

FACVB Traveler Sentiment Longitudinal Study

Prepared for FACVB

Delivered May 2024

THE CLOSEST TO THE CUSTOMER WINS.



Project Overview

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

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

Sample. A total of 200 responses are being collected from this general population panel every two months throughout FY 2024 which will result in a total sample of 1,200. This size of sample will provide for a maximum margin of error of +/-2.8% at a 95% confidence interval.

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02. Market Landscape	Pages 11 - 16
03. Behavioral & Demographic Insights	Pages 17 - 27
04. Other Key Findings	Pages 28 - 32

Key Takeaways

- **Intent to Travel.** Intent to travel within the next 12 months is high at 90%. Travelers indicated the highest intent for a leisure trip (75%), either overnight or day trip (72% vs. 68%), predominantly by car (70%) and within 6 hours away from home (61%). Business travel continues to earn the lowest intent of all travel types (20%).
- **Sources of Information.** Among all media channels, travelers are most inclined to remember impactful marketing messages when they originate from word of mouth, search engines or social media. And of all information sources, travelers most trust information coming from small business and official tourism bureaus.
- **Traveler Priorities.** Regional travelers seek out destinations that offer a variety of offerings and a safe and wholesome environment as well as destinations that provide an escape from everyday stressors, create memorable moments, and allow them to experience something they can't do regularly.
- **Fayetteville Visitation.** Three out of five previous Fayetteville visitors visited within the March to August timeframe (Spring – 33% or Summer – 27%). Previous visitors indicated strong satisfaction with value for the money they received in the area, with the average party spending just over \$700 during their stay.
- **Scenario Preferences.** Given a variety of scenarios, intent to travel was significantly less impacted by natural disasters, political protests and shark sightings than inflation rates, attraction wait times and the cost of gasoline.

01. Regional Traveler Mindset

N=1,000

02. Market Landscape

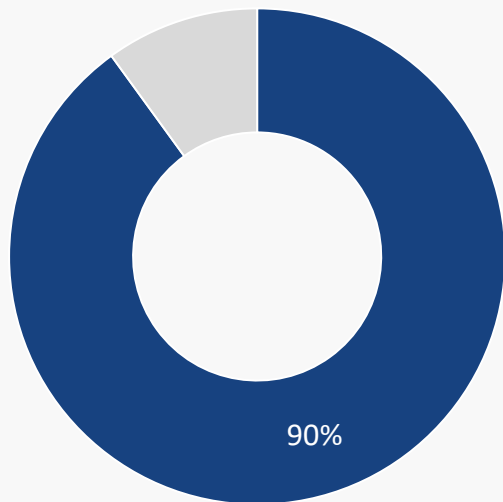
03. Behavioral & Demographic Insights

04. Other Key Findings

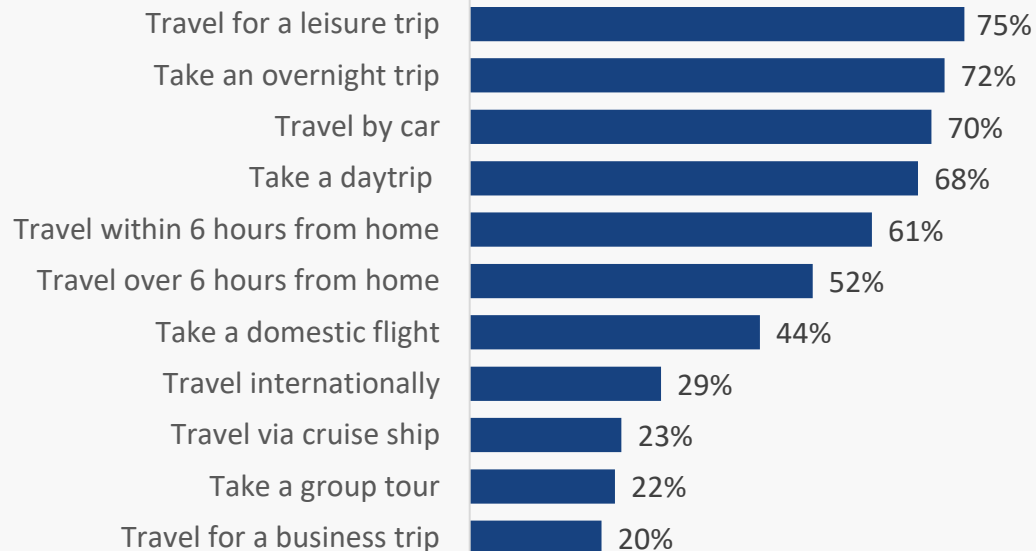
Nine out of ten regional travelers plan to travel in the next 12 months. And, most are planning leisure trips, especially overnight. Business trips continue to be slow to bounce back.

Intent to Travel in Next 12 Months

% Probably/Definitely Will

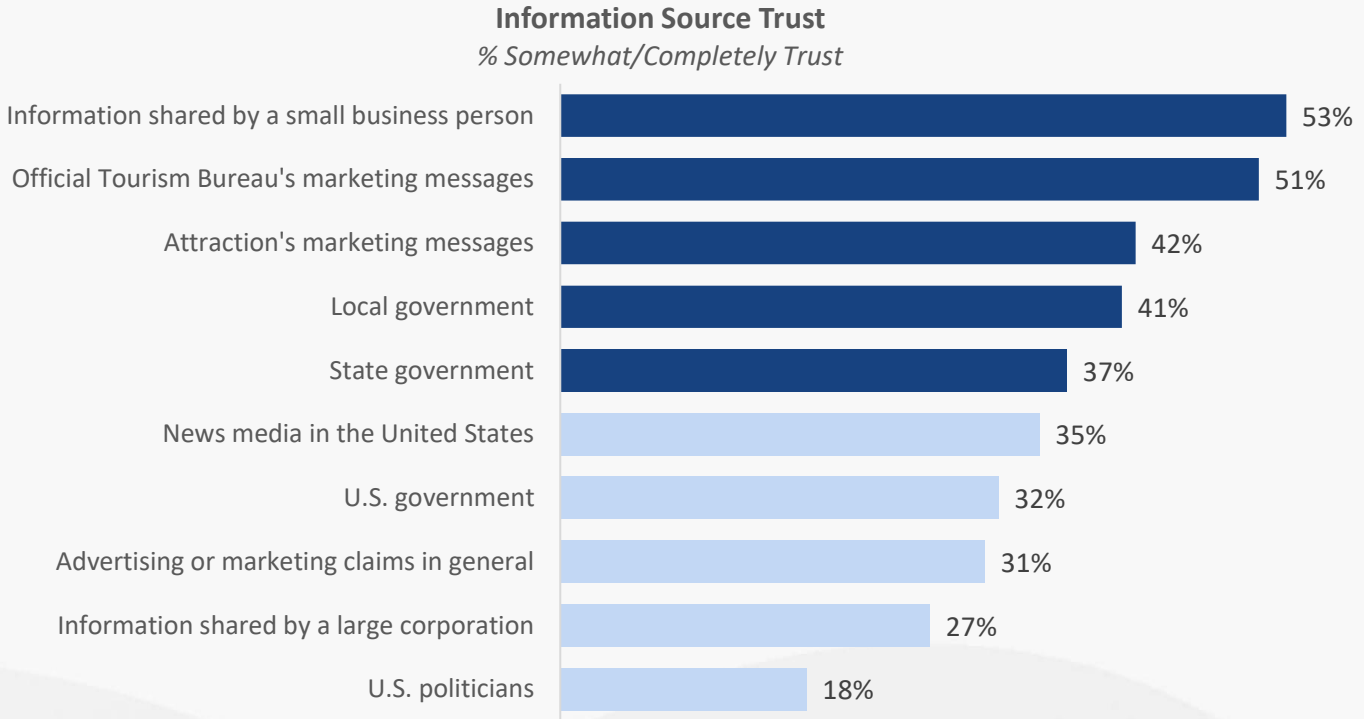


Intent by Travel Type



Please indicate how likely you are to take an overnight trip and/or trip of 50 miles or more in the next 12 months. 5-pt. scale
Using the scale provided, please indicate your intent to engage in each of the following types of travel in the next 12 months. 5-pt. scale

Travelers indicated that they are most likely to trust information shared by small businesses and local CVB's marketing. Very few people trust politicians, large corporations or advertising claims in general.



