	66%
	% Stayed Overnight	61%	88%	80%	64%	34%
	Avg. Nights Stayed	1.8	2.9	2.4	1.6	0.9
Purpose of Visit	Vacation/Weekend Getaway	19%	100%	0%	0%	0%
	VFR	29%	0%	100%	0%	0%
	Business/Bleisure	12%	0%	0%	100%	0%
	All Other	40%	0%	0%	0%	100%
Party Composition	Average Adult Age	44.5	41.5	39.6	44.4	50.0
	Average Child Age	8.5	8.5	8.5	8.0	8.4
	Party Size	2.4	2.7	2.7	1.8	2.3
	% Family Parties	51%	66%	54%	36%	44%
	% Adult Parties	49%	34%	46%	64%	56%
Spending	**Per Party**	$487	$877	$489	$502	$297
	Per Person	$203	$325	$181	$279	$129
Intent to Return	% Probably/Definitely Will	50%	70%	56%	51%	35%

RESPONDENT BASE: VISITORS | N=579

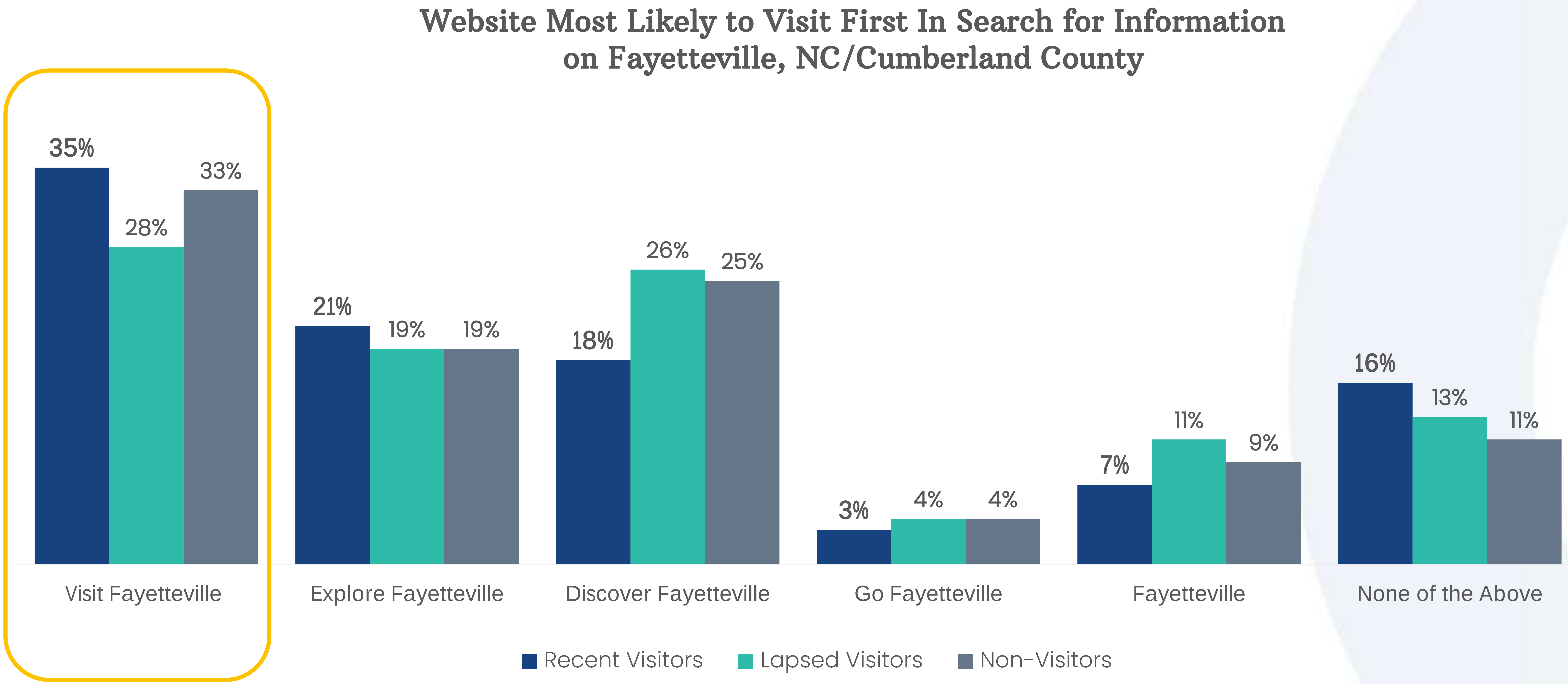
America's Hometown is the preferred brand position among regional travelers and was the only statement to generate a significant lift in intent to visit the area. The other three all cluster together in a distant second place.



