

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

Foundational Tourism Research Initiative

Report Prepared January 2022



Phase 1:
1 Stakeholder Study
Pages 3-11

Phase 2:
2 Scout Report
Pages 12-16

Phase 3:
3 Tourism Market Study
Pages 17-37

FACVB's FOUNDATIONAL TOURISM RESEARCH

Project Overview

Purpose. The Fayetteville Area Convention & Visitor Bureau's (FACVB's) Foundational Tourism Research Initiative delivered insights from three different bodies of work:

1. Stakeholder Study. Tourism insights from local stakeholders;
2. Scout Report. Geographic distribution of Fayetteville/Cumberland County's visitors fueled by tourists' (outside Cumberland County) cell phone signals;
3. Tourism Market Study. Regional traveler assessment that measures traveler sentiment, brand health, visitor profile and barriers to visitation.

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

Phase 1:

Stakeholder Study

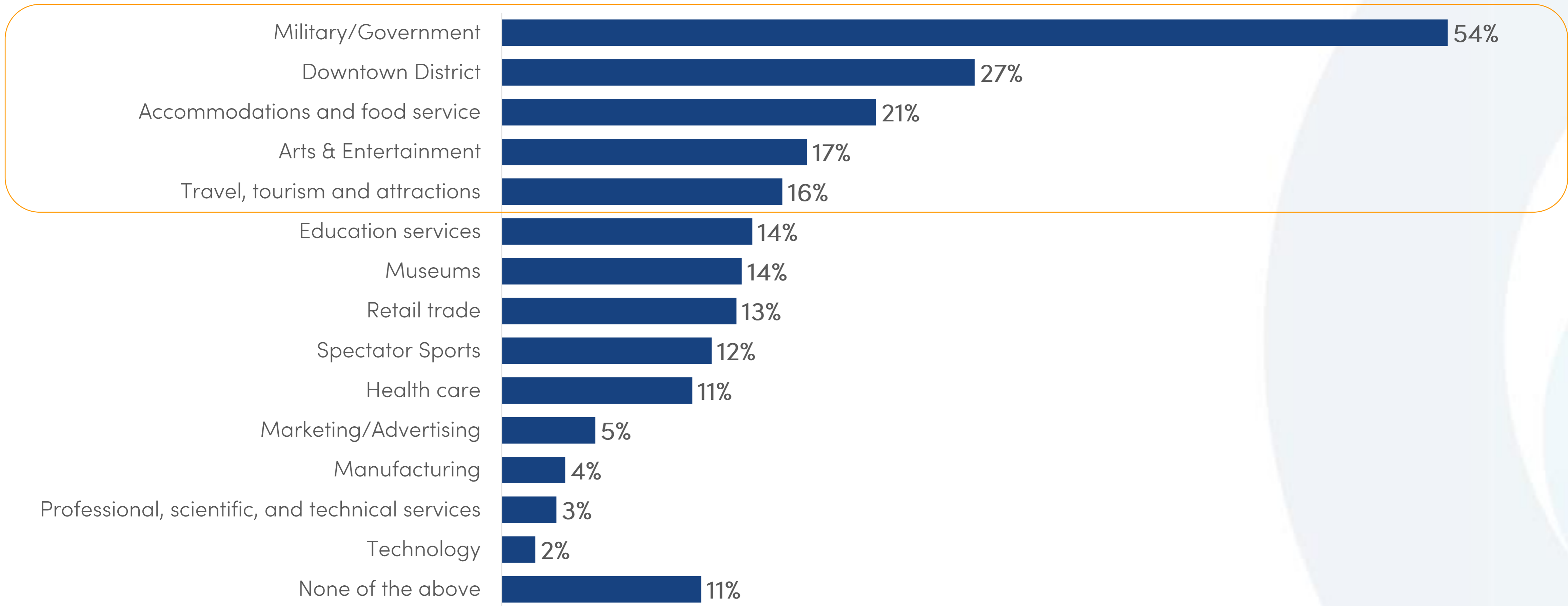


Stakeholder Study

- 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 business people 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 the use the preponderance of information gathered from both efforts to help optimize community assets and the Fayetteville/Cumberland County tourism brand.

More than half of area stakeholders 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



Q11: In your opinion, which of the following areas/aspects do you feel that the Fayetteville NC/Cumberland County area truly excels in?

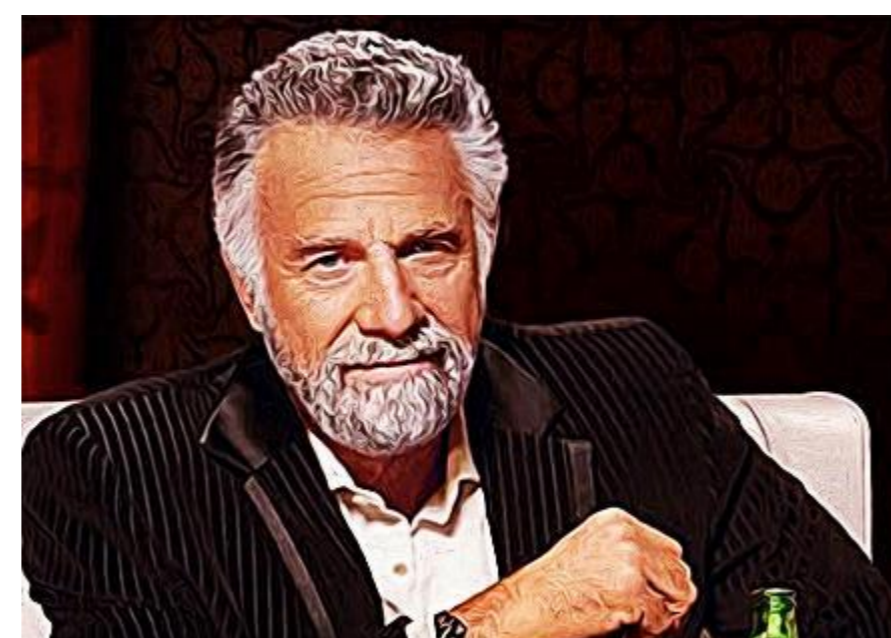
Words/phrases community stakeholders feel best describe the Fayetteville/Cumberland County community include a sense of history & military presence, lots of diversity, interesting people & diverse strengths that are a welcome surprise.



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

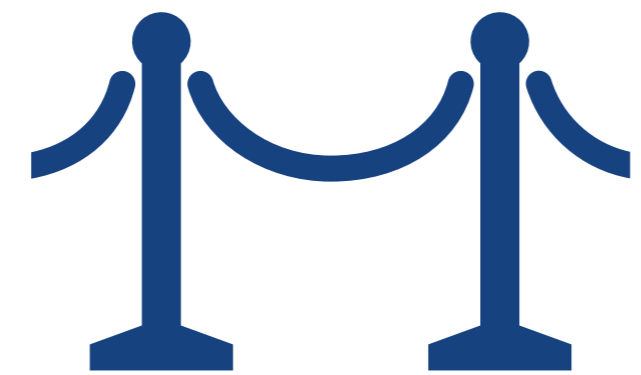
The most popular Points of Interest (POI) in the area include area military/historical sites, Airborne & Special Operations Museum (ASOM) and Cape Fear Botanical Garden.

5 Most Popular Area Activities/Attractions



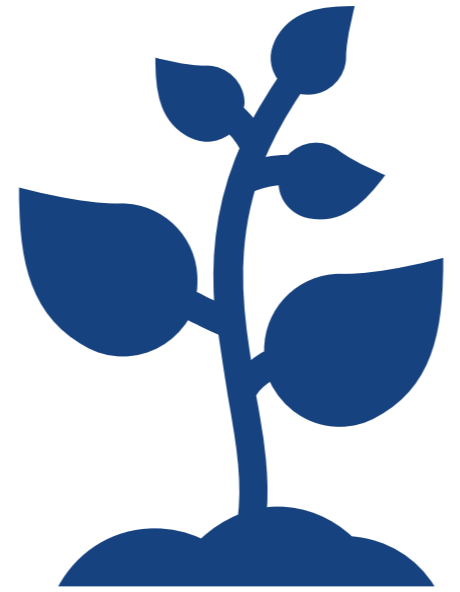
45%

Military/Historical Sites



43%

ASOM



34%

Cape Fear Botanical Garden



29%

Spectator Sports



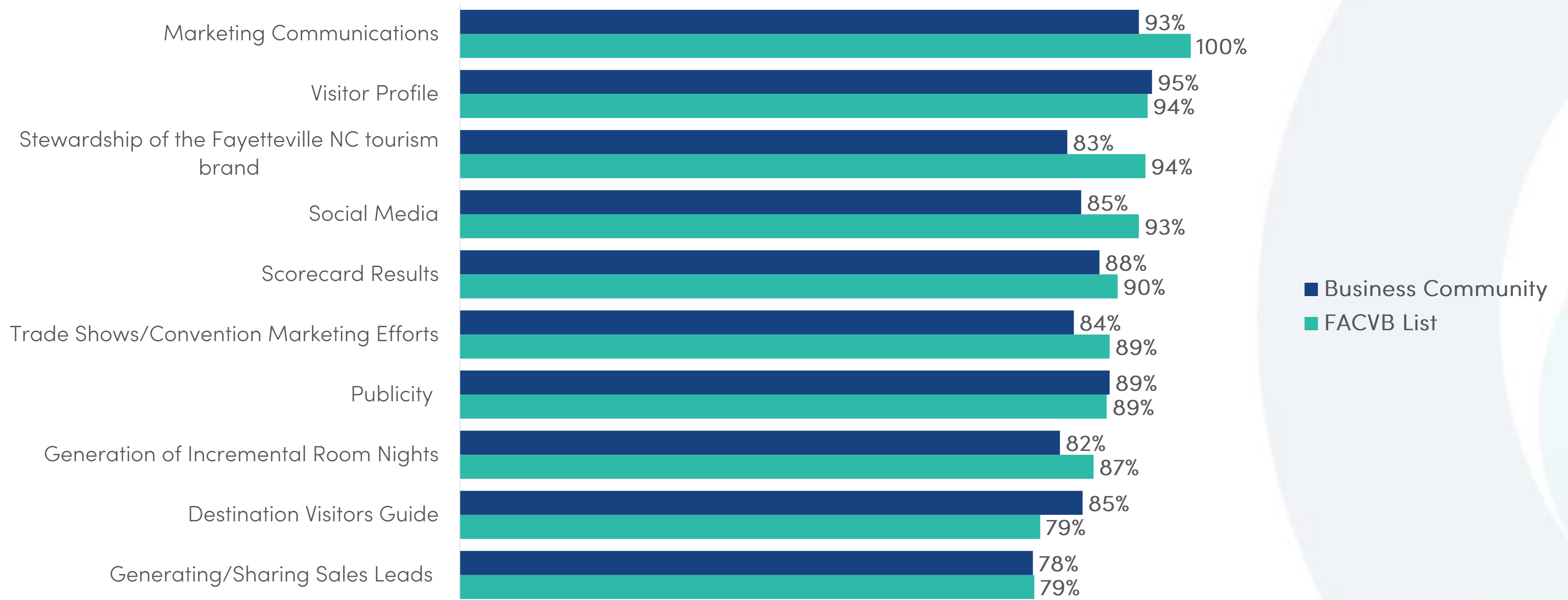
27%

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.

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

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



Q24: Please indicate how important these convention & visitor bureau programs, actions and opportunities are to you and/or your place of business.

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

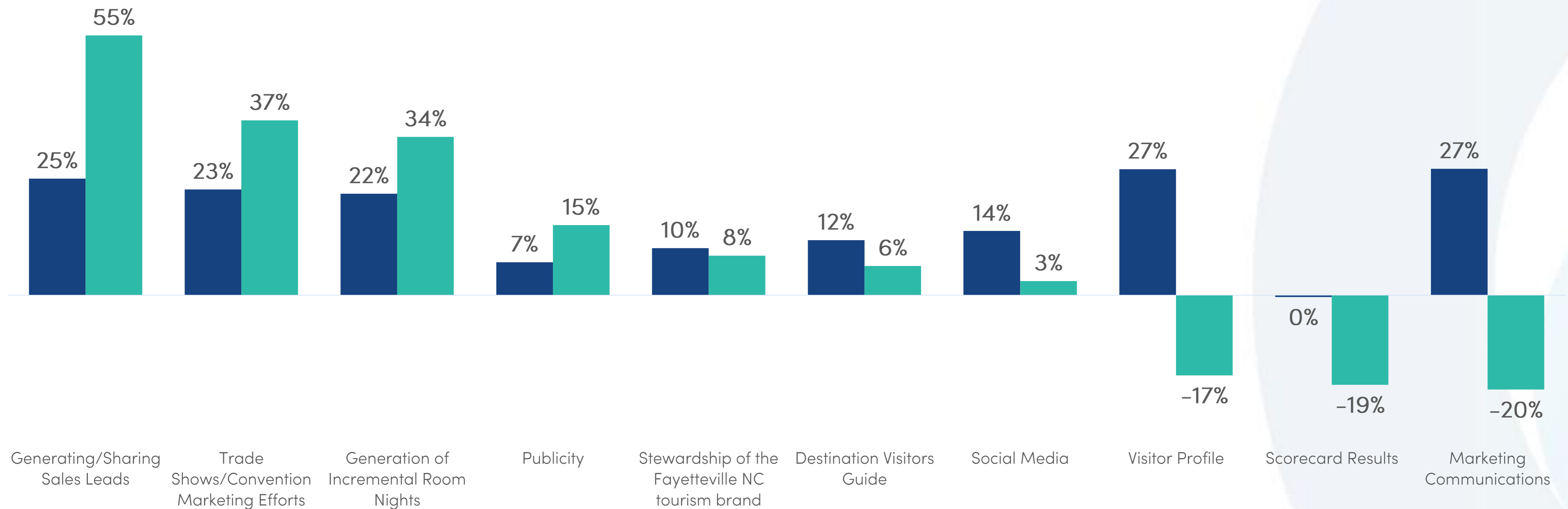
When evaluating attribute importance with satisfaction, FACVB member/partners indicate the organization’s strengths are many and concerns are few. Surprisingly, members rate the generation of incremental room nights and sales leads as being below average in both importance and satisfaction.



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

% Correlation with Intent to Engage



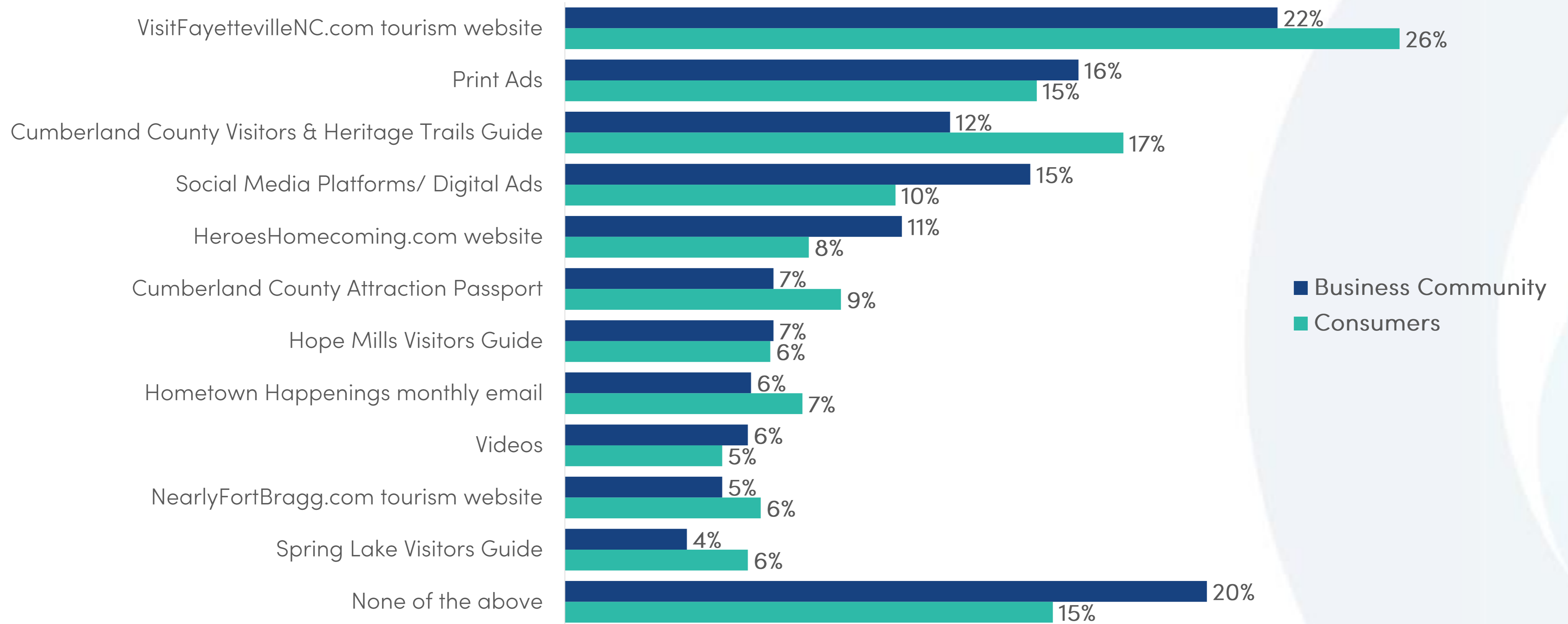
Q25: Please indicate how satisfied you have been with your experience as it relates to each of these programs, actions and opportunities provided by the Fayetteville Area Convention & Visitors Bureau.