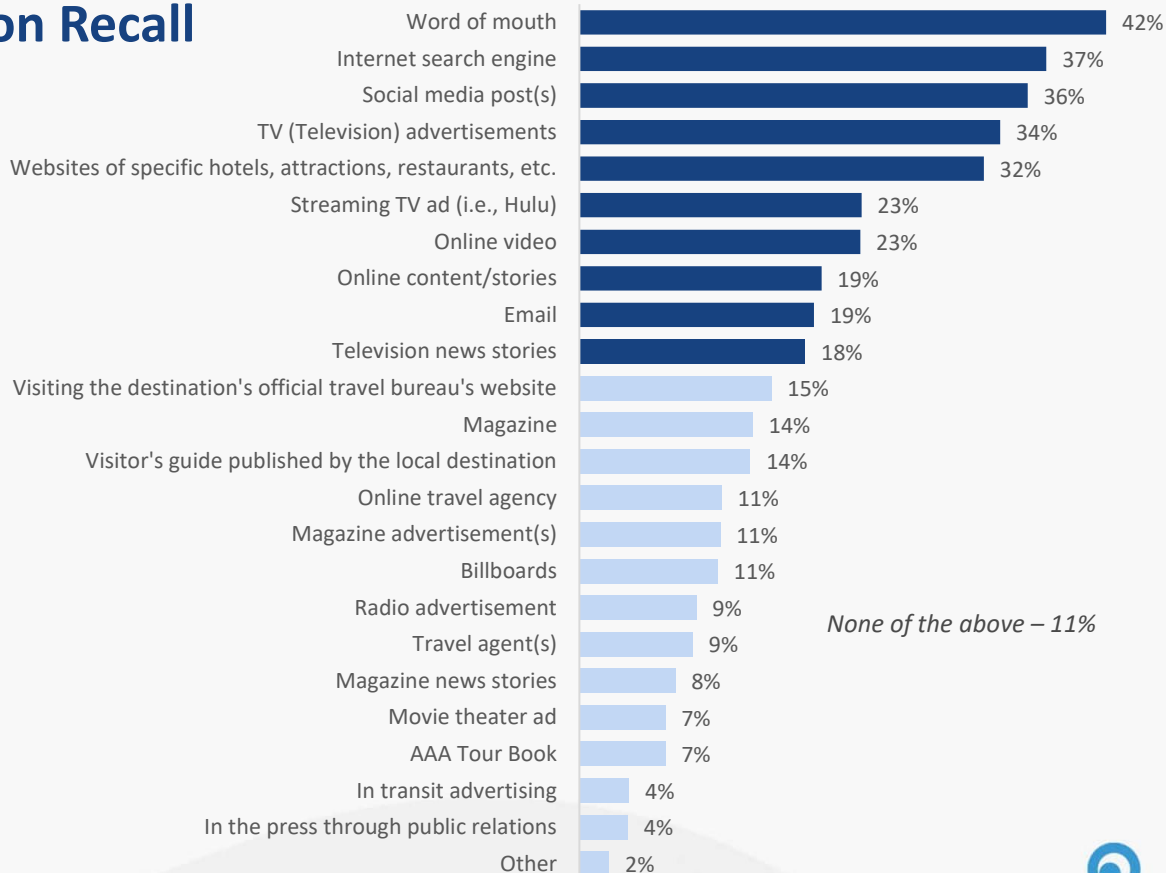
Using the scale provided, please indicate how much you trust each of the following sources of information. 5-pt. scale



Inspirational Communication Recall

Regional travelers indicated that word of mouth was by far the most influential communication when it came to deciding on a destination or attraction to visit.

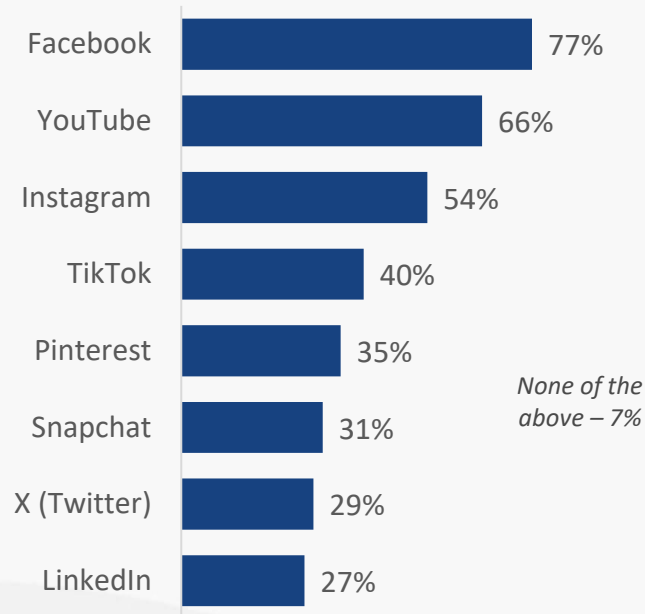
Internet searches, social media, television advertisements and websites were also influential.



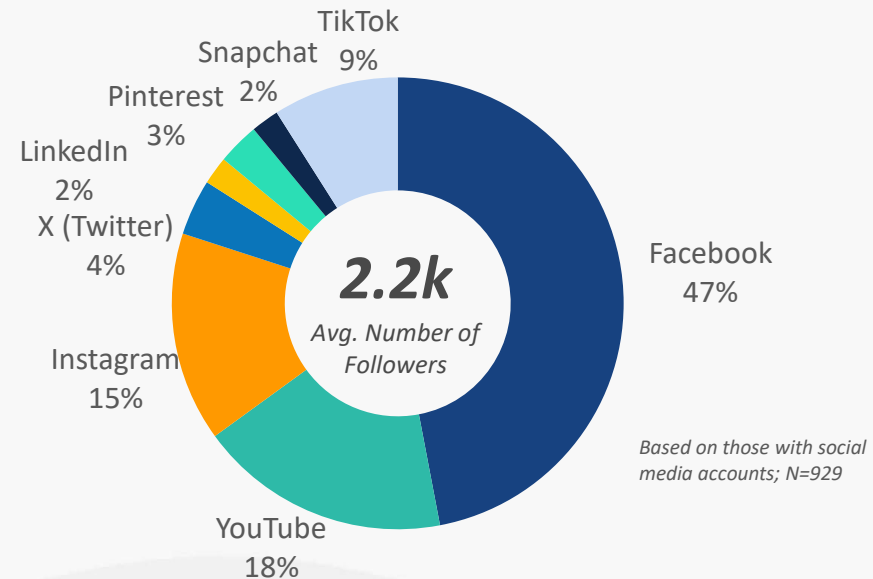
Which of the following types of marketing communications (if any) do you recall seeing, hearing or reading about that have inspired you or contributed to your decision to visit a travel destination or attraction in the past 12 months? Please select all that apply.

More than nine in ten regional travelers have a social media account, with Facebook being utilized most often by nearly half of social media users. YouTube and Instagram are also popular platforms.