Q37A/B/C/D: Please indicate how likely you would be to visit Fayetteville/Cumberland County in the next 12 months if you saw/read the destination positioned using the descriptive phrase below.

RESPONDENT BASE: ALL RESPONDENTS IN A/B/C/D SPLIT | N=200 PER SPLIT

All segments are most likely to use the "Visit Fayetteville" URL when searching for information on the area.



36: If you were searching for information on Fayetteville, NC/Cumberland County from the official tourism bureau, which of the following websites would you be most likely to try first?

RESPONDENT BASE: RECENT VISITORS | N=350; LAPSED VISITORS | N=229; NON-VISITORS | N=450

FAYETTEVILLE/CUMBERLAND COUNTY
VISITOR MARKET STUDY

Hurdles/Barriers To Visitation

In unaided comments, those who haven't visited Fayetteville/Cumberland County in the past five years organically said COVID-19 and being too busy are some of the reasons they haven't visited lately.

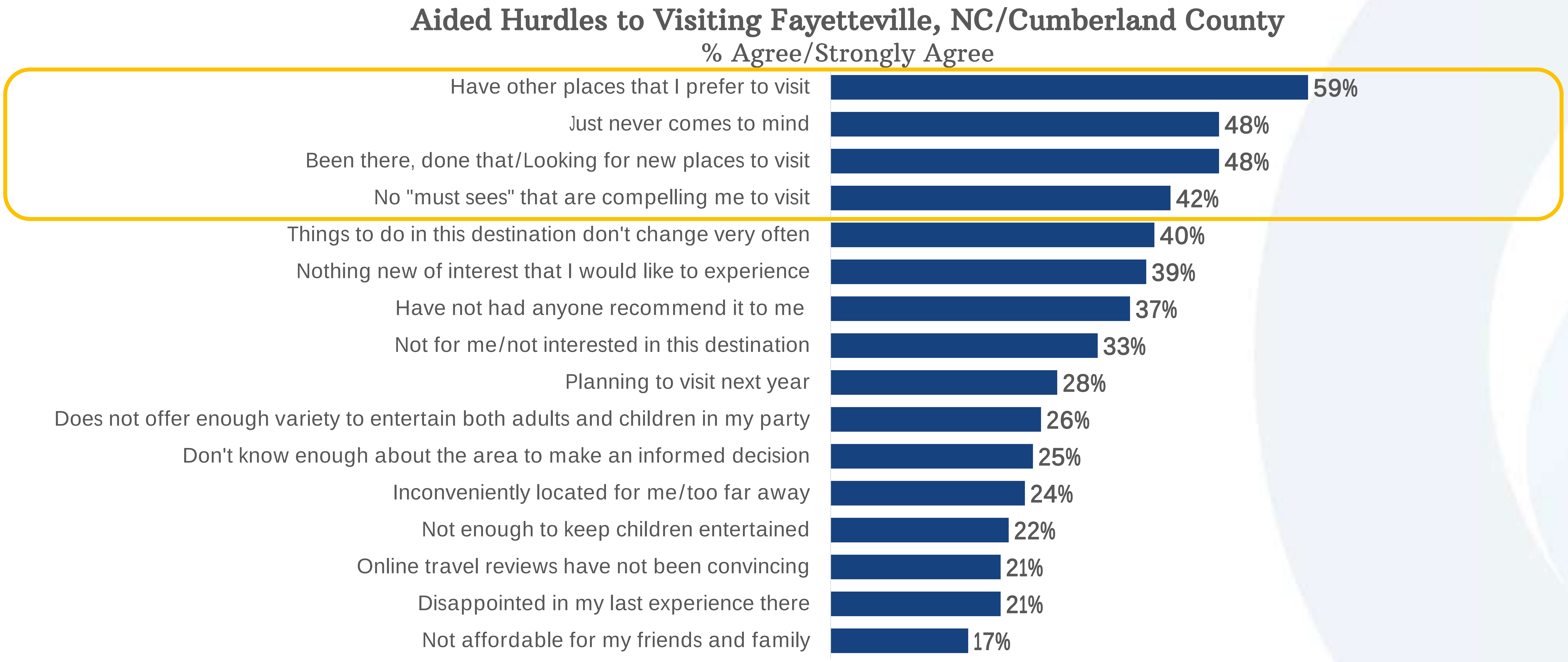
Unaided Hurdles to Visiting Fayetteville, NC/Cumberland County