■ 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.

Phase 2

Scout Report





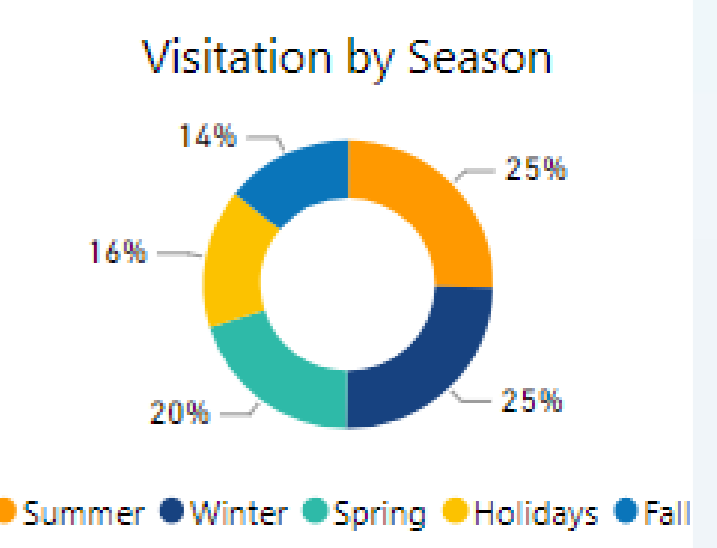
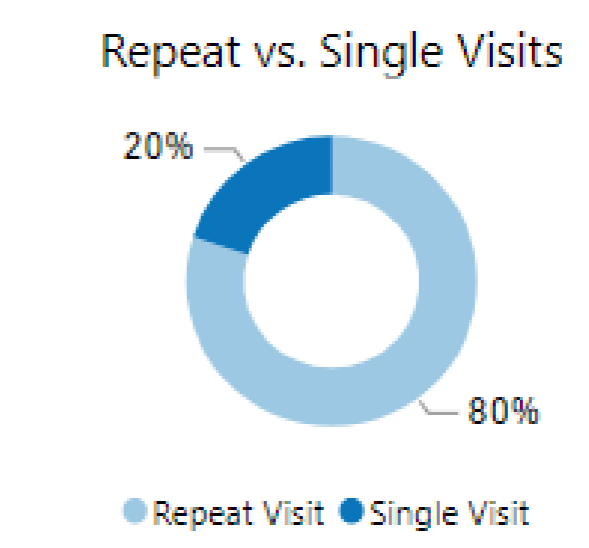
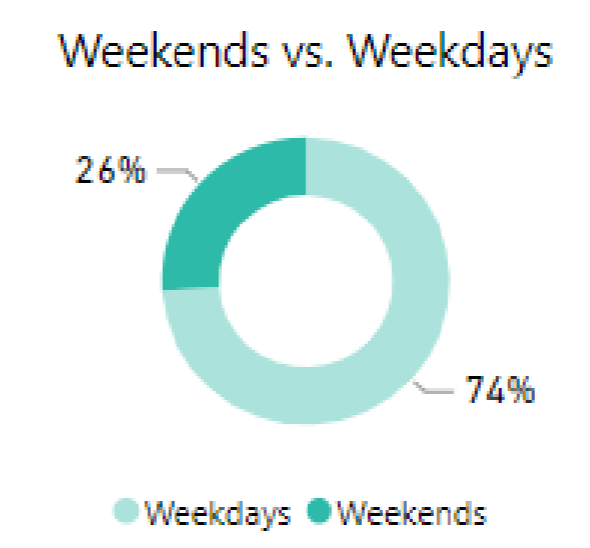
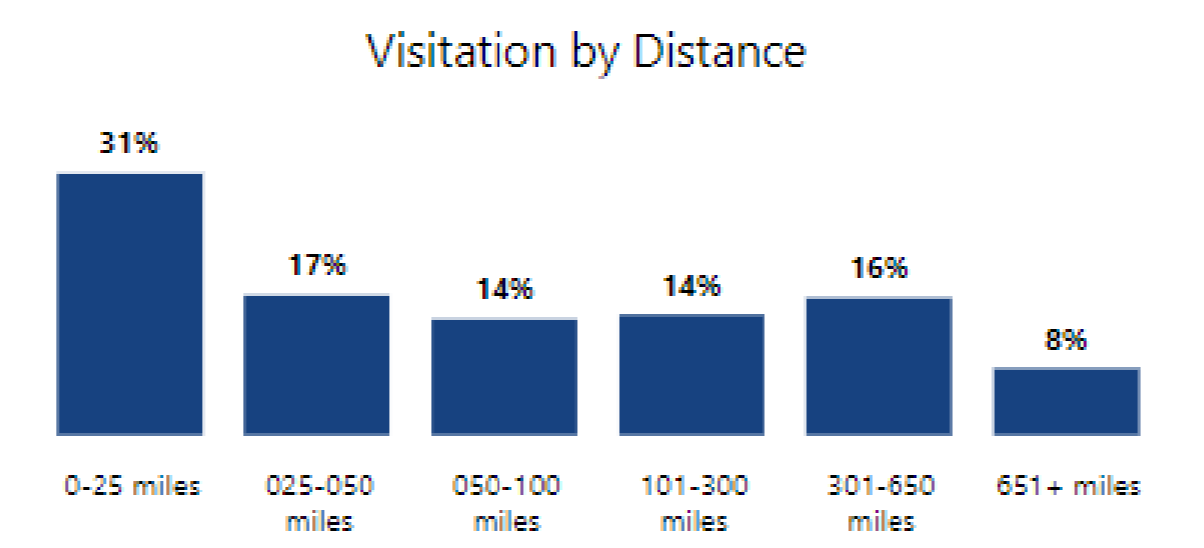
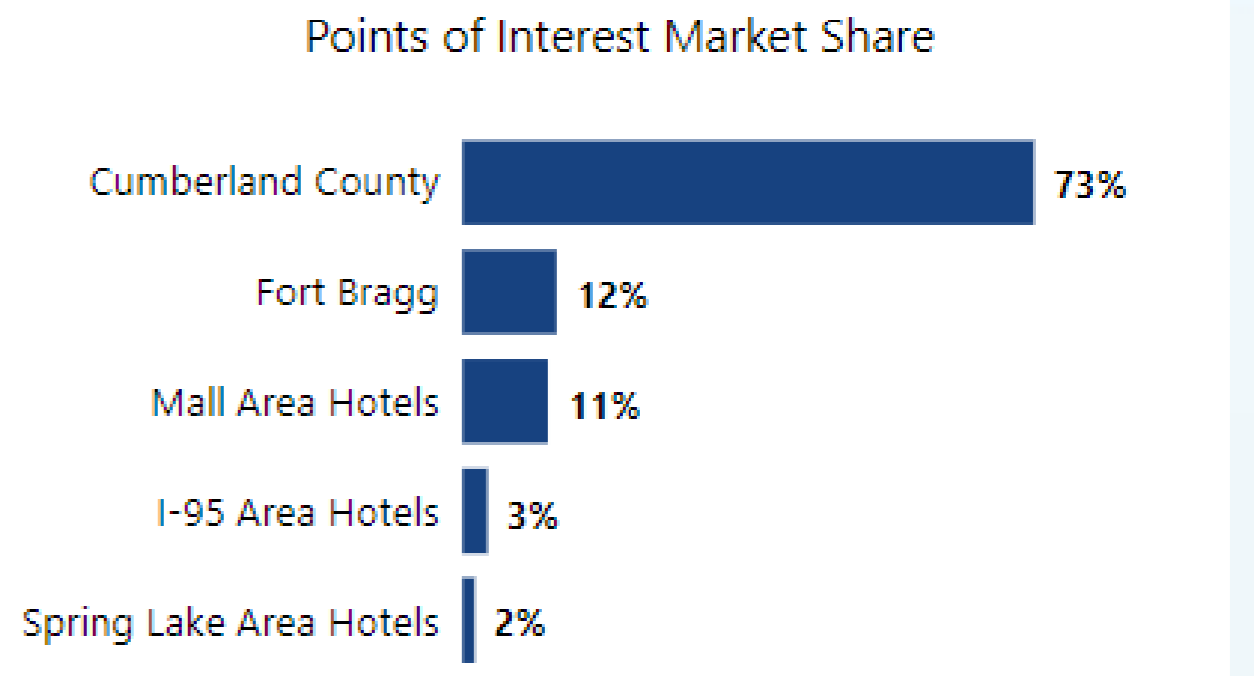
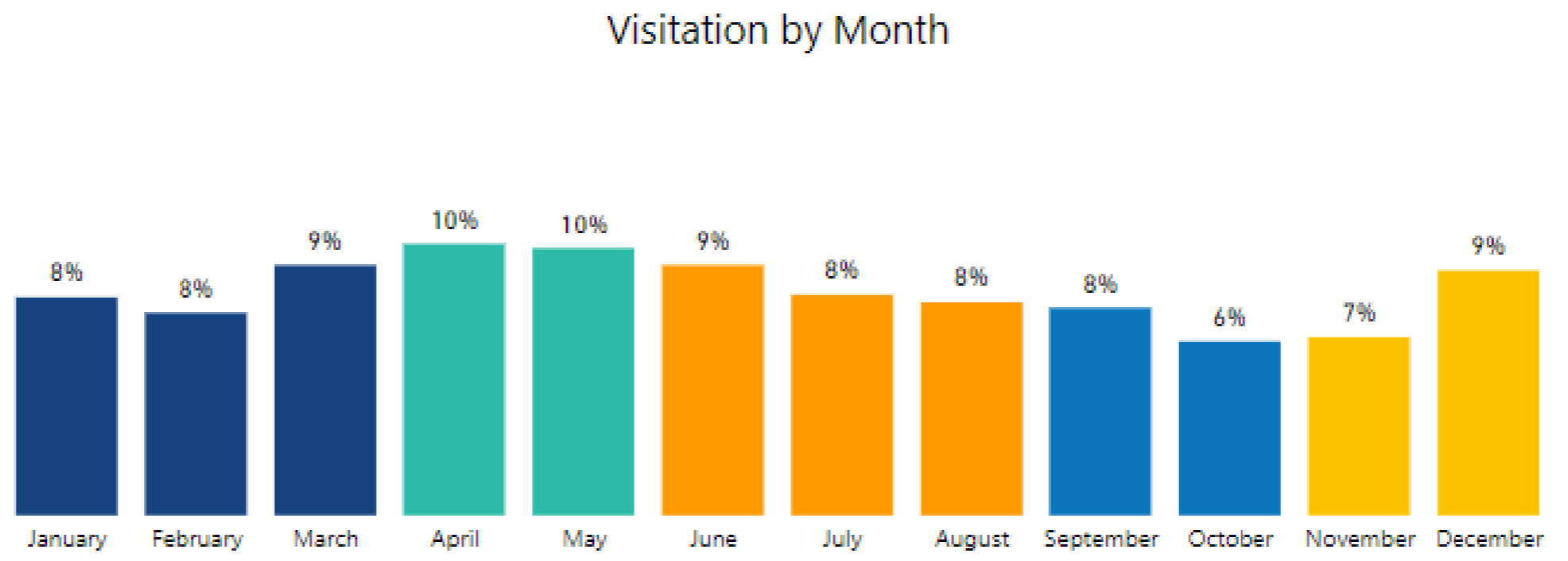
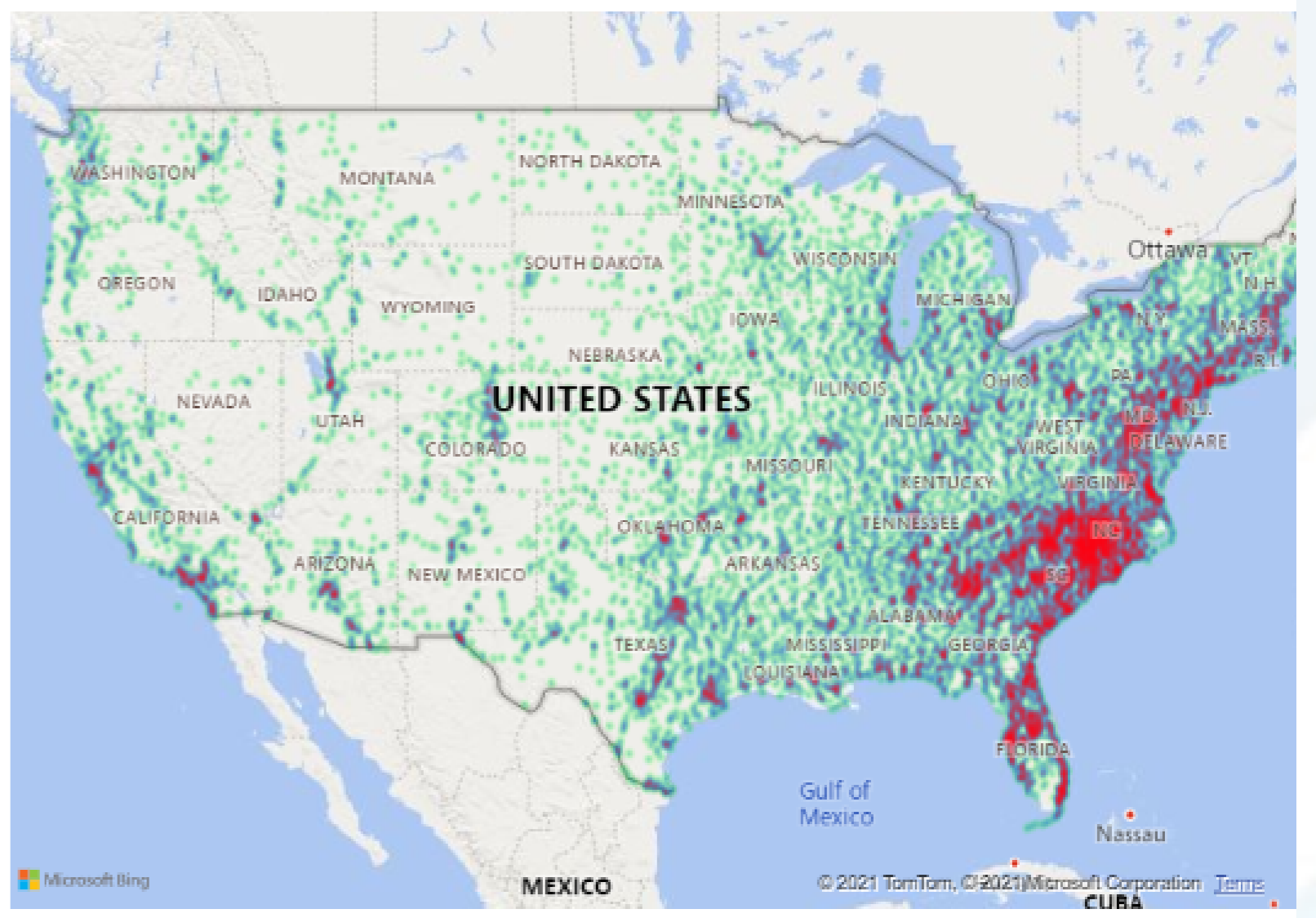
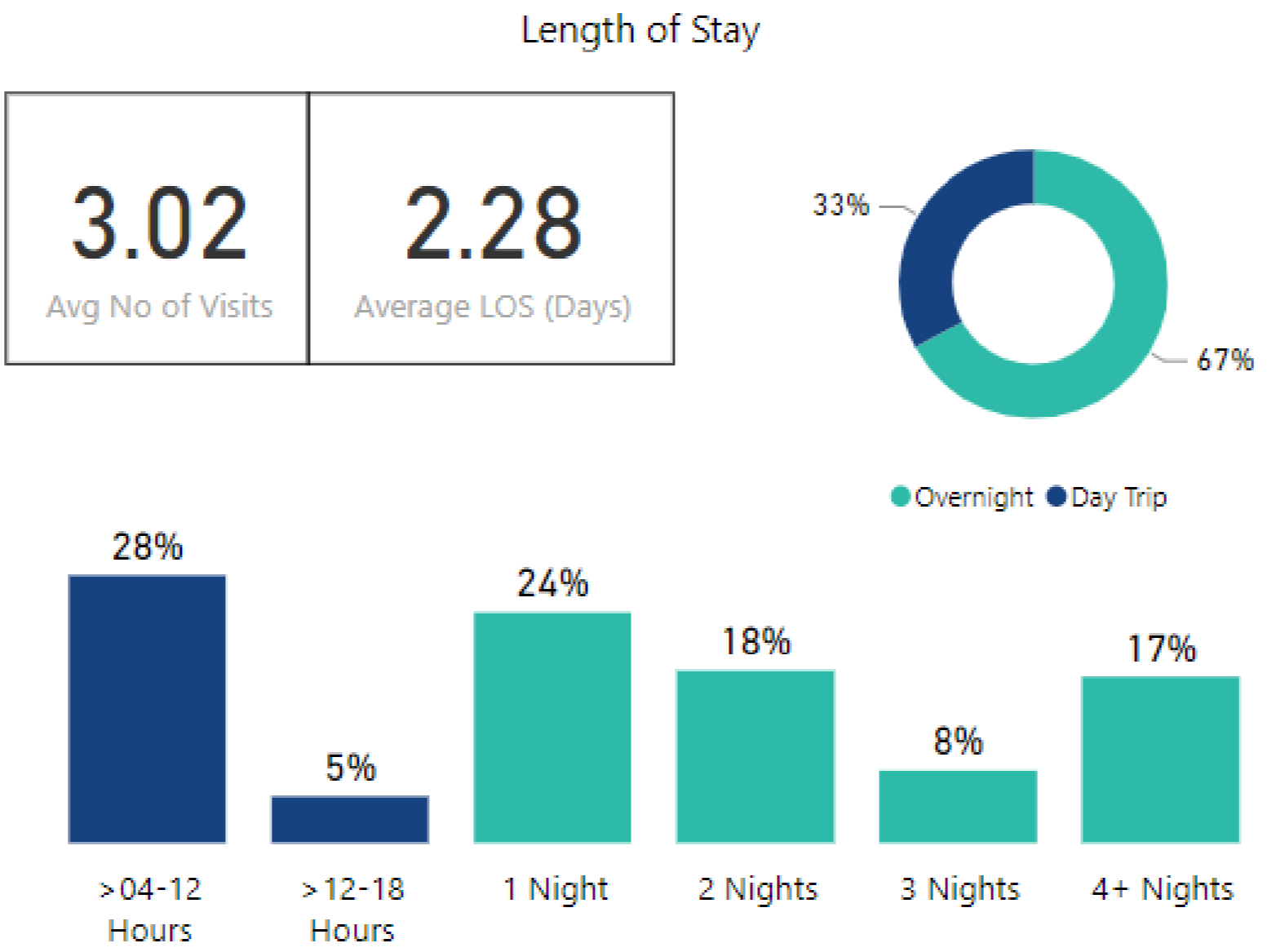
Cumberland County, NC