Social Media Platforms Ownership



Platforms Used Most Often

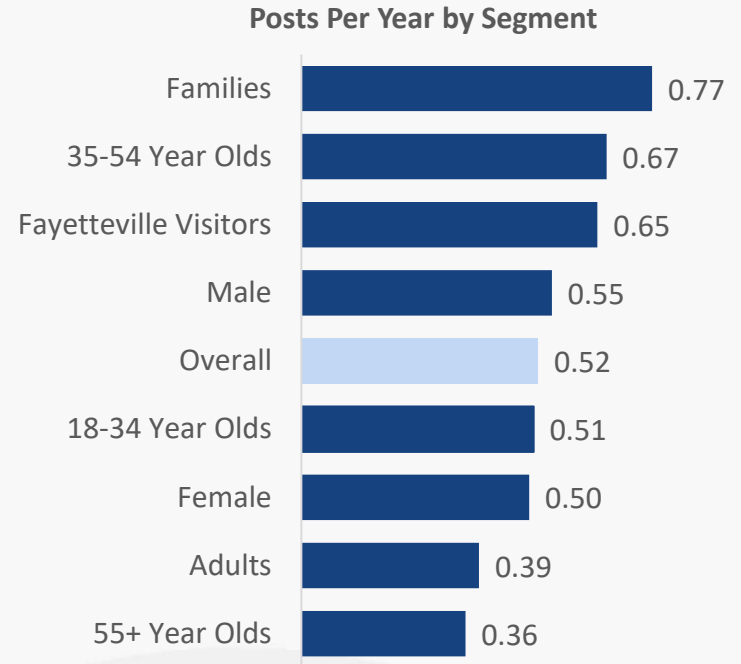
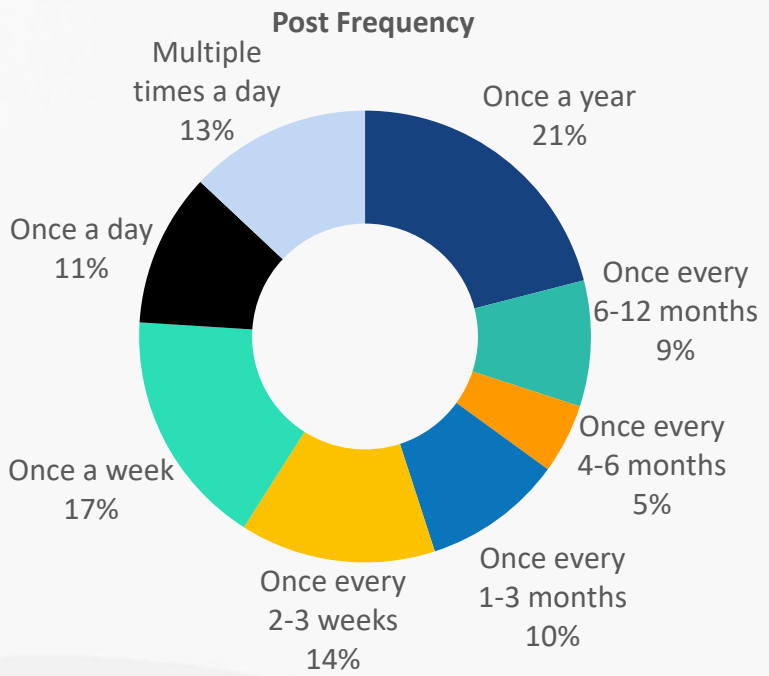


Which of the following social media platforms, if any, do you have an account with? Please select all that apply.

Which of these social media platforms do you use most often?

Approximately how many followers, if any, do you have [on account used most often]?

One in five social media users post only one time per year. However, Fayetteville visitors post more frequently than the average regional traveler, as do families and 35–54-year-olds.



On average, how many times do you post or report articles [on account used most often]?

Based on those with social media accounts; N=929



01. Regional Traveler Mindset

02. Market Landscape

N=1,000

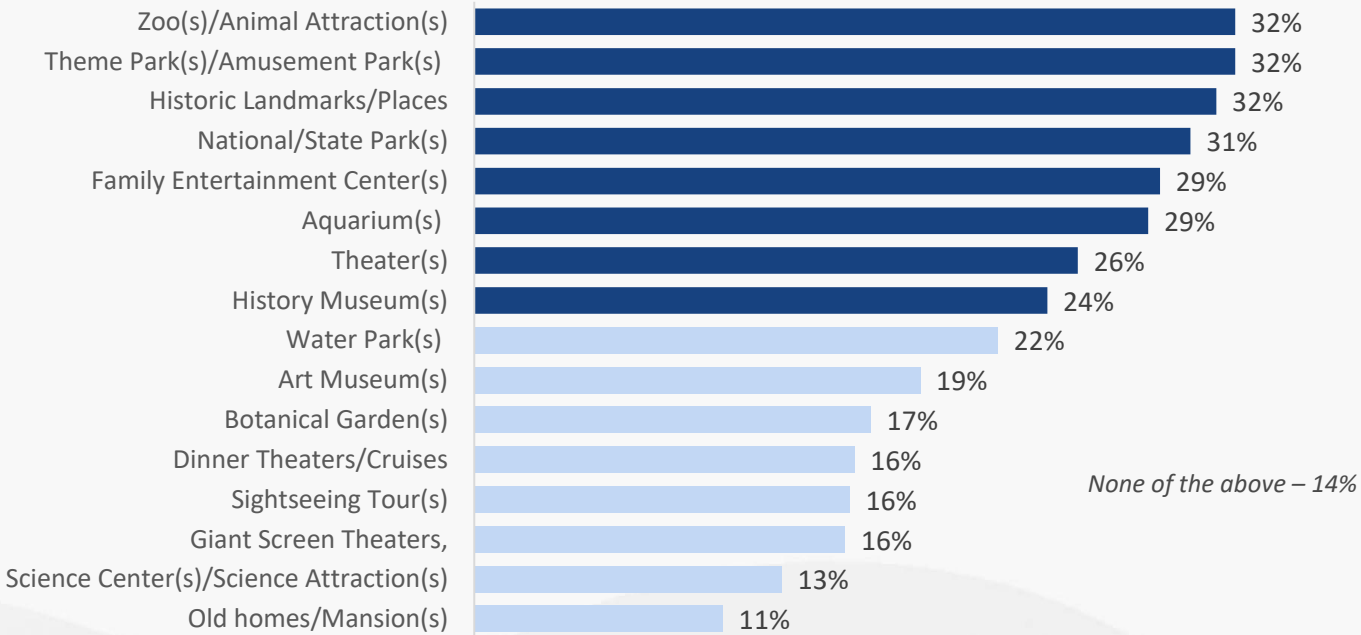
03. Behavioral & Demographic Insights

04. Other Key Findings

Most regional travelers have visited at least one attraction in the past 12 months. One in three indicated that they've visited a zoo, theme park, historic landmark and/or a national or state park.

Attraction Sectors Visited in Past 12 Months

Select All That Apply

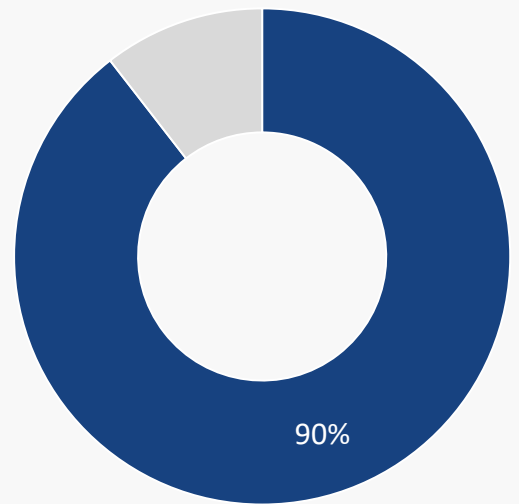


Which of the following types of attractions, if any, have you visited in the past 12 months? Please select all that apply.

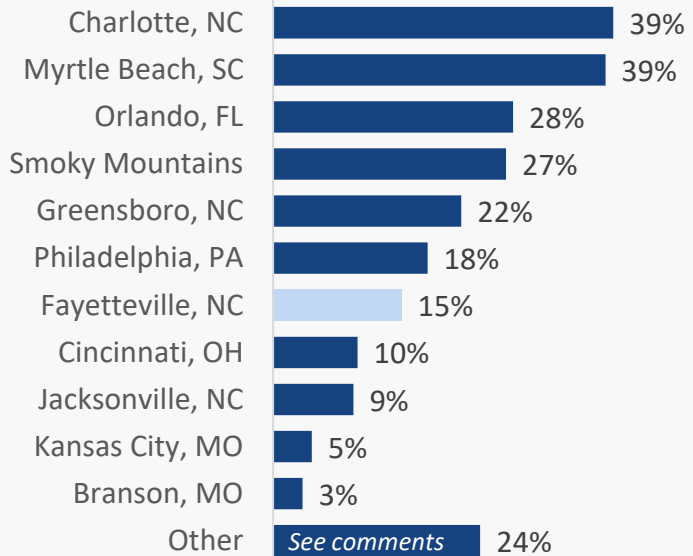


Nine in ten travelers say they travel for leisure on a regular basis. Of the destinations tracked in this study, Fayetteville ranks 7th with a market capture of 15%.