No Particular Reason – 27%	*"No particular reason, I just haven't had a need to return.."*
COVID-19 – 14%	*"COVID-19 has stopped my family and I from leaving the house unnecessary.."*
Too Busy – 12%	*"Not enough time."*
Not Interested – 8%	*"Not interested in going back."*
Been There, Done That – 5%	*"I've seen what I went to see. No need to see it again at this time."*

Q34: Do you have any particular reason why you have not visited the Fayetteville, NC/Cumberland County area, or at least not visited in recent years? Please be specific.

RESPONDENT BASE: LAPSED VISITORS | N=229

Lapsed visitors, or those who haven't visited in the past 5 years, indicated the largest hurdles to returning are having other places they prefer to visit, not being top-of-mind and looking for new places.



Q35: Please rate how strongly you agree with the following reasons for why you have not visited Fayetteville, NC/Cumberland County in the past 5 years or ever.

RESPONDENT BASE: LAPSED VISITORS | N=229

Lapsed visitors' derived hurdles, or those that correlate most closely with low intent, reveal that no "must sees," preference for other places and a lack of interest are the biggest impediments to visitation.

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

Q35: Please rate how strongly you agree with the following reasons for why you have not visited Fayetteville, NC/Cumberland County in the past 5 years or ever.

RESPONDENT BASE: LAPSED VISITORS | N=229

In unaided comments, those who have never visited said they are too busy, don't have a reason to go to Fayetteville/Cumberland County or don't know enough about it.

Unaided Barriers to Visiting Fayetteville, NC/Cumberland County

Too Busy – 18%	*"I just didn't have enough time for it so far."*
No Reason to Visit – 16%	*"Could find no good reason to go there."*
Lack of Knowledge – 12%	*"Don't know anything about it, don't know what there is to do or see."*
COVID-19 – 11%	*"Just haven't felt safe enough to travel."*
Other Places to Go – 8%	*"Have other places I preferred to see."*

Q34: Do you have any particular reason why you have not visited the Fayetteville, NC/Cumberland County area, or at least not visited in recent years? Please be specific.

RESPONDENT BASE: NON-VISITORS | N=450

Non-visitors indicated the largest barrier preventing them form visiting is having other places they prefer to visit.

Aided Barriers to Visiting Fayetteville, NC/Cumberland County

% Agree/Strongly Agree

Q35: Please rate how strongly you agree with the following reasons for why you have not visited Fayetteville, NC/Cumberland County in the past 5 years or ever.

RESPONDENT BASE: NON-VISITORS | N=450

Non-visitors' derived barriers, or those that correlate most closely with low intent, reveal that no "must sees," preference for other places and a lack of interest are the biggest impediments to visitation—the same as lapsed visitors' derived hurdles.

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

Q35: Please rate how strongly you agree with the following reasons for why you have not visited Fayetteville, NC/Cumberland County in the past 5 years or ever.

RESPONDENT BASE: NON-VISITORS | N=450

FAYETTEVILLE/CUMBERLAND COUNTY
VISITOR MARKET STUDY

Demographics

Demographics

		Overall	Recent Visitors	Lapsed Visitors	Non-Visitors
Gender	Male	39%	38%	42%	40%
	Female	61%	62%	58%	60%
Respondent Age	Avg. Age	45.9	45.0	47.4	46.7
	18-34 Years	31%	36%	25%	27%
	35-54 Years	35%	31%	39%	38%
	55+ Years	34%	33%	36%	35%
Average Household Income		$83.4k	$83.3k	$80.8k	$83.4k
Household Income	<$75k	67%	68%	69%	66%
	$75k+	33%	32%	31%	34%
Household Ages	Under 12 Years	16%	17%	16%	15%
	12-17 Years	8%	8%	8%	7%
	18-34 Years	25%	27%	23%	23%
	35-54 Years	25%	24%	26%	27%
	55+ Years	26%	24%	27%	28%
Household Size		2.5	2.6	2.6	2.5
Household Composition	Families	53%	55%	53%	52%
	Adults	47%	45%	47%	48%
Ethnicity	White/Caucasian	73%	70%	74%	76%
	Non-White/Caucasian	27%	30%	26%	24%