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



Filter to Provide a Dynamic Profile by Market (Savannah)



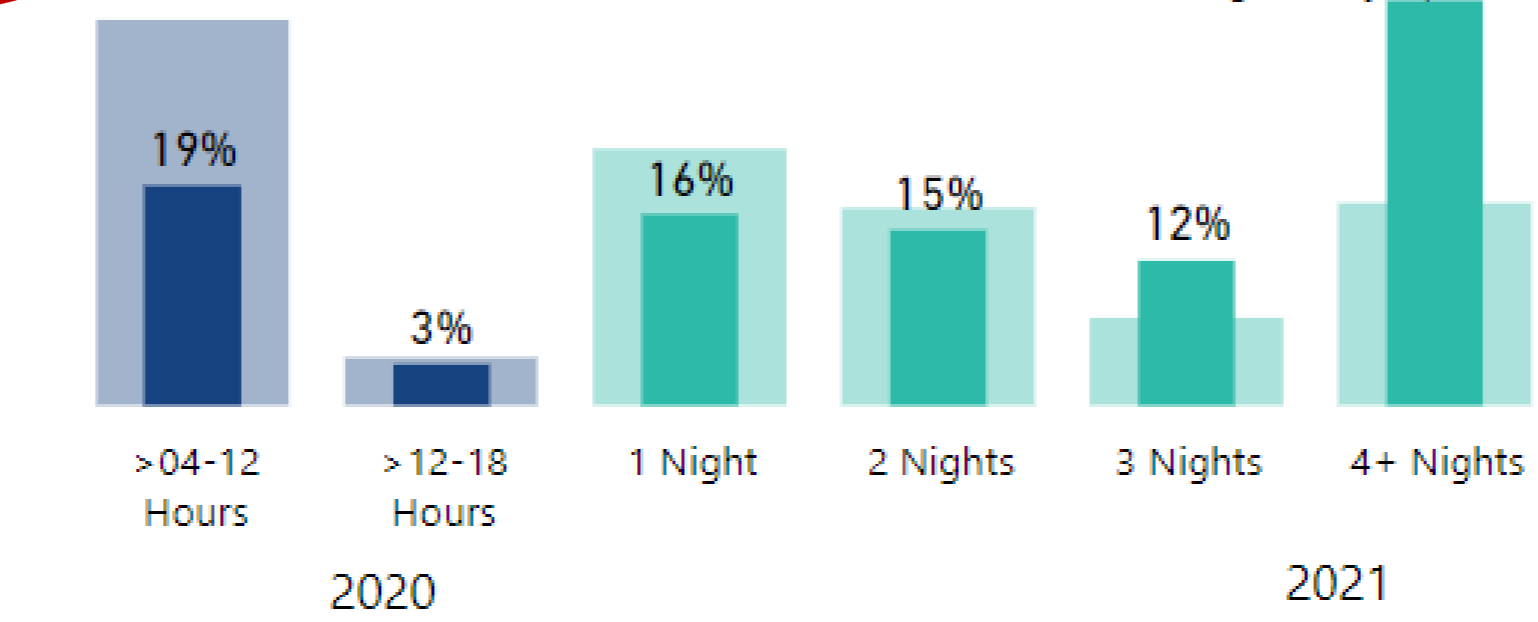
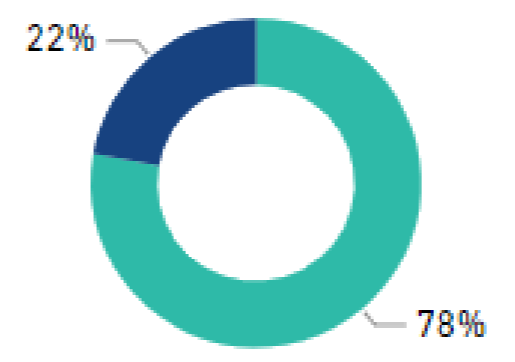
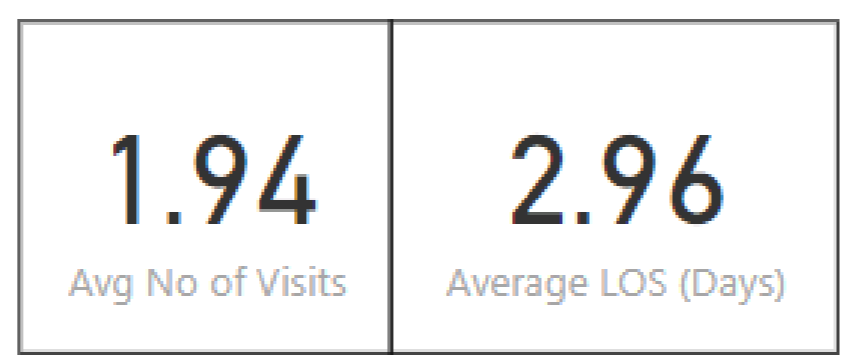
Cumberland County, NC
July 2020 - August 2021

The Cumberland County, NC Scout Report contains 1,634,874 domestic data pings that entered the geofence around Cumberland County, NC between July 2020 and August 2021. 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.

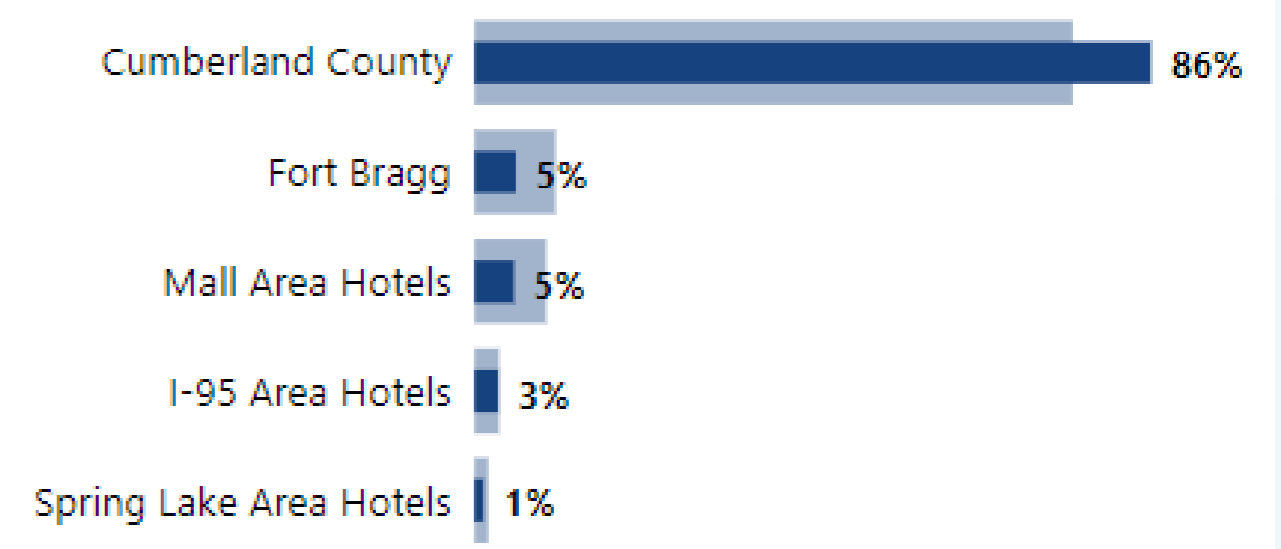
DMA	%	BDI
RALEIGH-DURHAM	45.15%	4,915.05
MYRTLE BEACH-FLORENCE	10.15%	4,178.77
WILMINGTON	3.80%	2,642.09
GREENVILLE-NEW BERN-WASHINGTON	2.10%	830.71
GREENSBORO-HIGH POINT-WINSTON SALEM	2.22%	399.73
CHARLOTTE	2.12%	331.08
SAVANNAH	0.93%	327.73
COLUMBIA, SC	1.38%	295.86
RICHMOND-PETERSBURG	1.15%	255.92
AUGUSTA	0.56%	254.36
NORFOLK-PORTSMOUTH-NEWPORT NEWS	1.44%	236.46
CHARLESTON, SC	0.82%	236.08
JACKSONVILLE	0.97%	175.35
SALISBURY	0.19%	141.46
COLUMBUS, GA	0.25%	138.20
WASHINGTON, DC-HAGRSTWN	2.71%	132.96
ORLANDO-DAYTONA BEACH-MELBOURNE	1.51%	128.50
DOTHAN	0.10%	120.66
CHARLOTTESVILLE	0.09%	118.71
BALTIMORE	0.93%	100.90
MACON	0.21%	98.39
GREENVILLE-SPARTANBURG-ASHEVILLE	0.65%	93.32
WATERTOWN	0.07%	89.76
TAMPA-ST PETERSBURG-SARASOTA	1.23%	88.71
ROANOKE-LYNCHBURG	0.31%	83.58
HARRISBURG-LANCASTER-LEBANON-YORK	0.52%	83.20
HARRISONBURG	0.06%	80.51
GAINESVILLE	0.08%	79.10
TALLAHASSEE-THOMASVILLE	0.18%	77.01
ALBANY, GA	0.14%	75.14
WEST PALM BEACH-FT PIERCE	0.45%	72.83
FORT MYERS-NAPLES	0.27%	71.96
Total	100.00%	100.00