Annually Travel For Leisure



Destinations Visited in Past 3 Years

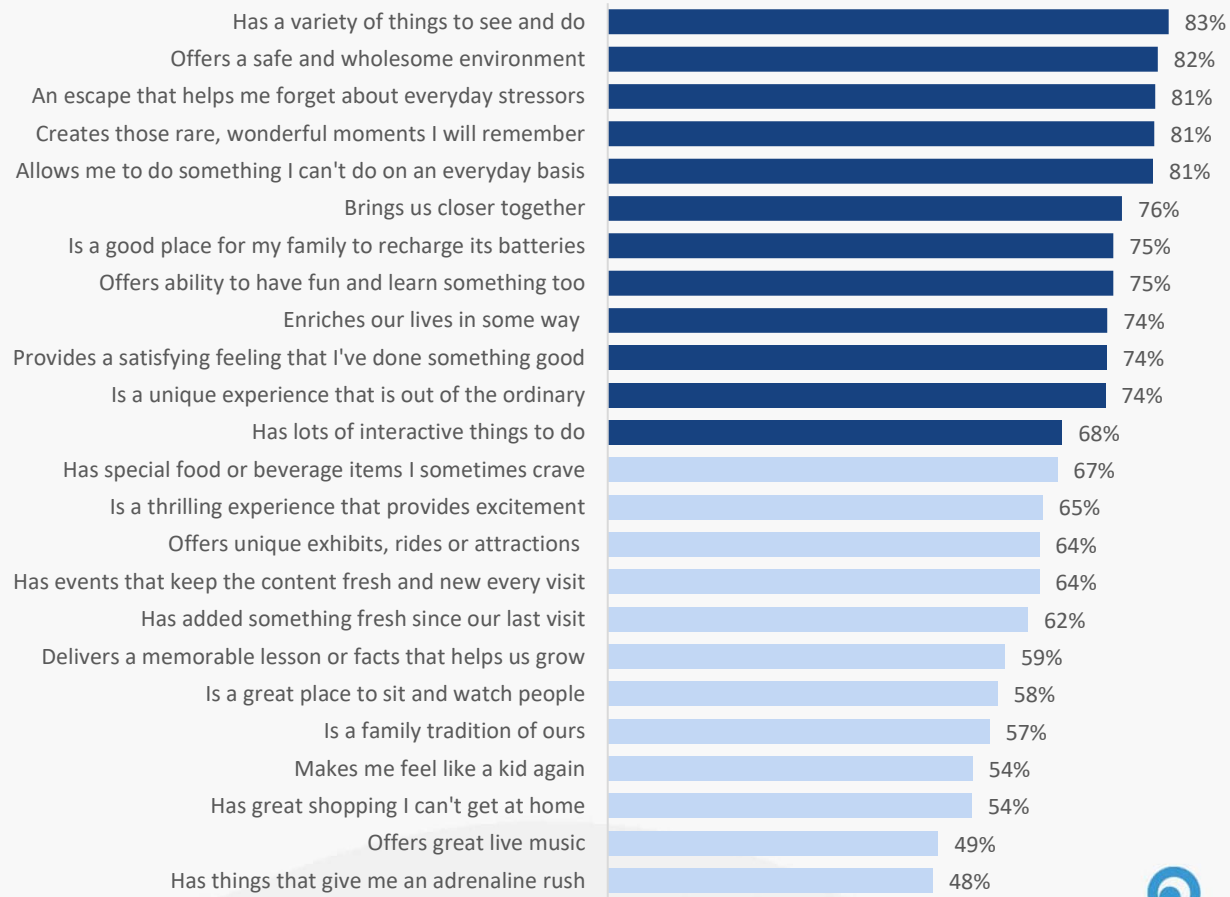


Do you normally take at least one vacation or leisure trip per year which involves an overnight stay, or is at least 50 miles from your home?
Which of the following destinations have you visited in the past 3 years? Please select all that apply.

Destination Attribute Desirability

Regional travelers primarily want to have a variety of things to see and a safe and wholesome environment.

However, it is also important that a travel destination offers an escape from everyday stressors and creates rare, wonderful moments that will be remembered, as well as allows them to do something they can't do everyday.

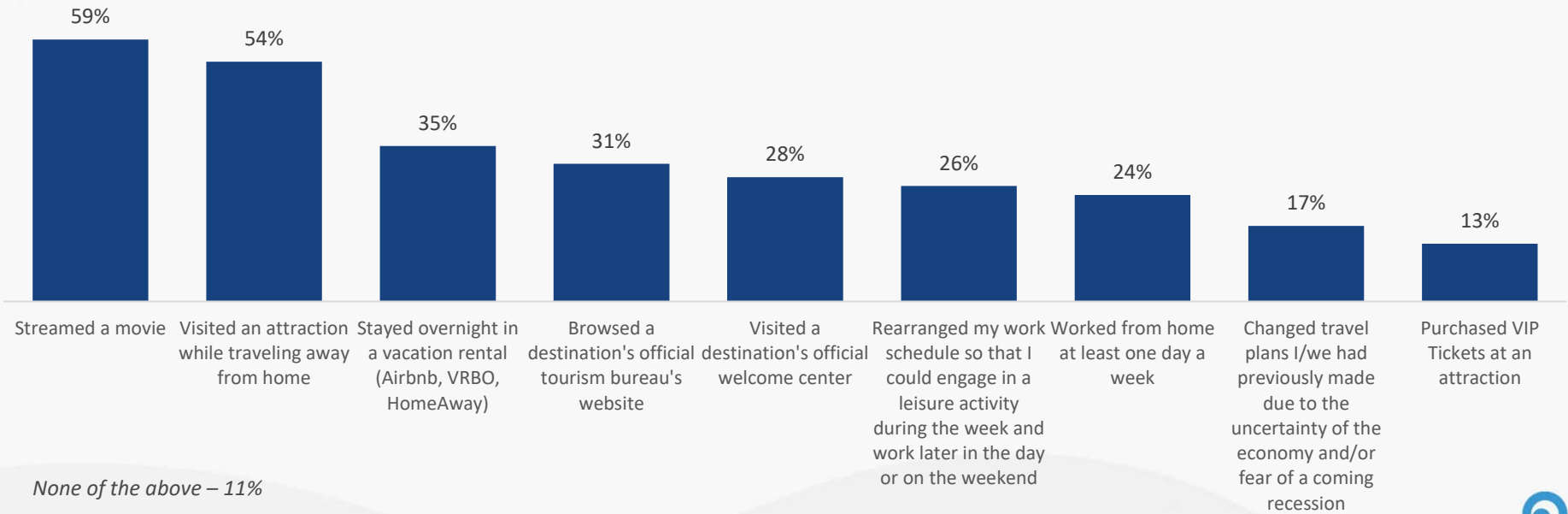


Using the scale provided, please rate how important each of the following issues, attributes or circumstances are to your desire to visit attractions in the destination you visit. 5-pt. scale



More than half of regional travelers indicated that they visited an attraction while traveling away from home within the past 12 months. However, these travelers were not likely to purchase VIP tickets to an attraction.

Activity Engagement Over Past 12 Months
Select All That Apply

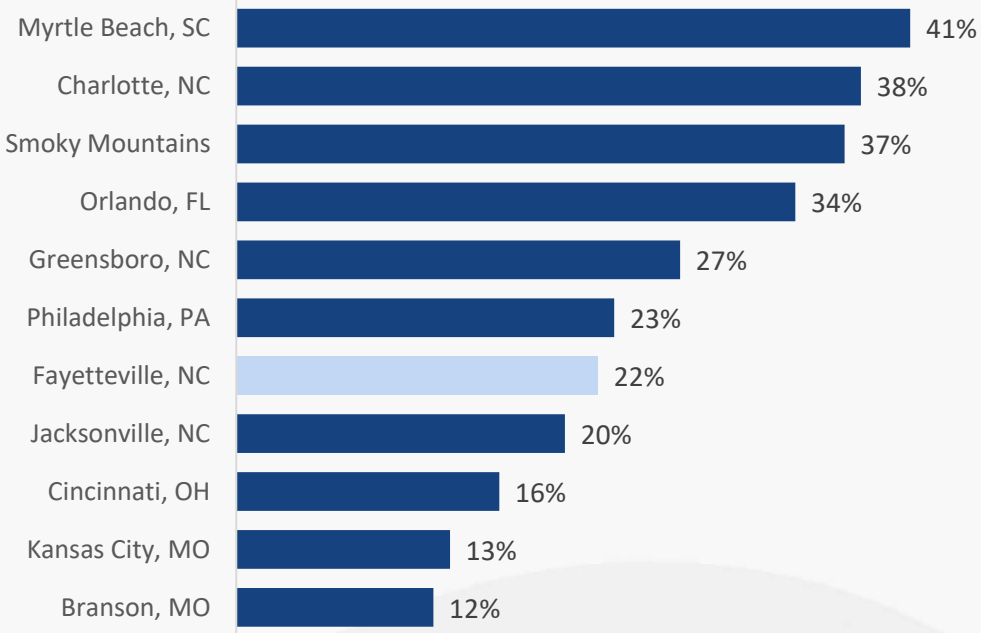


Which of the follow activities, if any, have you engaged in while traveling over the past 12 months?
Please select all that apply.