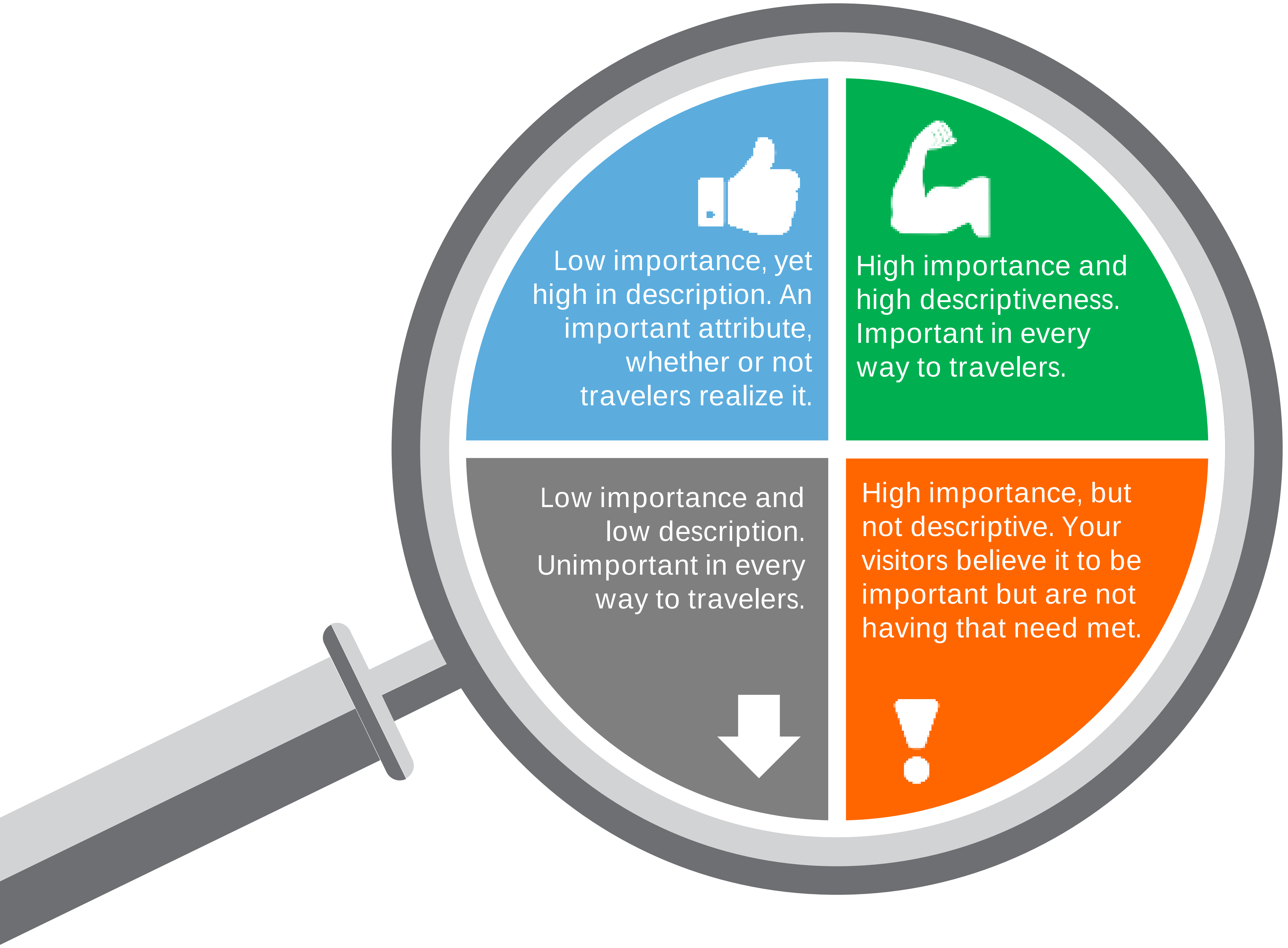
FAYETTEVILLE/CUMBERLAND COUNTY
VISITOR MARKET STUDY

Appendix

H2R Proprietary Industry Norms

- For select data points, this study references H2R Proprietary Industry Norms. This is normative data created, implemented and curated by H2R Market Research and is used to provide broader context for the results of each themed concept.
- The H2R Norms are an application of a disciplined methodology where the wording of questions, positioning, scales and target markets are of a similar character, size and scope.
- They have been curated over the past five years from comparable studies conducted in the travel/tourism marketplace.