Report prepared by H2R Market Research
Based on 15208 data points

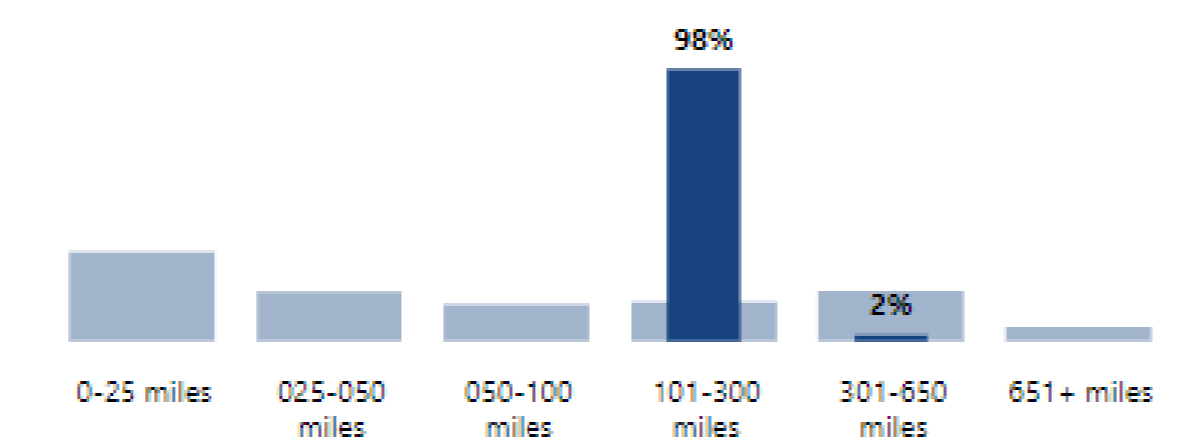
Length of Stay



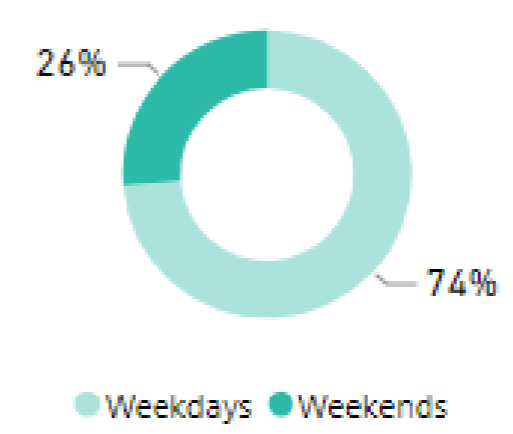
Points of Interest Market Share



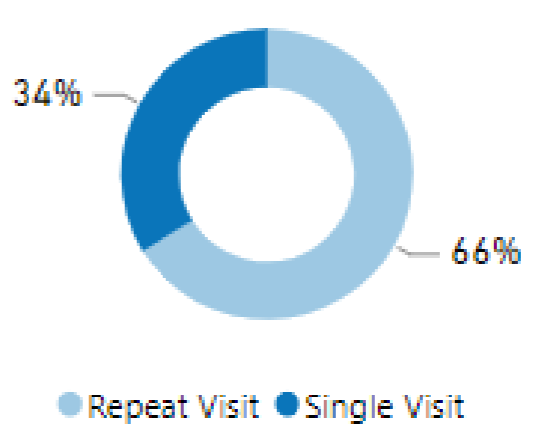
Visitation by Distance



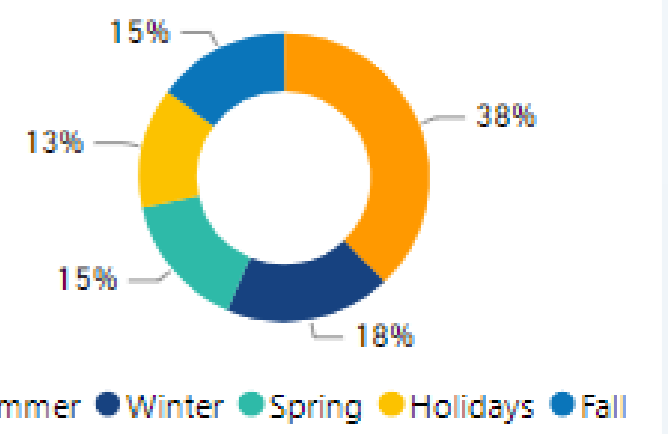
Weekends vs. Weekdays



Repeat vs. Single Visits



Visitation by Season



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



Cumberland County, NC 2019 Visitation Trends

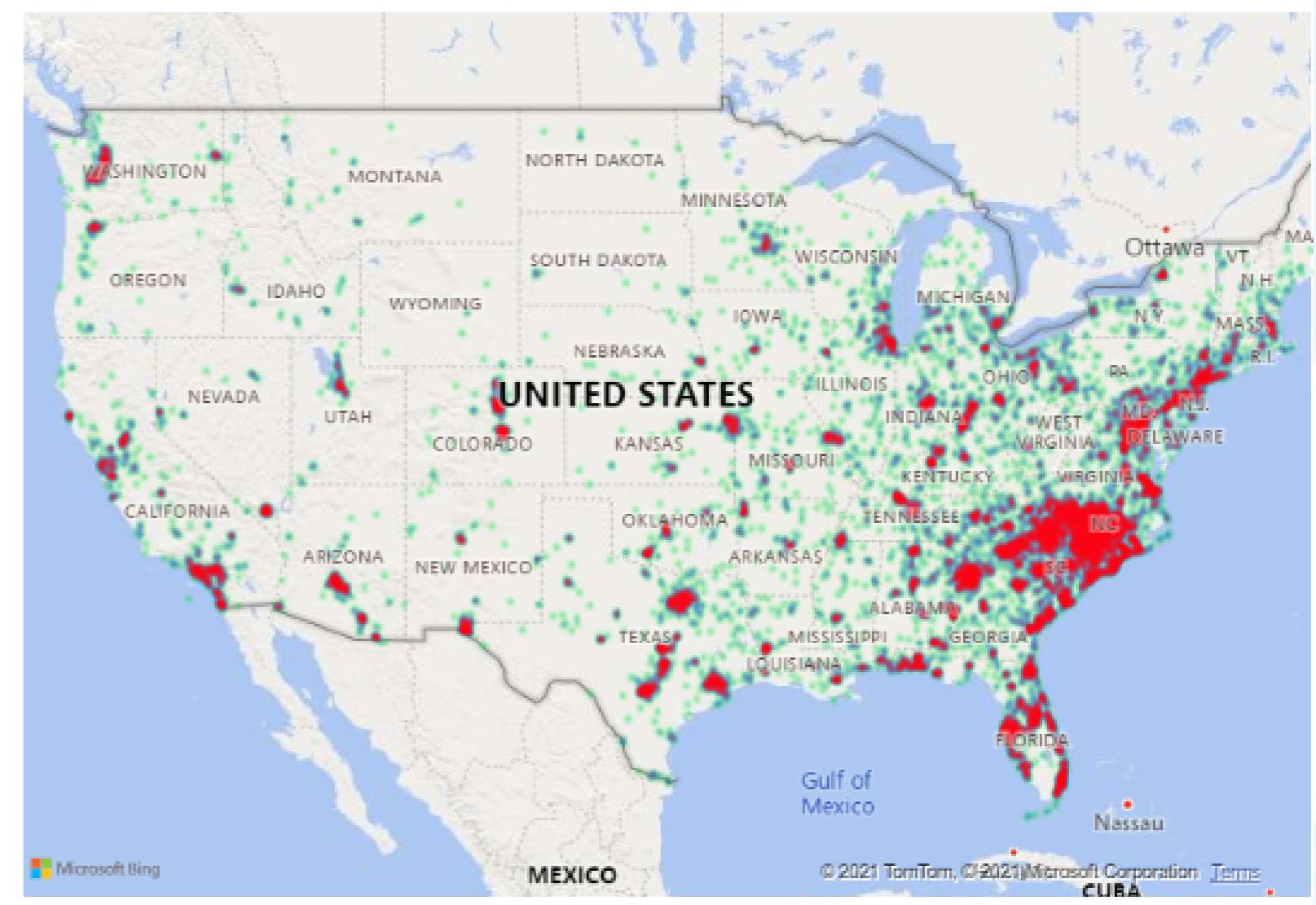
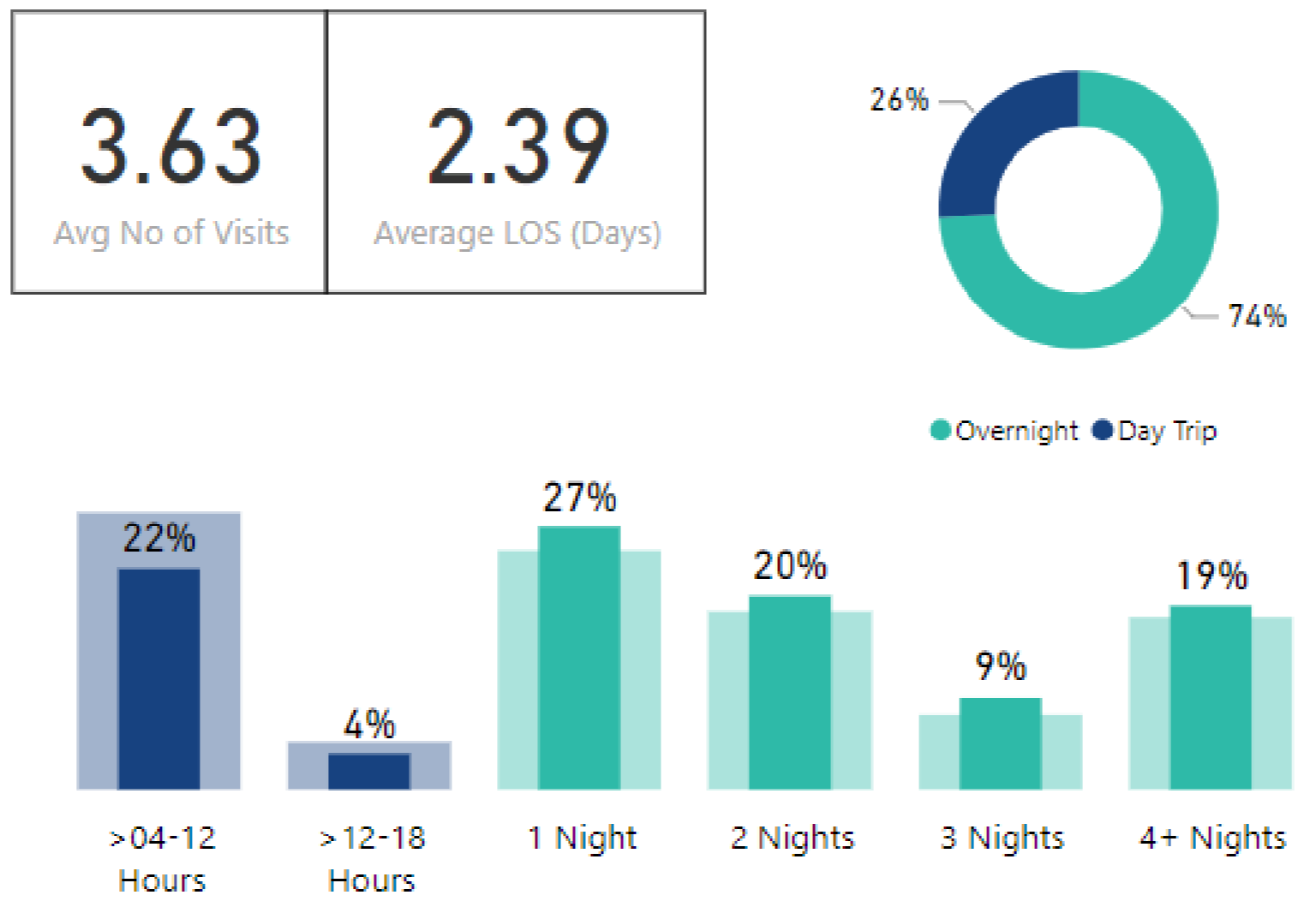
The Cumberland County, NC Scout Report contains 1,281,485 domestic data pings that entered the geofence around Cumberland County, NC in 2019. These pings do **not** include those who live or work in the geofence, nor those who were in the geofence for less than 4 hours.

DMA	%	BDI
RALEIGH-DURHAM	68.44%	7,449.94
MYRTLE BEACH-FLORENCE	1.89%	779.98
WILMINGTON	0.69%	482.43
GREENVILLE-NEW BERN-WASHINGTON	0.77%	302.02
DOTHAN	0.24%	296.37
COLUMBUS, GA	0.53%	293.75
SAVANNAH	0.64%	225.03
WATERTOWN	0.18%	221.61
GREENSBORO-HIGH POINT-WINSTON SALEM	1.11%	198.93
ALEXANDRIA, LA	0.20%	183.93
CHARLOTTE	1.71%	180.91
AUGUSTA	0.38%	174.59
COLUMBIA, SC	0.80%	171.52
FAIRBANKS	0.06%	167.60
EL PASO	0.48%	148.32
WICHITA FALLS-LAWTON	0.20%	144.72
COLORADO SPRINGS-PUEBLO	0.41%	140.28
WACO-TEMPLE-BRYAN	0.42%	134.97
MOBILE-PENSACOLA	0.57%	131.75
ANCHORAGE	0.18%	130.69
NORFOLK-PORTSMOUTH-NEWPORT NEWS	0.76%	124.22
CHARLESTON, SC	0.41%	117.65
PANAMA CITY	0.12%	99.82
NASHVILLE	0.84%	99.73
GREENVILLE-SPARTANBURG-ASHEVILLE	0.65%	93.49
RICHMOND-PETERSBURG	0.42%	93.32
CHARLOTTESVILLE	0.06%	78.68
WASHINGTON, DC-HAGRSTWN	1.29%	63.20
SAN ANTONIO	0.45%	58.22
SPRINGFIELD, MO	0.26%	54.05
HUNTSVILLE-DECATUR-FLORENCE	0.17%	53.68
HONOLULU	0.23%	52.01

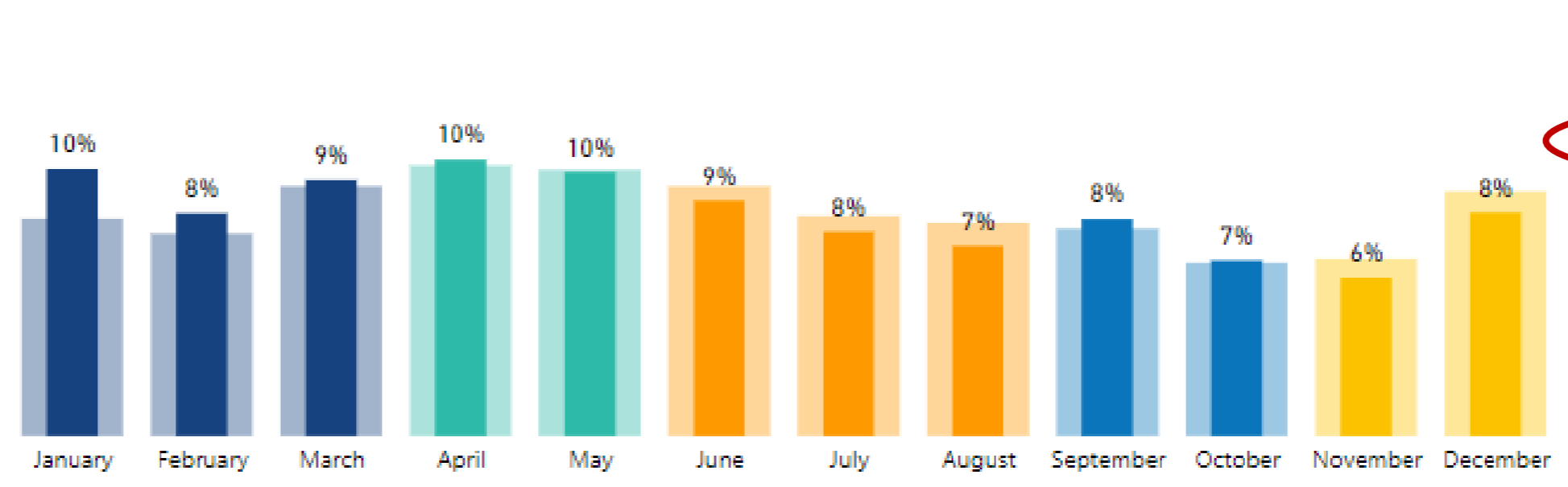
Report prepared by H2R Market Research
Based on 153144 data points