Regional travelers are most likely to visit Myrtle Beach, Charlotte and the Smoky Mountains in the next year. Fayetteville scored a higher intent than Midwest destinations and fellow North Carolina destination Jacksonville.

Intent to Visit Destinations In Next 12 Months
% Probably/Definitely Will



Using the scale provided, please indicate your intent to visit each of the following destinations in the next 12 months. 5-pt. scale



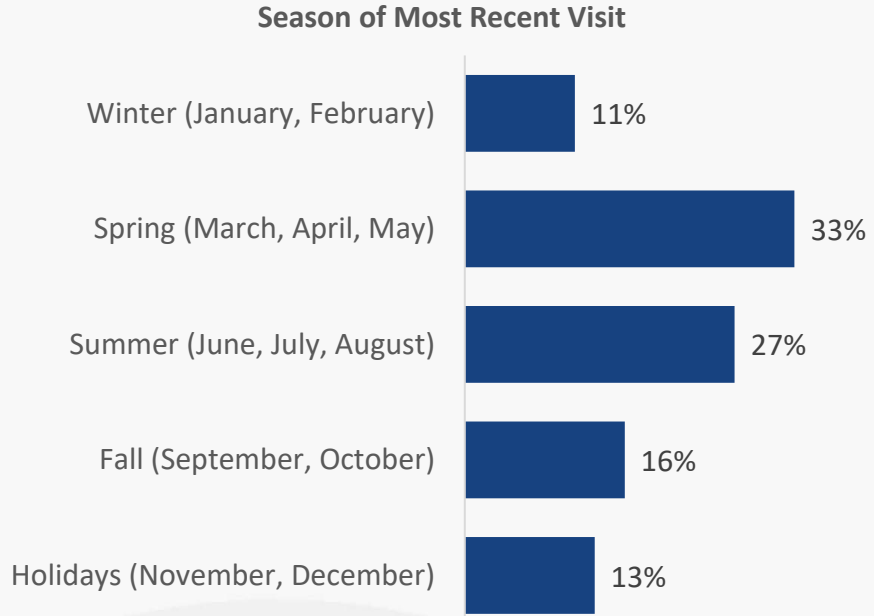
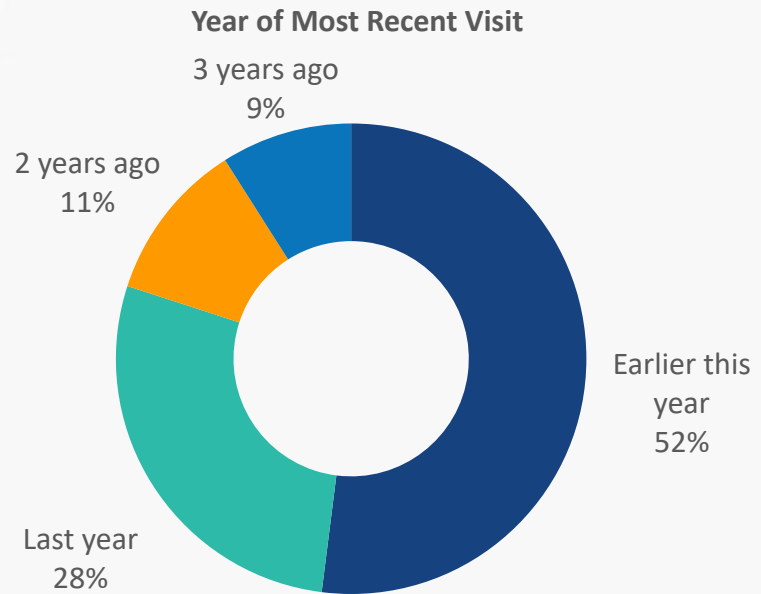
01. Regional Traveler Mindset

02. Market Landscape

03. Behavioral & Demographic Insights N=149

04. Other Key Findings

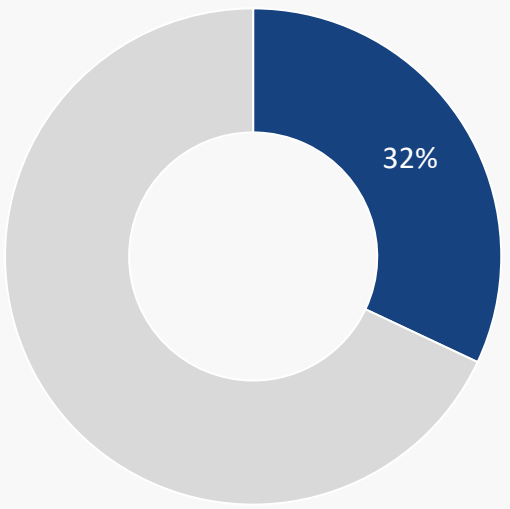
More than half of recent Fayetteville travelers indicated that they visited within the past year. Spring and summer were the most popular times of year to visit.



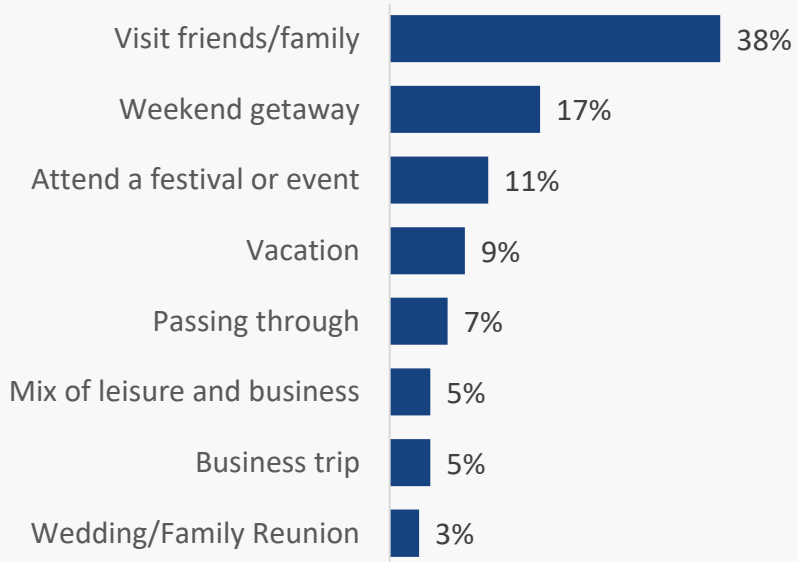
When was your most recent visit to Fayetteville, NC/Cumberland County?
In which month was your most recent visit to Fayetteville, NC/Cumberland County?

Almost one-third of travelers were visiting Fayetteville/Cumberland County for the first time. Whether a return visit or initial visit, most were visiting friends & family or enjoying a weekend getaway.