H2R Strengths Finder



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

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

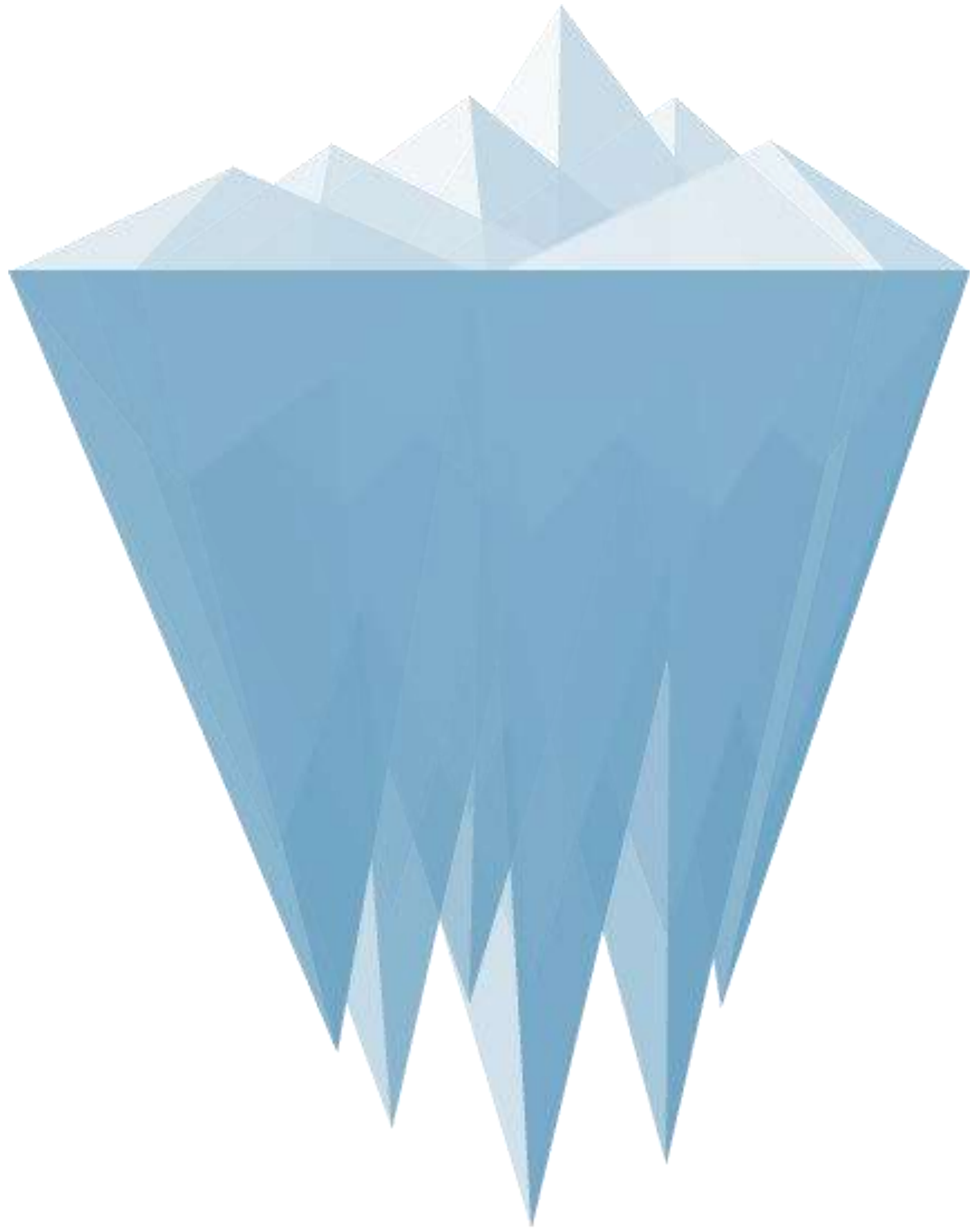
The resulting analysis illustrates which elements are most important by plotting each characteristic into one of four quadrants.