Total 100.00% 100.00

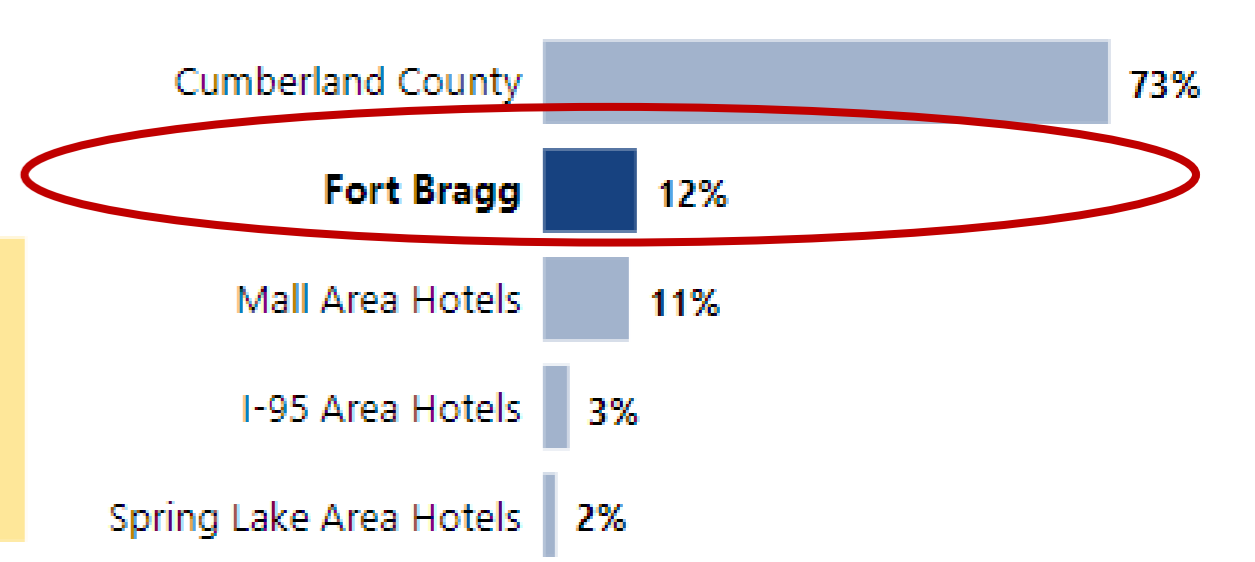
Length of Stay



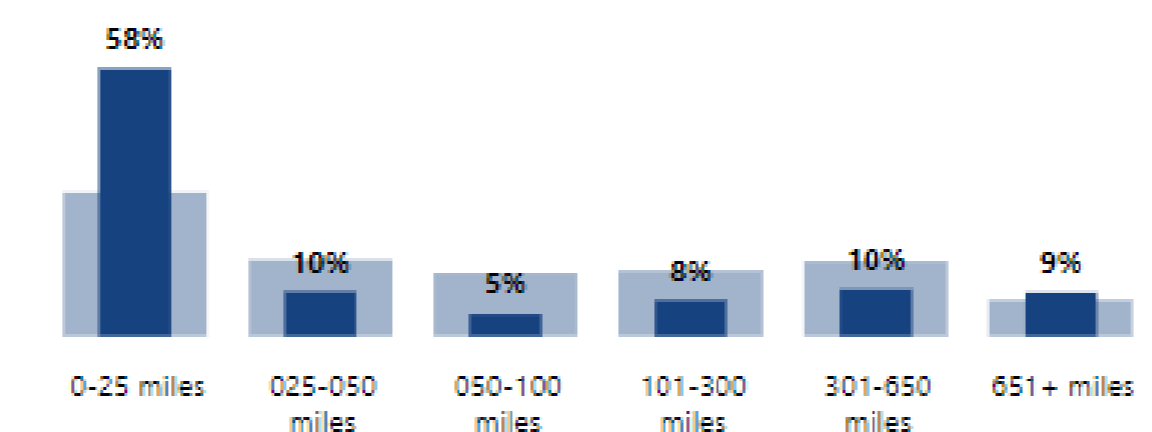
Visitation by Month



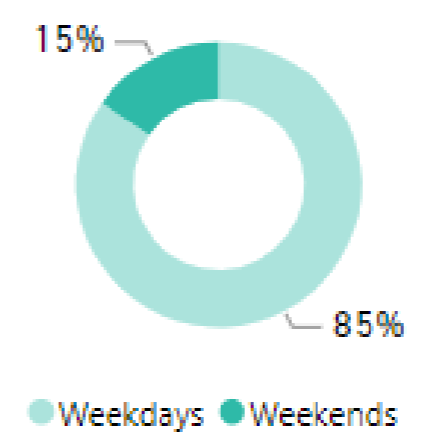
Points of Interest Market Share



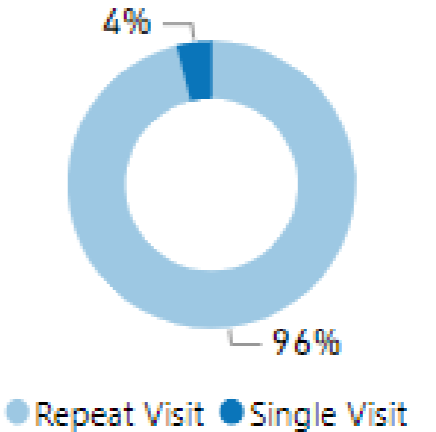
Visitation by Distance



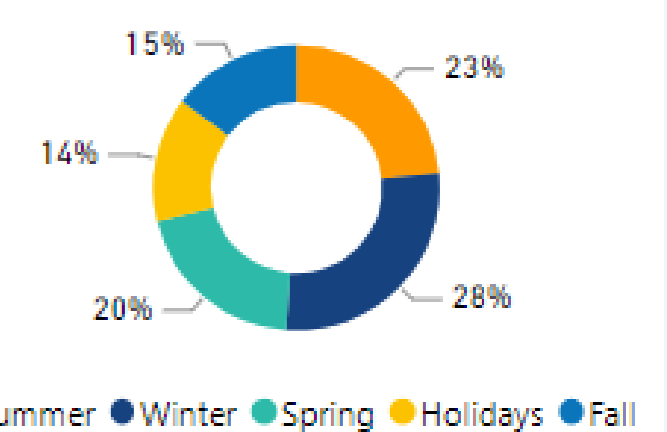
Weekends vs. Weekdays



Repeat vs. Single Visits



Visitation by Season



So what?

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



Phase 3

Tourism Market Study



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

Journey Toward the Next Normal

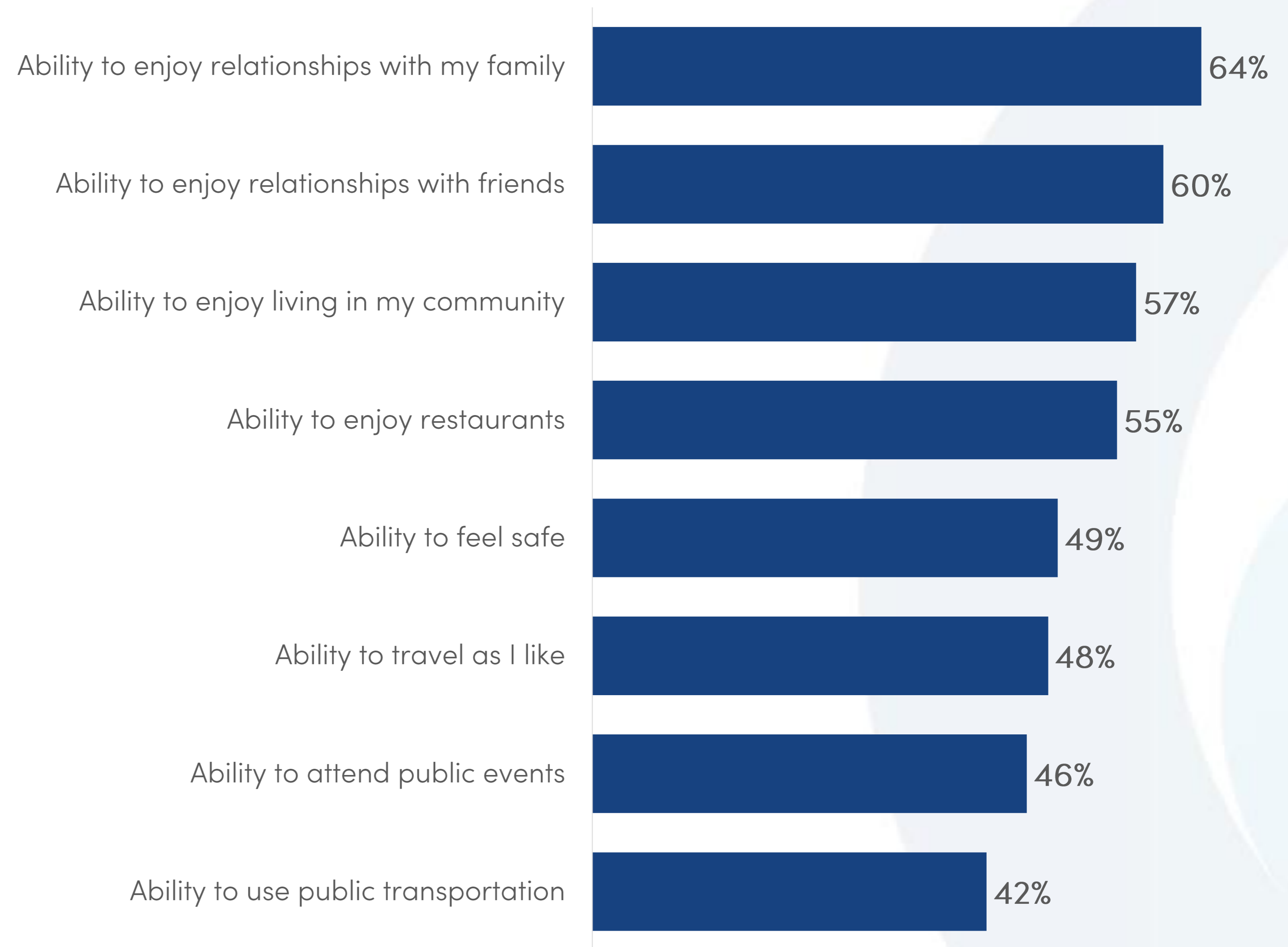
Traveler Sentiment

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. Across various aspects of life, 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%), enjoy 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 normal.

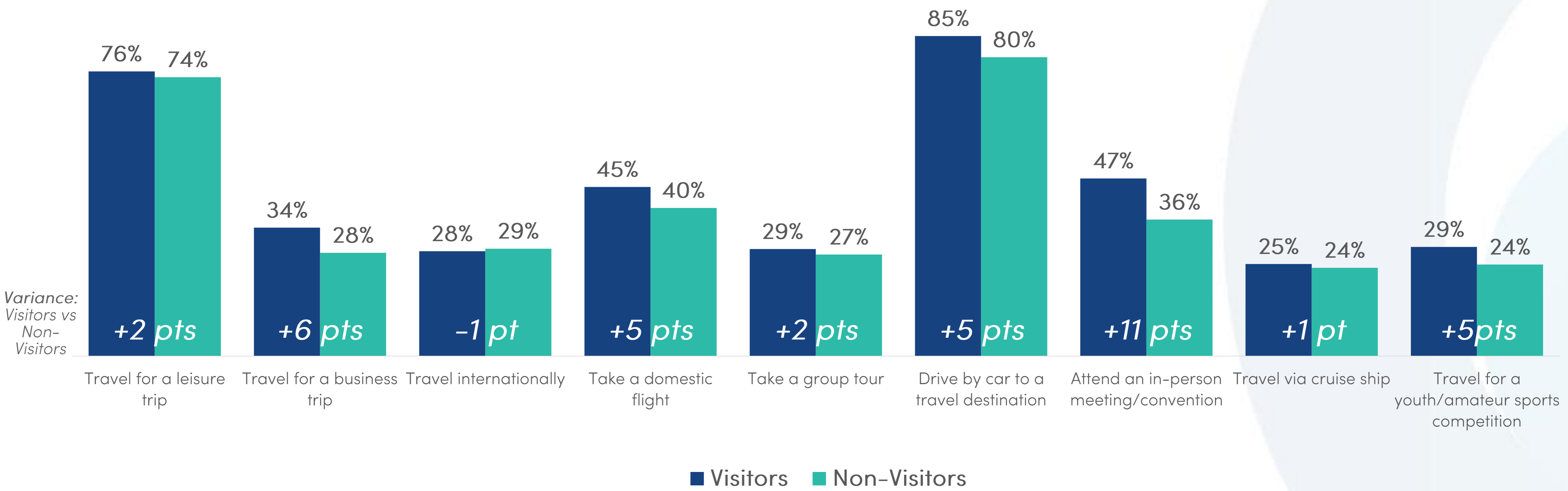
% Approaching/Already Completely Normal



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.?

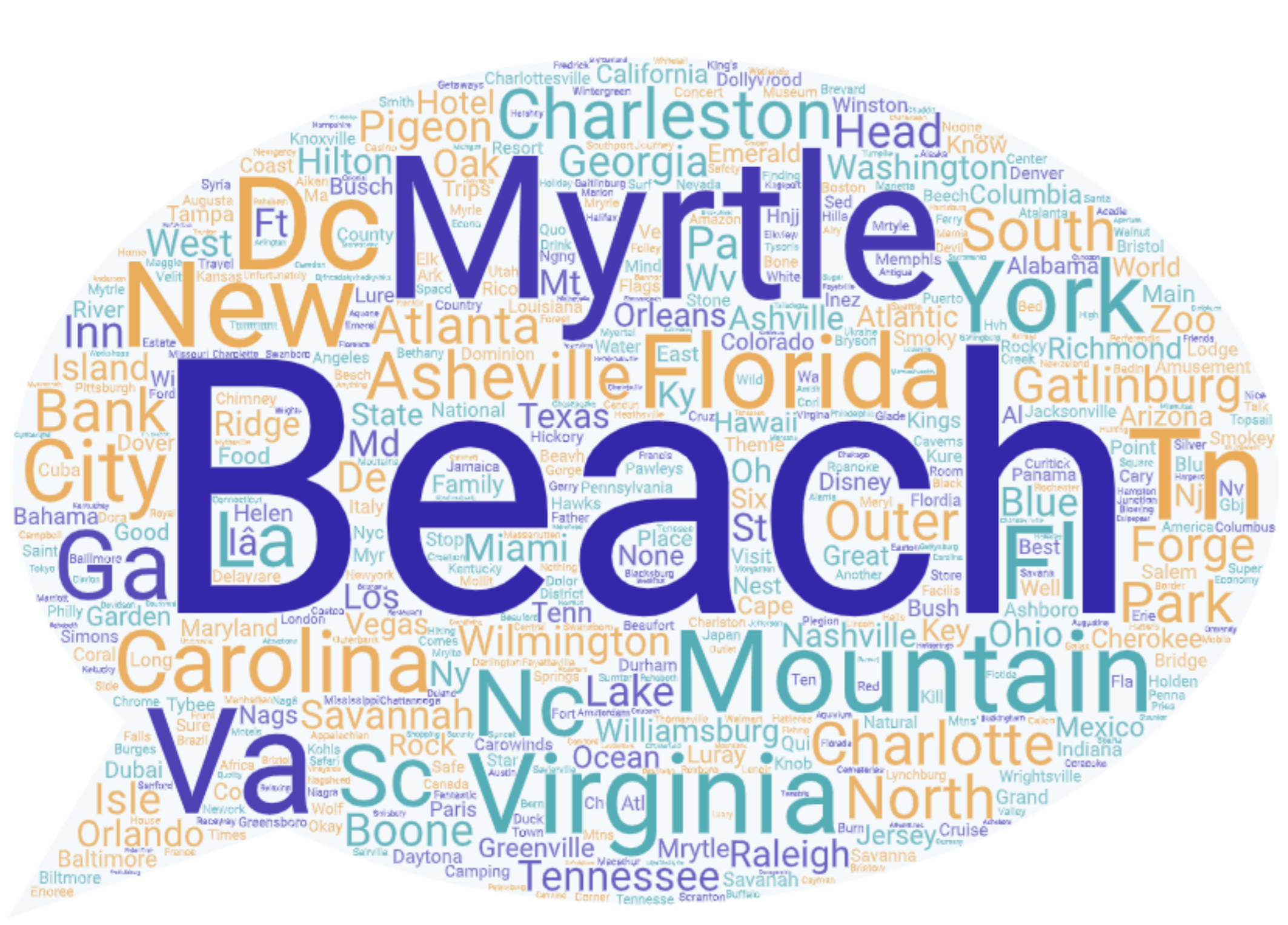
More than three-quarters of regional travelers plan to travel for leisure in 2022 and primarily by car. However, select types of travel (business, international, group tours, cruise ships) all have levels of intent that run much lower.