First Time Visitation



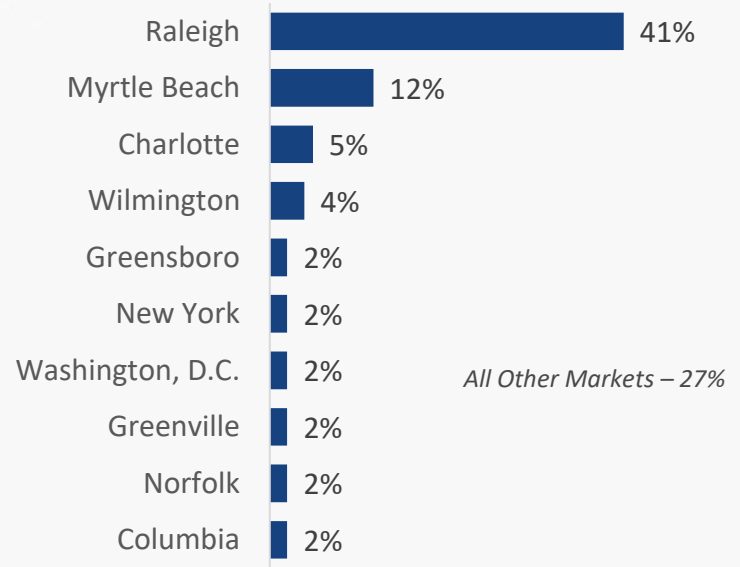
Purpose of Visit



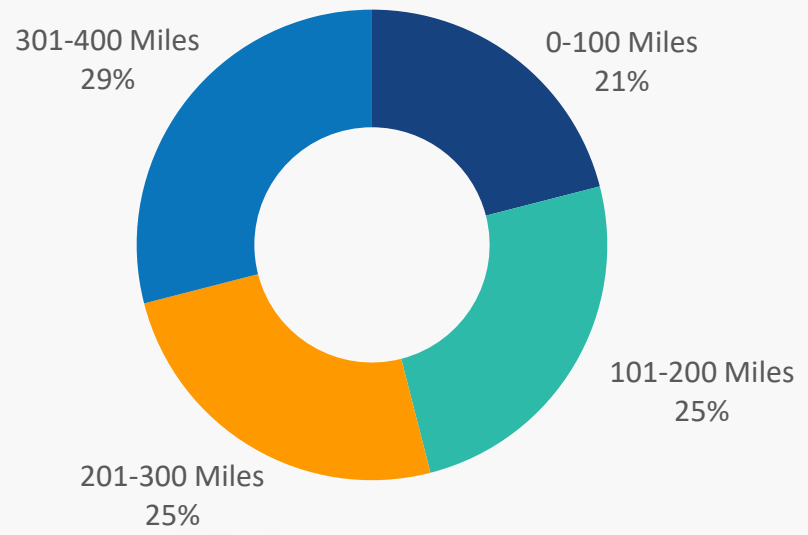
Was this the first time you had visited this destination, or had you been here before?
What was the primary purpose of your most recent visit to this destination?

While distance distribution was relatively even for the purposes of this study, the current FACVB Scout Report shows that over the past 3 years, most visitors are originating from the Raleigh or Myrtle Beach areas.

Top Ten Visitor Markets*



Fayetteville – Distance From Home



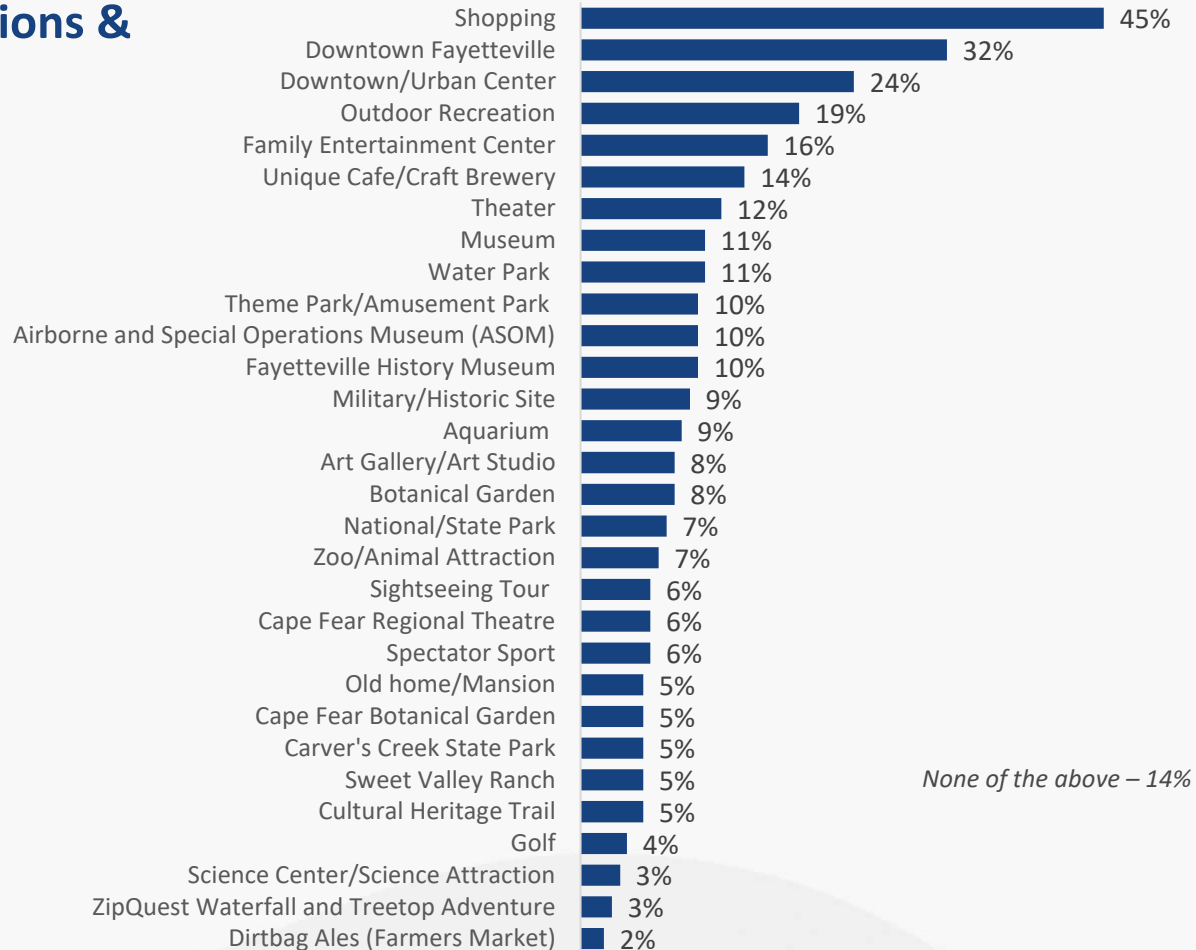
What is your 5-digit home zip code?
*based on FACVB Scout Report



Fayetteville Area Attractions & Activities

Recent Fayetteville visitors participated in local shopping, visited Downtown Fayetteville or the Urban Center.

Outdoor recreation, family entertainment centers and unique café or brewery offerings were also popular activities.



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

The top activities that visitors participated in also played an influential role in their decisions to visit Fayetteville.

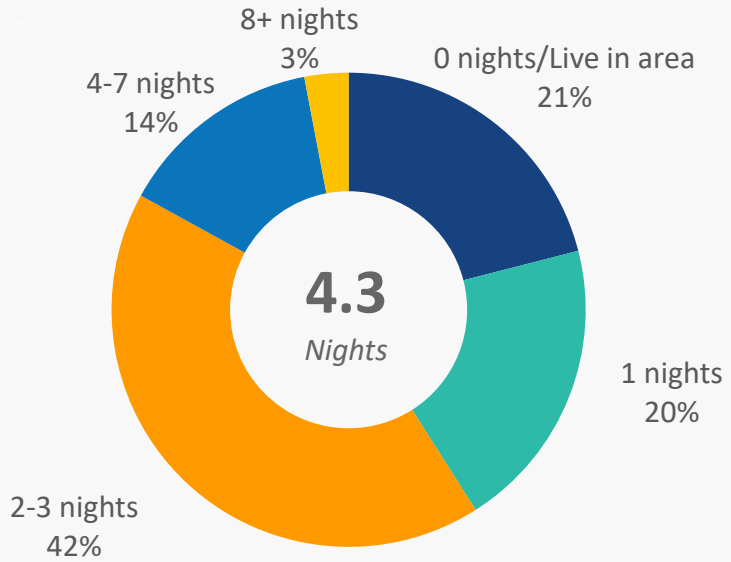
Top 5 Activities with Greatest Influence on Decision to Visit