Hurdle/Barrier Analysis

On the surface, prospects often provide fairly standard excuses for their behavior, which we refer to as Stated Hurdles/Barriers.

Correlation analysis reveals to what extent prospects' Stated Hurdles/Barriers match up with their intent to visit.

Arguably, the higher the correlation a hurdle/barrier has with intent to visit, the more credible the barrier is as a root cause of not experiencing. Those that correlate highest are referred to as Derived Hurdles/Barriers.



Stated Hurdles/Barriers

(what travelers *said* is keeping them from visiting)

Derived Hurdles/Barriers

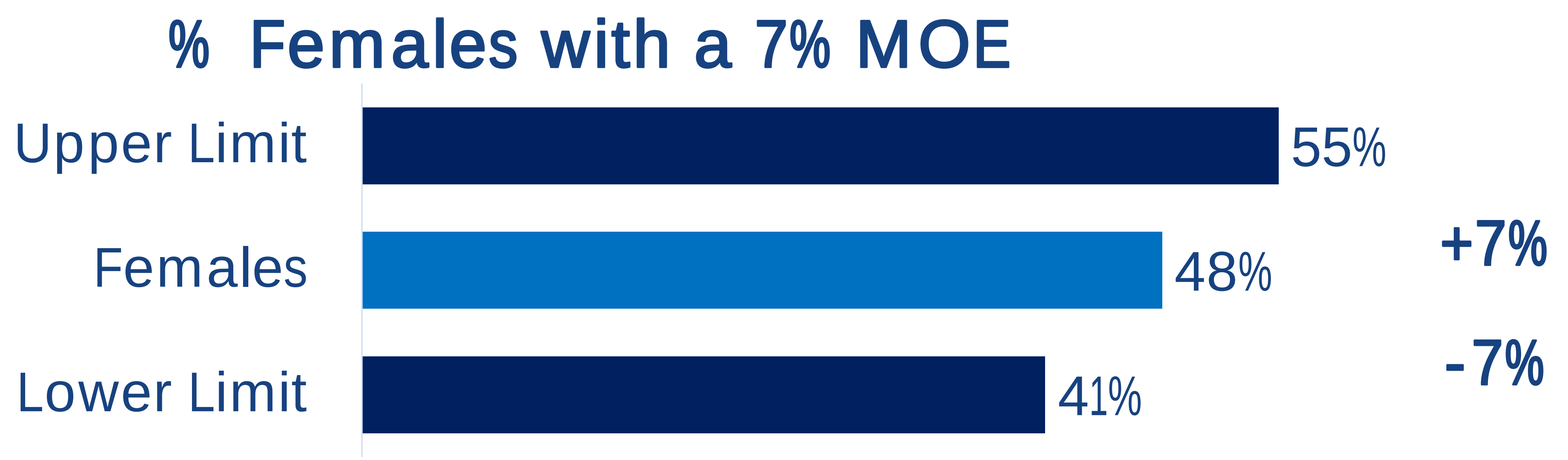
(what *actually* correlates with their intent to visit)

Margin of Error and Statistical Significance

- Since it is typically impossible to survey every person in a target market, a sample of the market is interviewed. **Margin of Error** refers to a range that the reported number is estimated to fall between, had you interviewed every person. It is calculated based on the sample size and confidence interval. For example:

$$\sqrt{\frac{0.9604 \text{ (for 95\% Confidence Interval)}}{200 \text{ (Sample Size)}}} = +/-7\%$$

- The range is calculated by adding and subtracting the margin of error percentage to the percentage of people who answered the question. For example:



- At a 95% confidence interval, the margin of error range will include the "true" value 95% of the time (the value you would get by surveying the entire population). A variance in scores is **statistically significant** when the difference between the two is greater than the margin of error.

THANK YOU

GET IN TOUCH WITH US

H2R Market Research
Springfield | Branson | Bentonville

jhenry@h2rmarketresearh.com
jrenner@h2rmarketresearch.com