2022 Travel Engagement
% Probably/Definitely Will



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

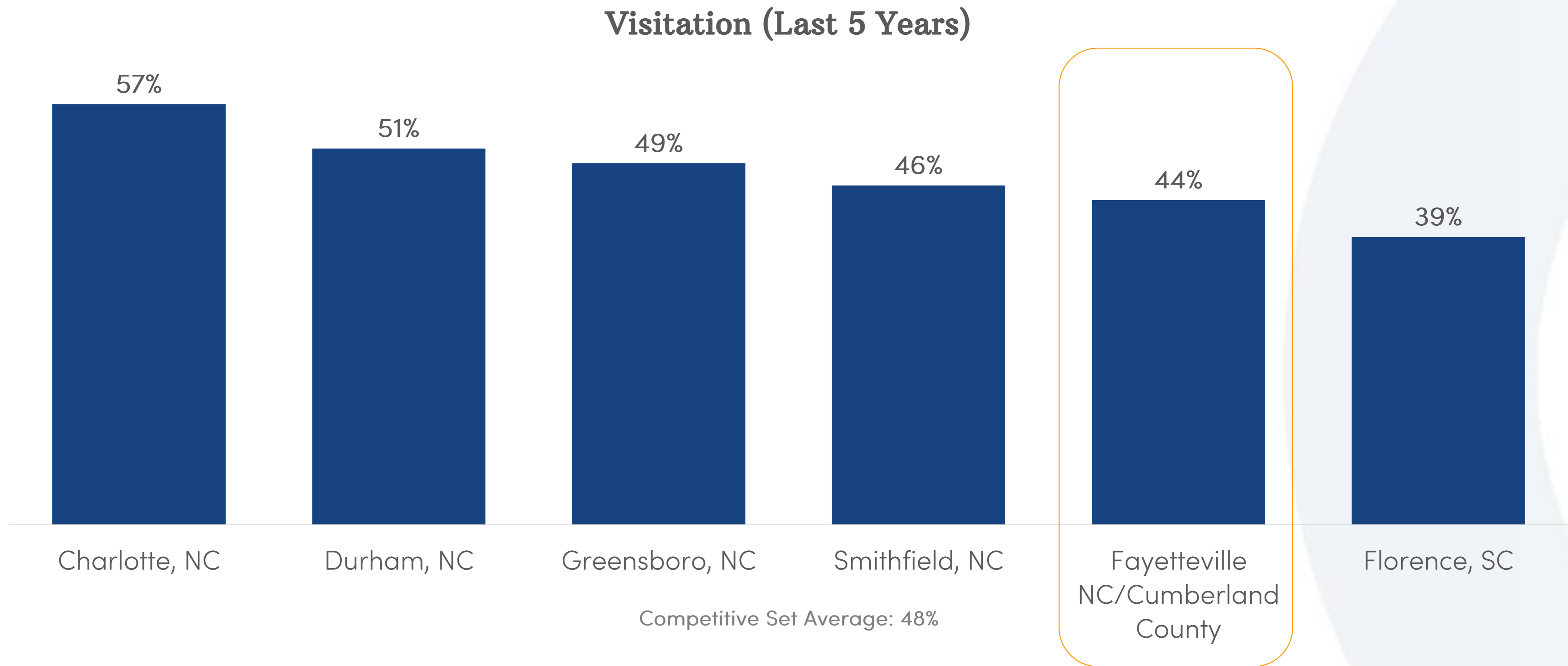
Fayetteville/Cumberland County is not a top-of-mind travel destination. Its level of unaided brand awareness is comparatively low, indicating it is not in most travelers' consideration sets.



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%

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

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).

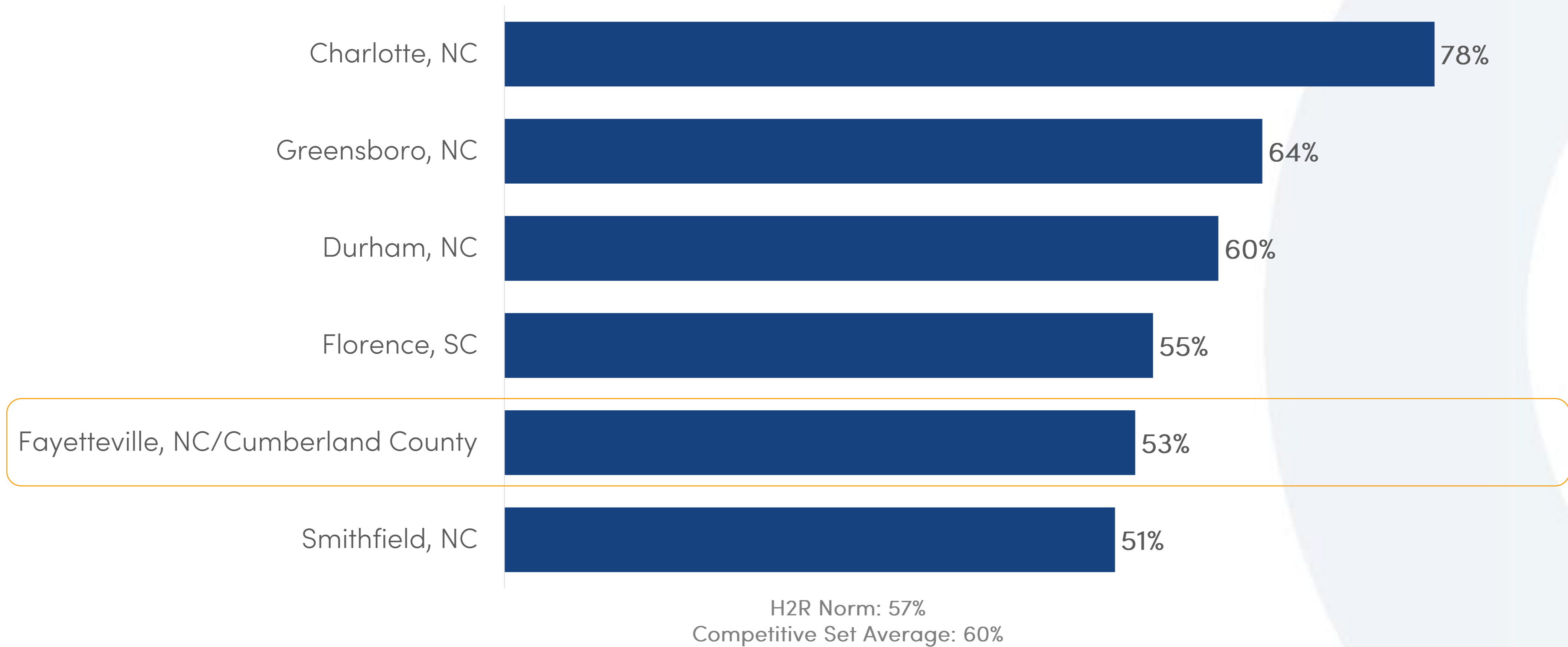


Q8: Please indicate your awareness and prior visitation to each of the following regional destinations.

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

While Fayetteville/Cumberland County's reputation is reasonably good, it trails almost every other competitive market in this study.

Opinion of Competitive Set Destinations
% Somewhat/Very Positive Opinion

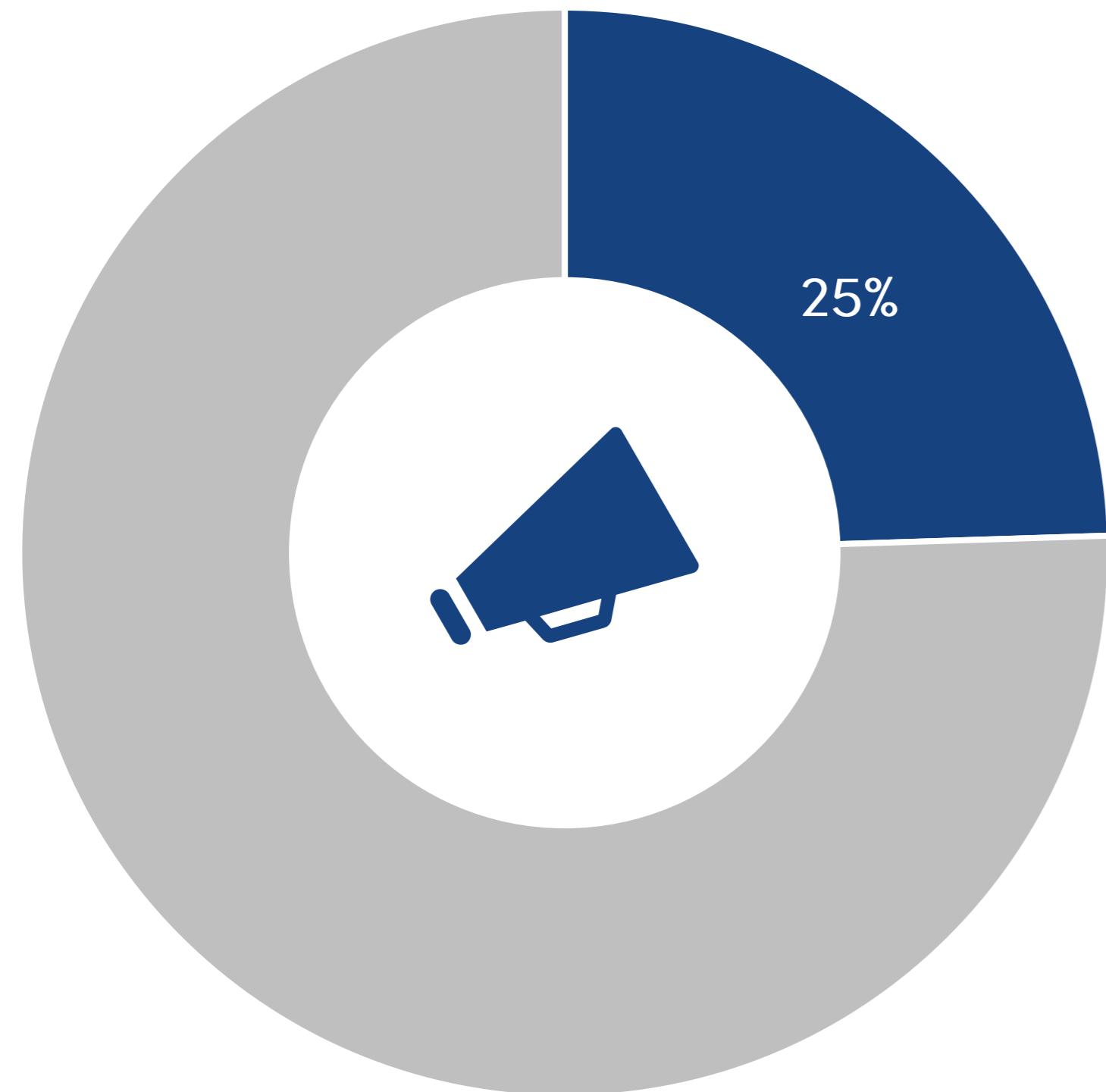


Q15: Please indicate to what degree your opinion of these destinations is positive or negative.

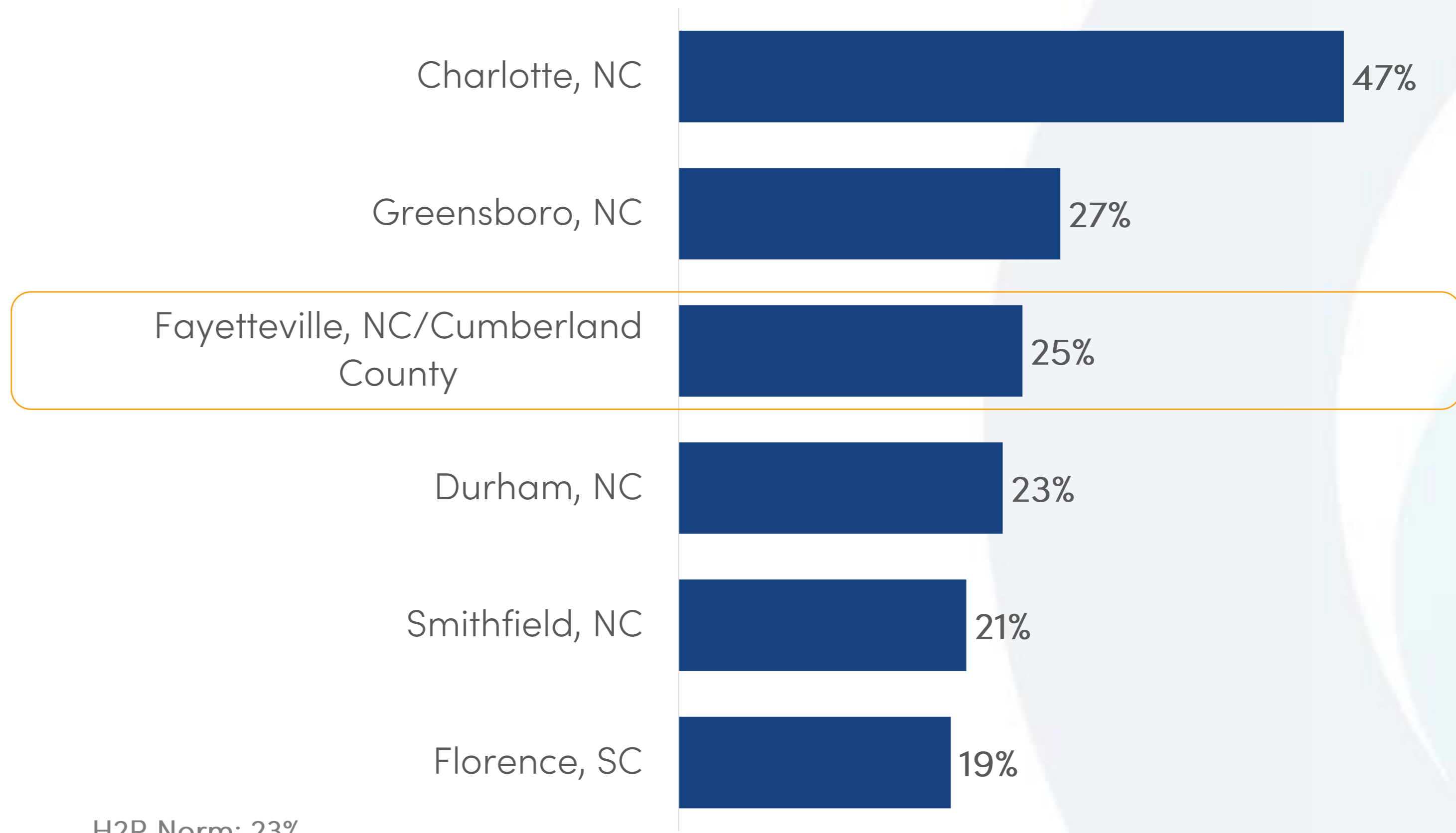
RESPONDENT BASE: RESPONDENTS FAMILIAR WITH EACH DESTINATION | N= VARIES BY DESTINATION

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 Share of Voice
% Seen/Heard Destination Ads