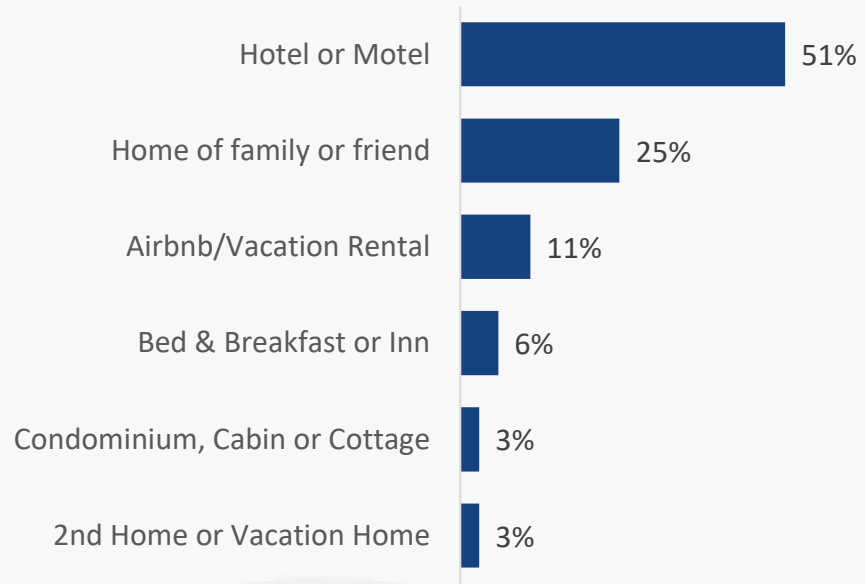
Which of the following, if any, were a major influence in your decision to visit this destination?
You may choose up to 3.

Most Fayetteville visitors spent the night on their most recent trip to the area, staying just over four nights. The majority stayed in hotels or motels, but the homes of family or friends was also a popular option.

Length of Stay



Accommodations



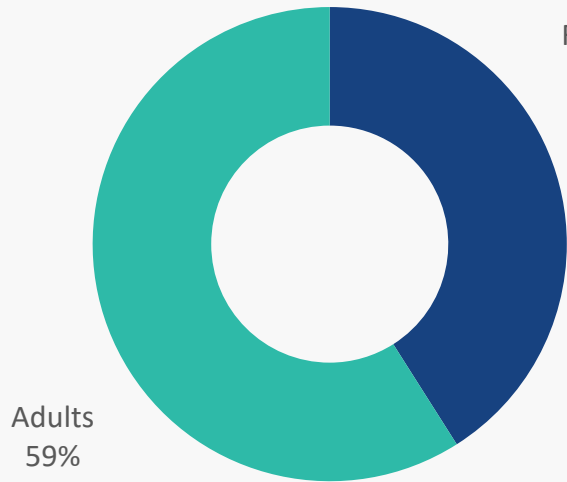
Based on overnight visitors; N=118

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

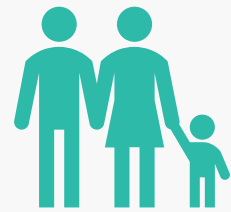


Nearly three in five Fayetteville visitors were adult-only parties. Almost half of visitors would describe their party as kid free—either a single adult or with other adult couples and friends.

Party Composition

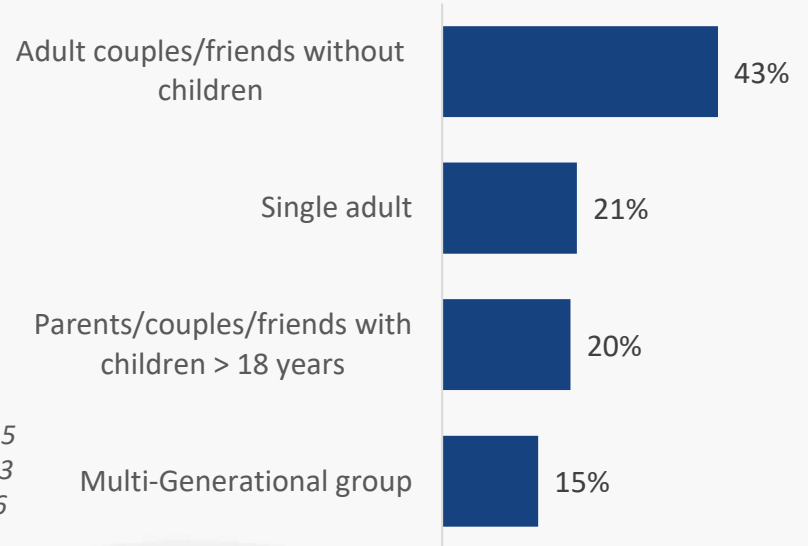


Families
41%



Average Adult Age: 43.5
Average Child Age: 10.3
Average party size: 2.6

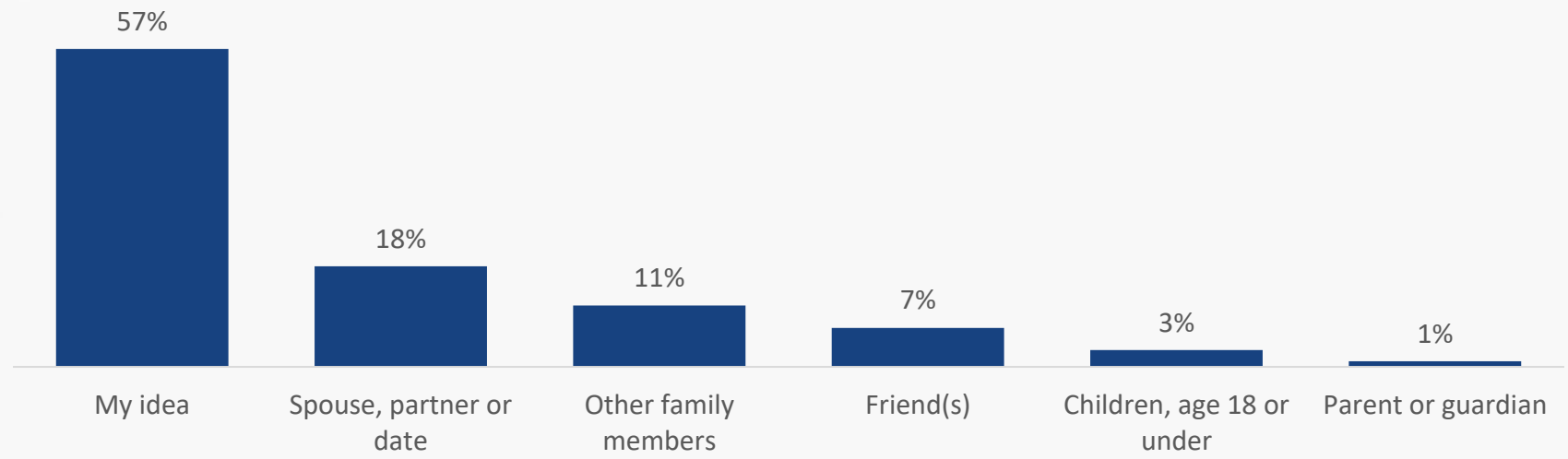
Party Description



Including yourself, how many people in your travel party fell into the following age categories?
Which of the following best describes the composition of your immediate party on this trip?

Likewise, children were not likely to be the driving force behind visits to the area. Nearly three in five visitors indicated that the idea was theirs, followed distantly by spouses or other family members.