Competitive Destinations



H2R Norm: 23%
Competitive Set Average: 27%

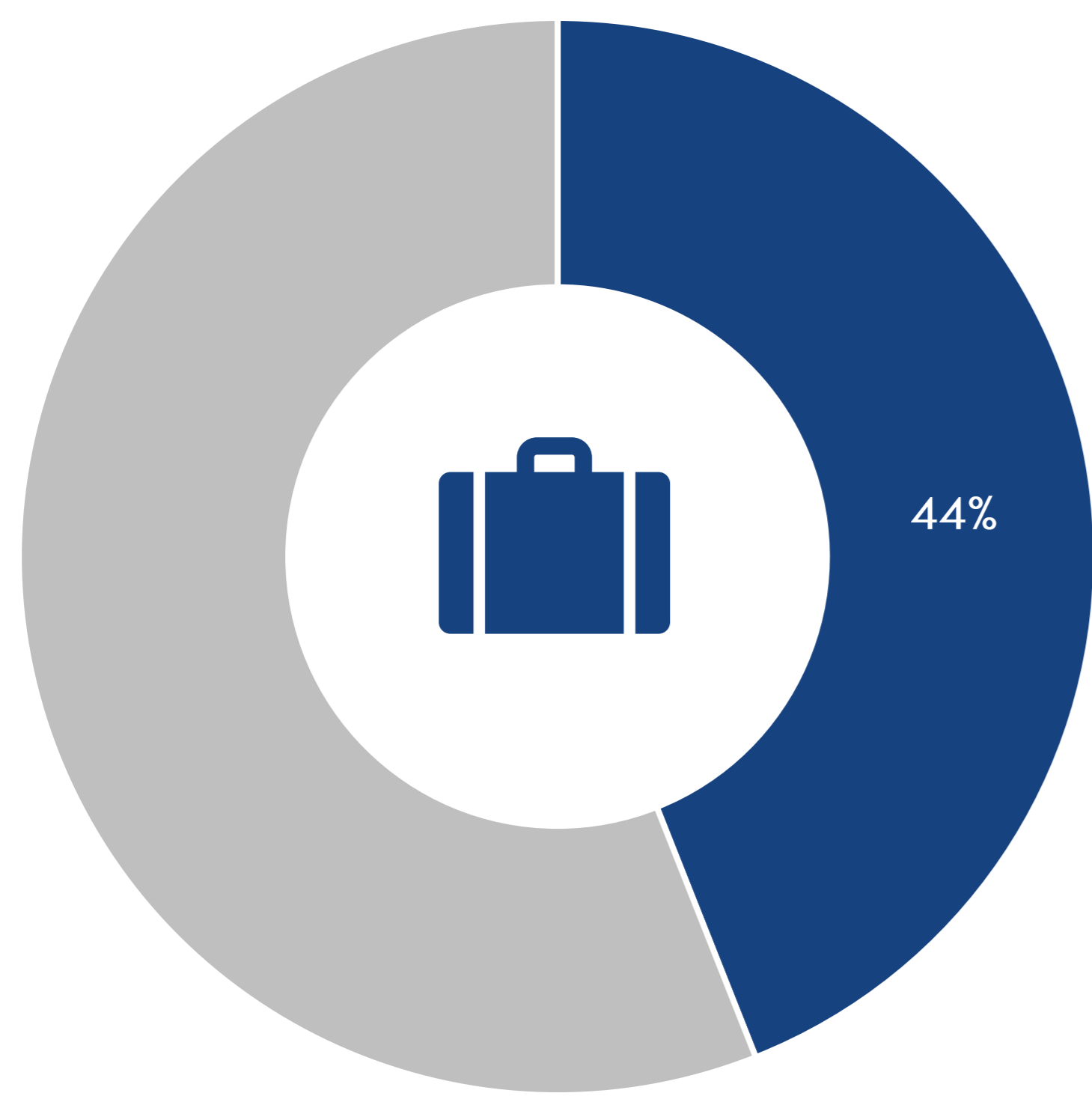
Q16: Which of the following destinations have you seen advertising for in the past 6 months?

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

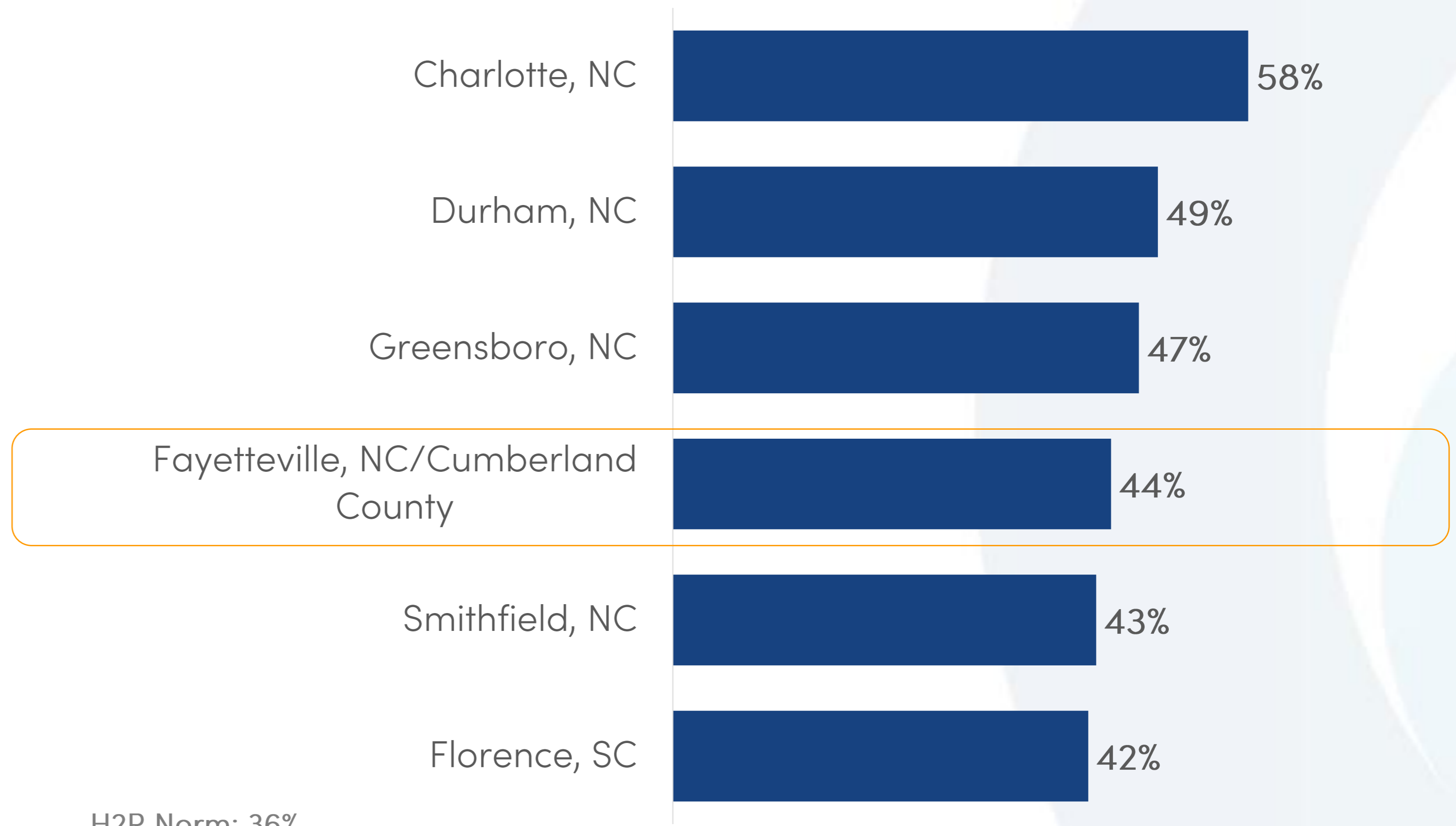
Intent to visit Fayetteville (44%) is also slightly lower than average among the destinations in the competitive set (47%).

Intent to Visit Fayetteville

% Probably/Definitely Will Visit



Competitive Destinations



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

Compared to regional competitors of comparable size and scope, Fayetteville/Cumberland County prospects feel the area is most differentiated by Patriotism.

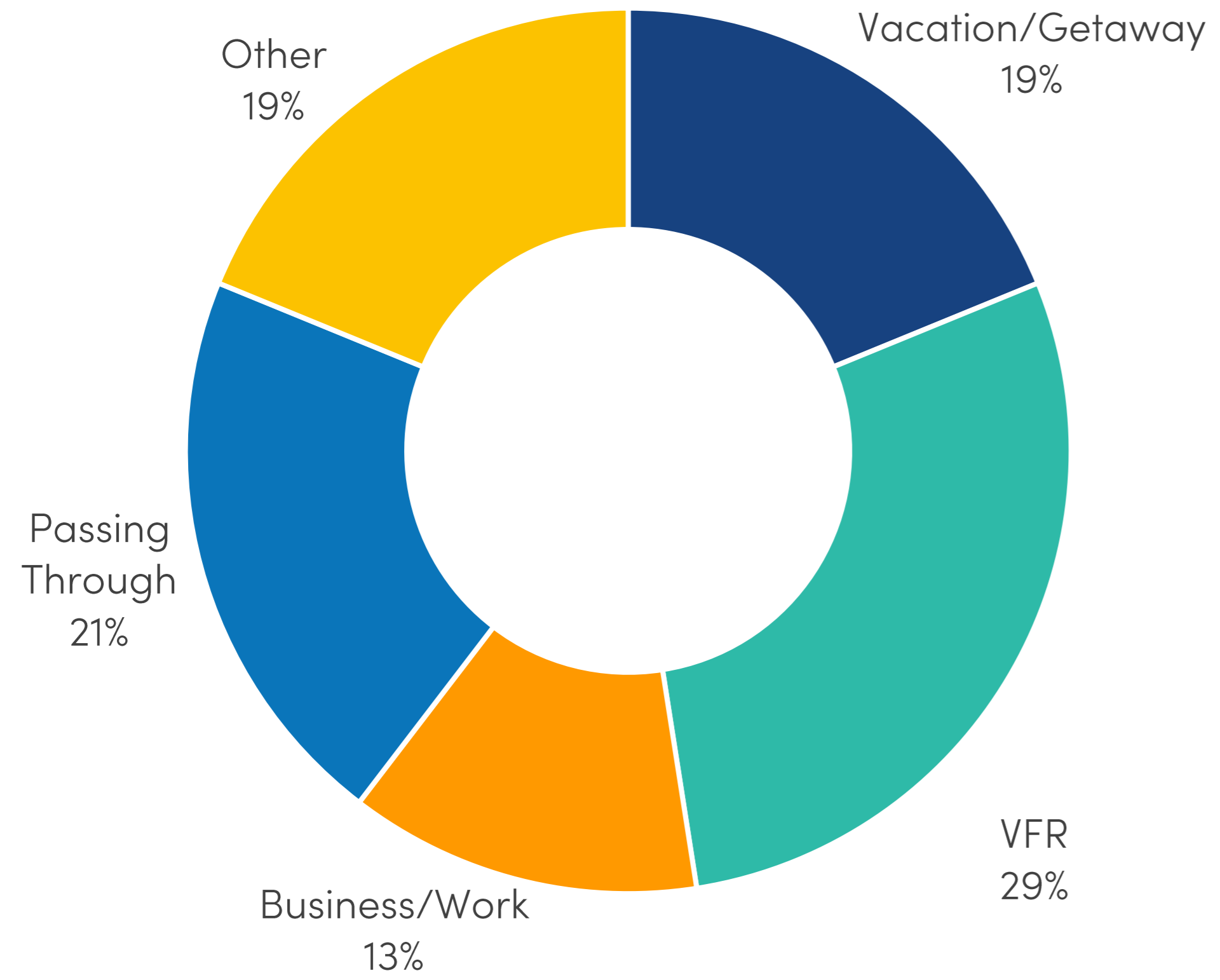
Brand Differentiators	Fayetteville, NC/ Cumberland County	Durham, NC	Smithfield, NC	Charlotte, NC	Florence, SC	Greensboro, NC	Average
Charm	79	95	115	112	90	83	95
Inviting Downtown	77	126	25	173	54	138	99
Spectator Sports	99	142	82	196	0	71	98
Museums	86	122	122	160	64	74	105
Patriotism	176	59	107	105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

Q18: In your opinion, which of the following destinations has a good reputation for having...?

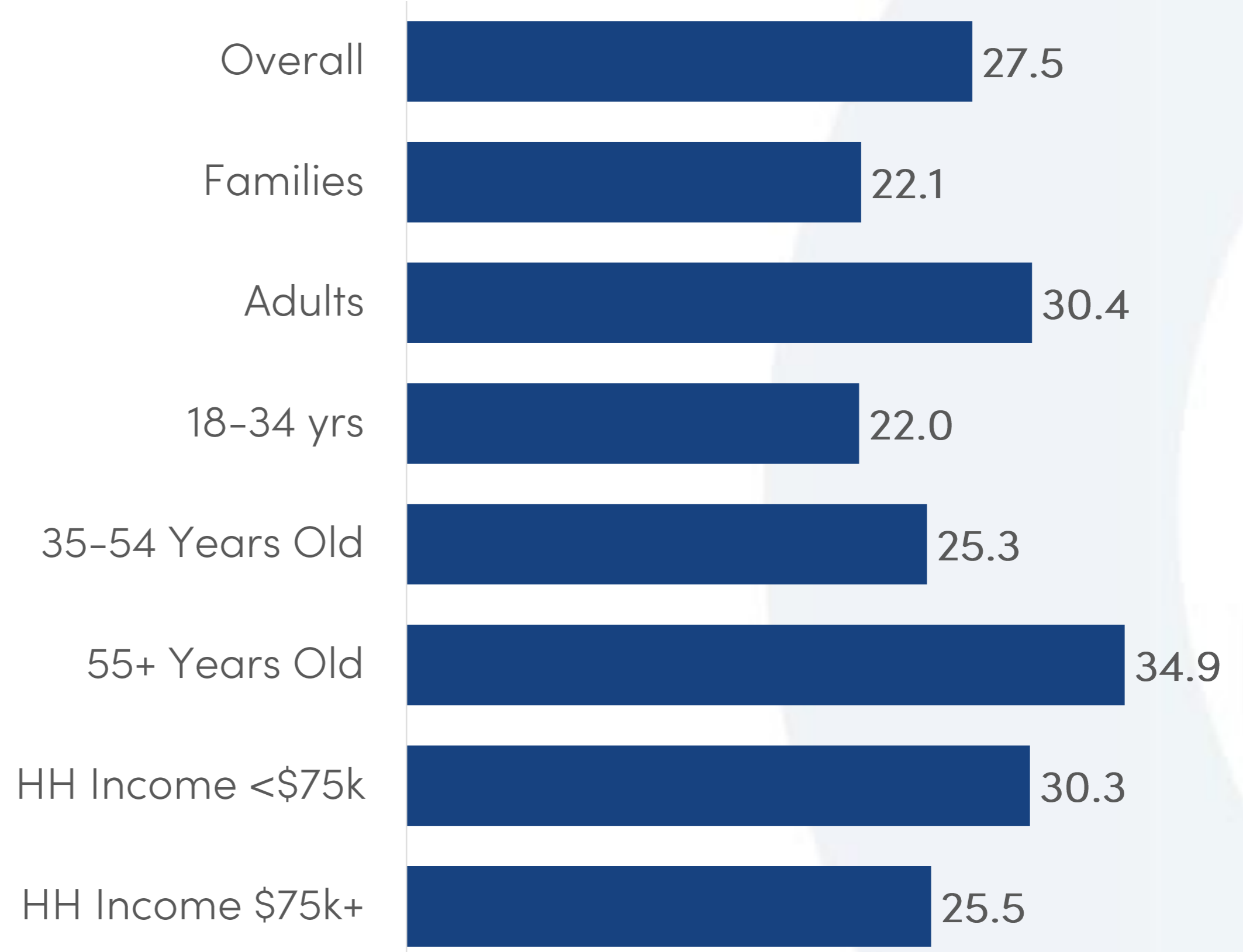
RESPONDENT BASE: RESPONDENTS FAMILIAR WITH EACH DESTINATION | N=VARIES BY DESTINATION

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



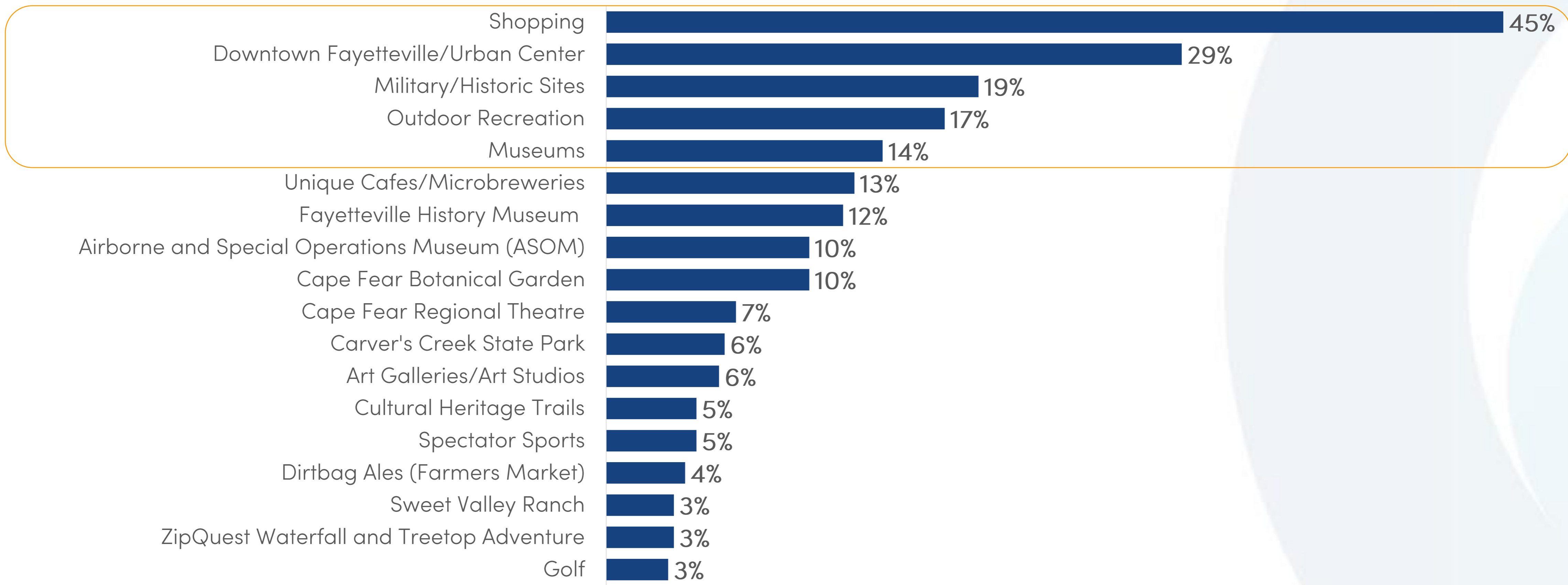
Decision Time (Avg No. of Days Required)



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?

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






Activities Engaged In
Select All That Apply



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

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

Top Five Functional Drivers of Visitation

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



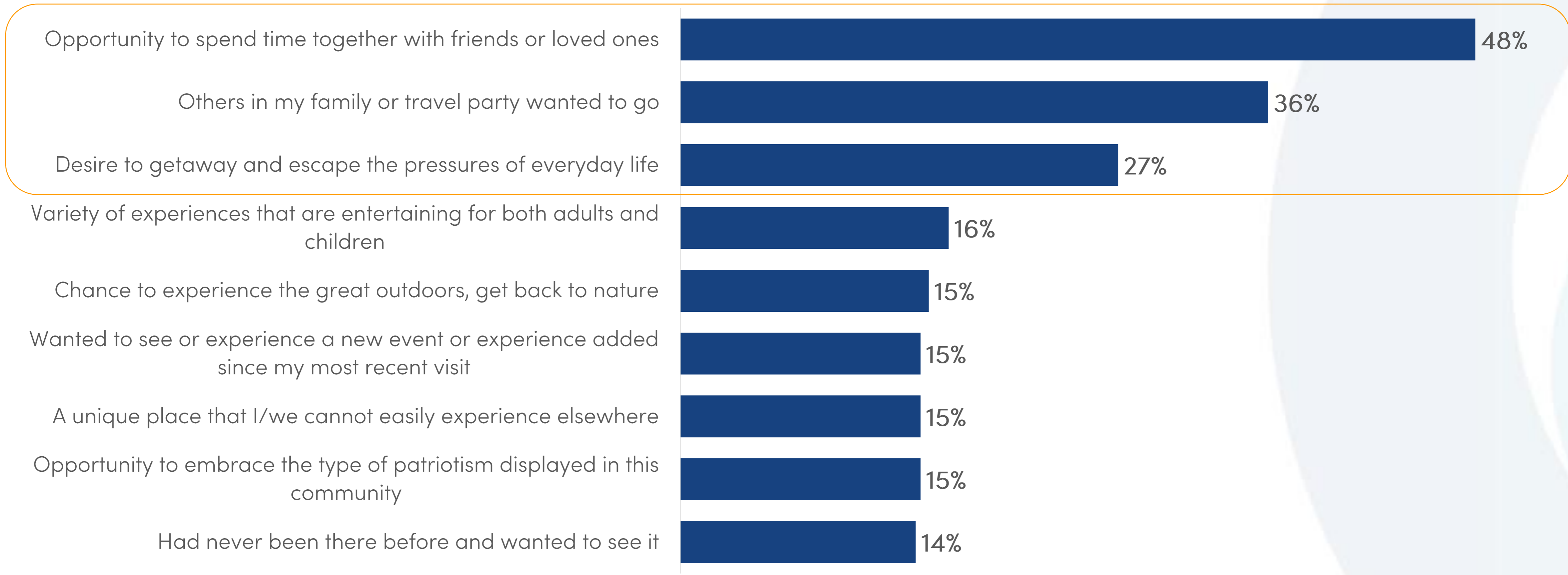
Q27: Which of the following were a major influence in your decision to visit Fayetteville NC/Cumberland County on this same visit?

Geolocation intelligence applied to select POIs in Fayetteville/ Cumberland County indicate the preponderance of their collective visitation (71%) is generated from residents while only 29% is 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

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

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.

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



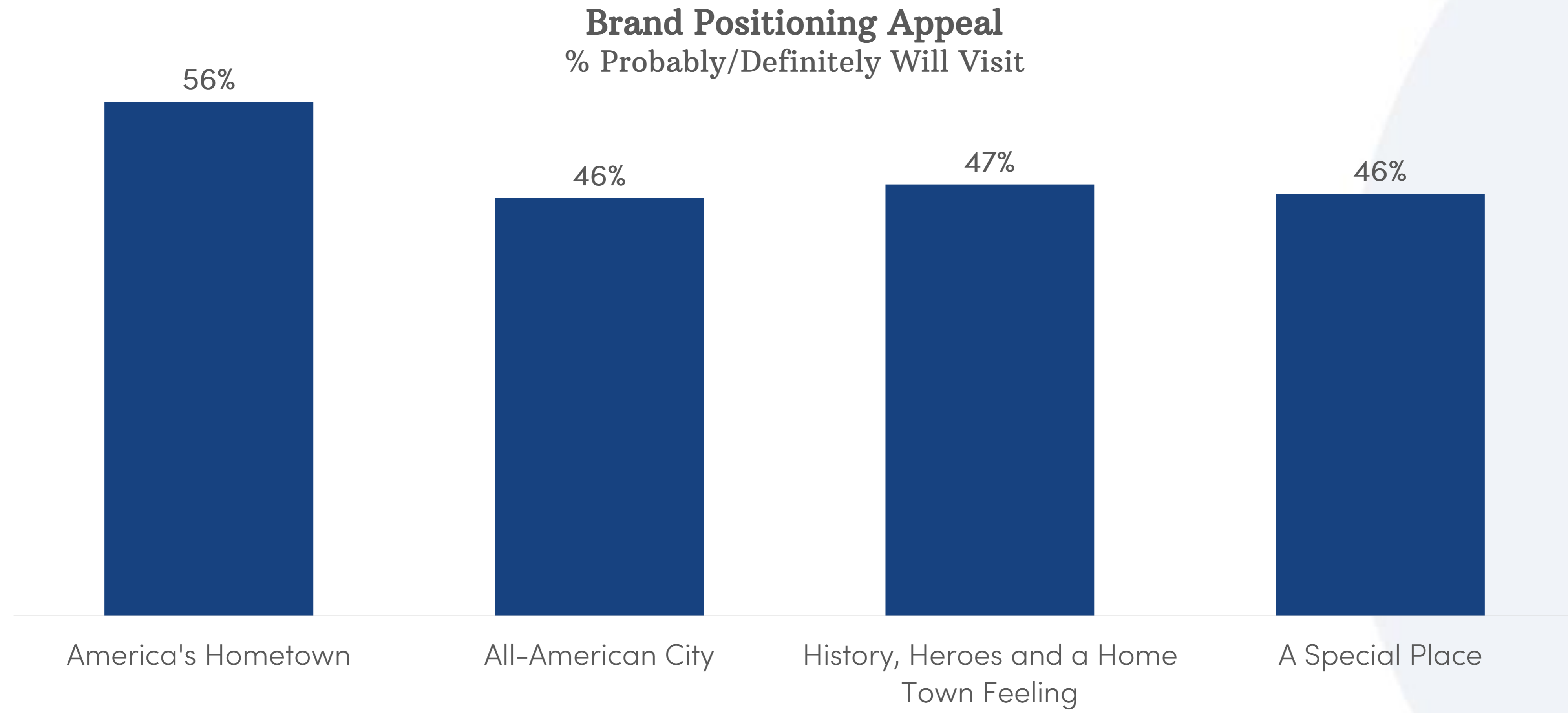
Per Person Trip Spending \$201 (\$111 per person per day)

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.

America's Hometown is the preferred brand position among regional travelers and the other three all cluster together in a distant second place.



Q37: 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.

Non-Visitors' Derived Barriers, or those that correlate most closely with low intent, reveal that no "must sees," other places are preferred and a lack of interest are the biggest impediments to visitation.

STATED BARRIERS

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

DERIVED BARRIERS

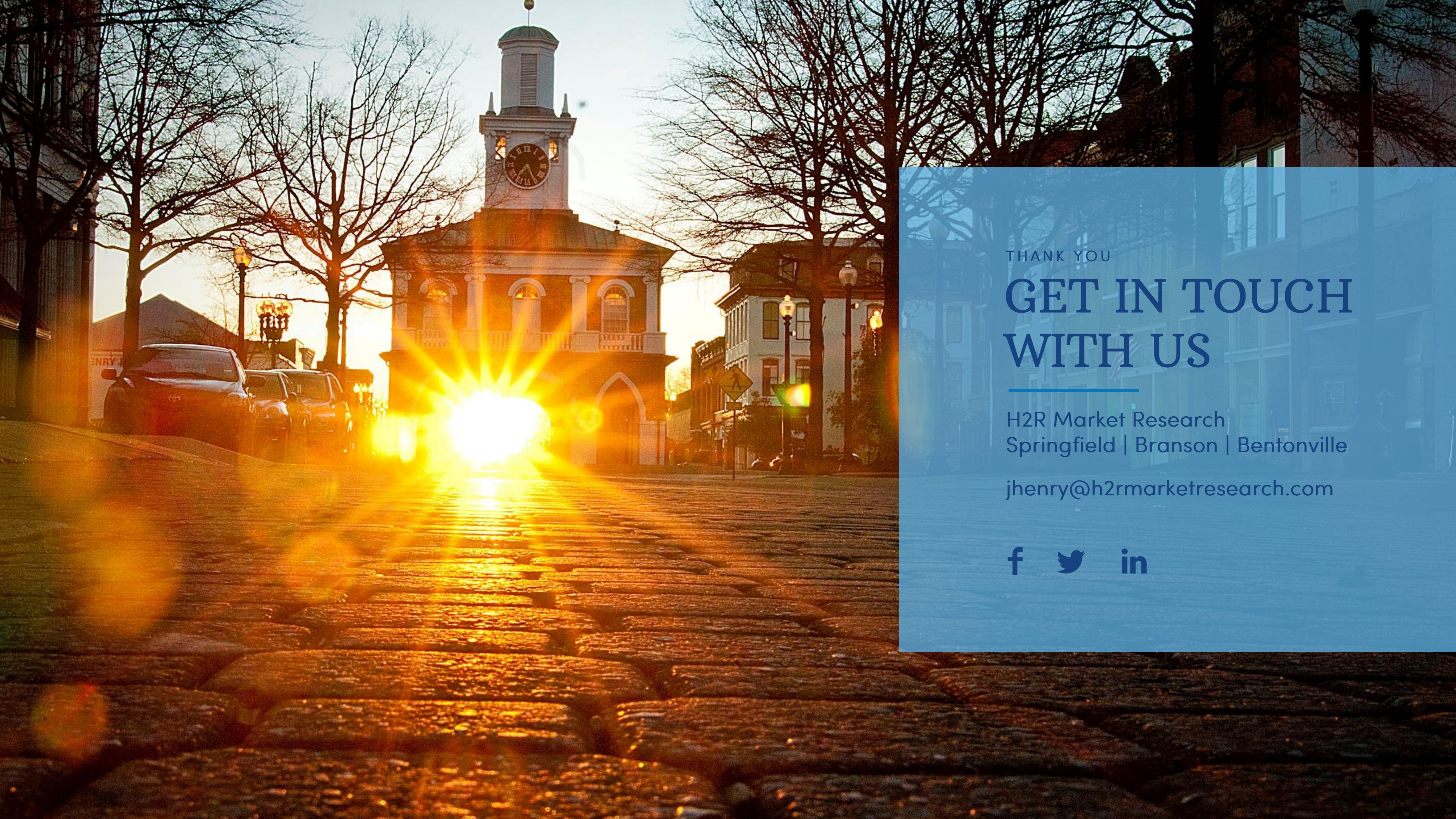
1. No "must sees" that are compelling me to visit
2. Have other places that I prefer to visit
3. Not for me/not interested in this destination
4. Just never comes to mind
5. Nothing new of interest that I would like to experience
6. Have not had anyone recommend it to me
7. Things to do in this destination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

Summary

- **Research-driven marketing** will make the destination and the FACVB more competitive, successful and efficient because all major decisions are grounded in consumer truths.
- **Background.** We have aligned with local stakeholders, determined precisely which markets are driving Fayetteville/Cumberland County tourism and have begun “peeling back the onion” to learn about area visitors at a much deeper level.
- **COVID changed everything.** It changed travelers’ attitudes, beliefs and behaviors. It disrupted habits in ways few other events have managed to do. Regional travelers remain far “normal” even as those habits slowly begin to be rebuilt. And that just may provide the opportunity Fayetteville/Cumberland County needs to pivot and reset its travel brand.
- **Nearly a third remain hunkered down.** Many regional travelers remain hunkered down waiting for the danger to pass; fortunately, leisure and regional car travel appear to be rebounding much more quickly than other types of travel.
- **Not a top-of-mind destination.** While travelers across the trade area have begun considering travel again, very few include Fayetteville/Cumberland County in their consideration set.
- **Lower key performance indicators than competitors of similar size and scope.** In fact, Fayetteville/Cumberland County’s market share, reputation, share of voice and level of intent to visit are all below average compared to the competitive set.
- **Military town.** This is likely because regional travelers tend to view Fayetteville/Cumberland County as a nice, historic military town. It is also considered fun, friendly, beautiful and interesting.

Summary

- **Not a travel hub.** Fayetteville/Cumberland County is not a place travelers often visit for leisure or business travel. In fact, even the area's most prominent points of interest are comparatively general in nature – and, tourist attractions generate the majority of their visitation from residents. This likely explains in part why more Fayetteville/Cumberland County travelers visit the area to see friends/relatives (VFR), on personal business or are passing through than visit on vacation or a getaway weekend.
- **Differentiated by Patriotism.** Fayetteville/Cumberland County is not perceived as being very well differentiated by its inviting downtown, charm, museums or even spectator sports as much as it is differentiated by Patriotism. The area owns “patriotism.” But, so far, that does not appear to be connected in any meaningful way to tourism.
- **Economic driver for the community.** Regardless why they visit the area, regional travelers do spend quite a bit of money in the Fayetteville/Cumberland County area. The average leisure visitor party spends \$877 (or \$109 per person per day) and the average business visitor party spends \$502 (or \$171 per person per day). Even the average VFR party spends \$489 (or \$77 per person per day). All travelers deliver value to the area, and more is better.
- **Barriers to visitation.** Some of the reasons why regional travelers indicate they haven't visited Fayetteville/Cumberland County is that there are not many “must sees,” it never comes to mind or they have not had anyone recommend it (along with a preference for other places they'd rather visit). The good news is that most of these are fixable.



THANK YOU

GET IN TOUCH WITH US

H2R Market Research
Springfield | Branson | Bentonville

jhenry@h2rmarketresearch.com