Person Responsible For Visit to Fayetteville

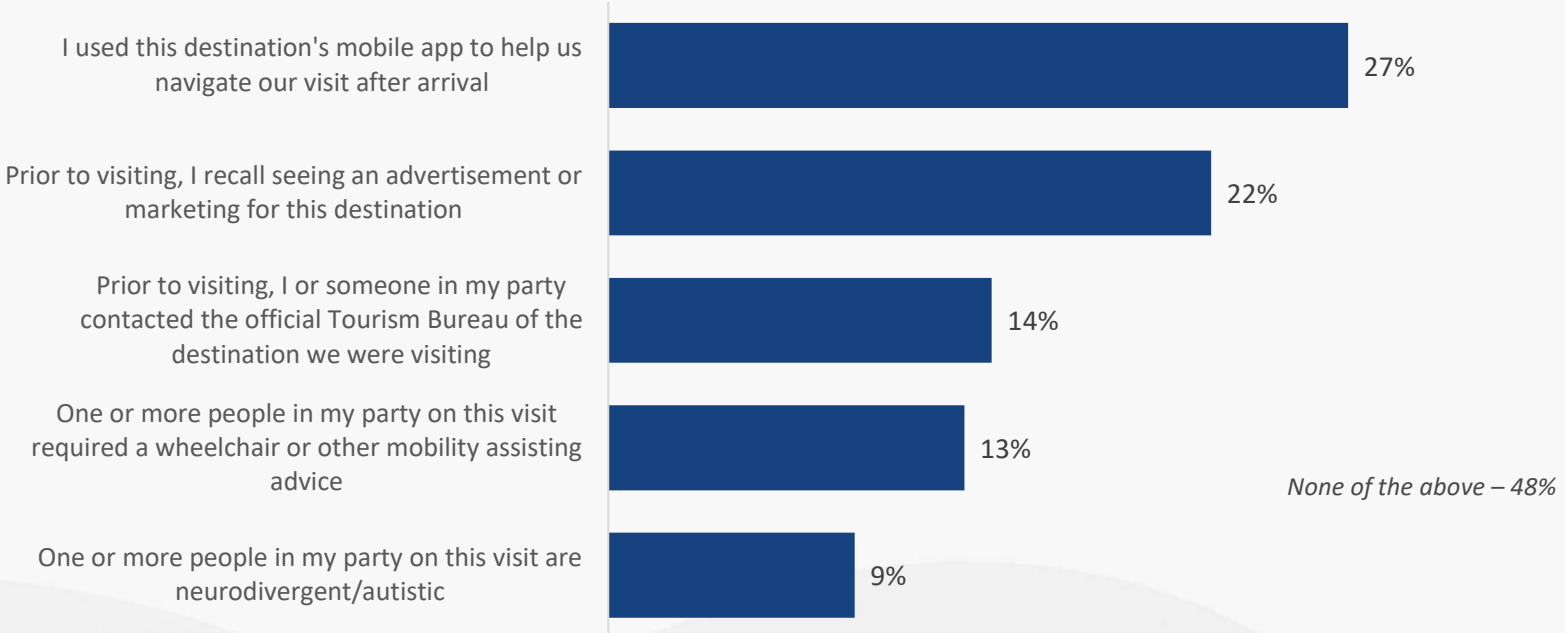


Who in your party first suggested the idea of visiting this particular destination?



Many Fayetteville/Cumberland County visitors either say they used the destination's mobile app (27%) during their visit, recalled seeing an ad prior to visiting (22%) or that a member of their party contacted the CVB (14%).

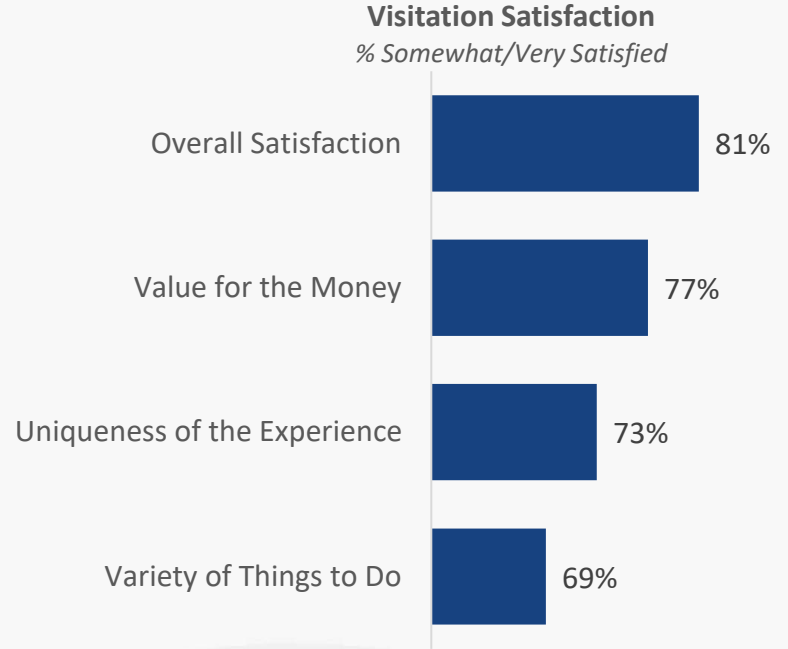
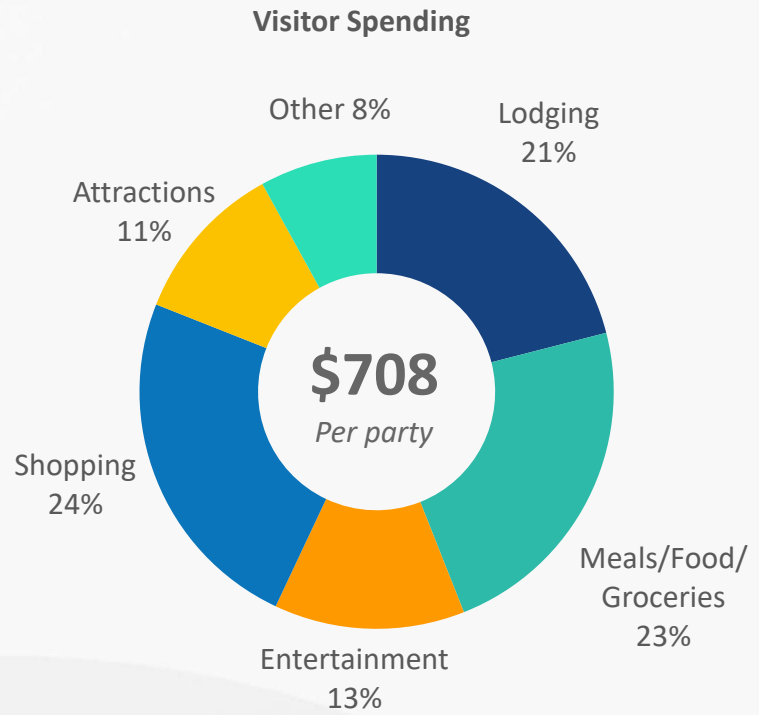
Statements Describing Travel Party
Select All That Apply



Which of the following, if any, did you do, use or describes your party on this particular leisure trip?
Please select all that apply to this same visit.



Fayetteville visitor spending was evenly split between lodging, food, and shopping, with overall spending averaging just over \$700 per party. Likewise, guests were very satisfied with the perceived value for the money.



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.

Please rate your level of satisfaction with your experience on this occasion across each of the following categories. 5-pt. scale

01. Regional Traveler Mindset

02. Market Landscape

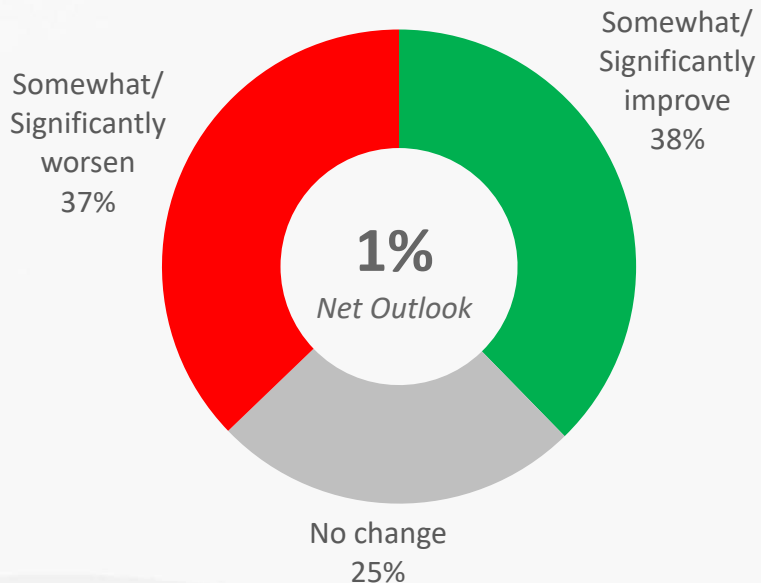
03. Behavioral & Demographic Insights

04. Other Key Findings

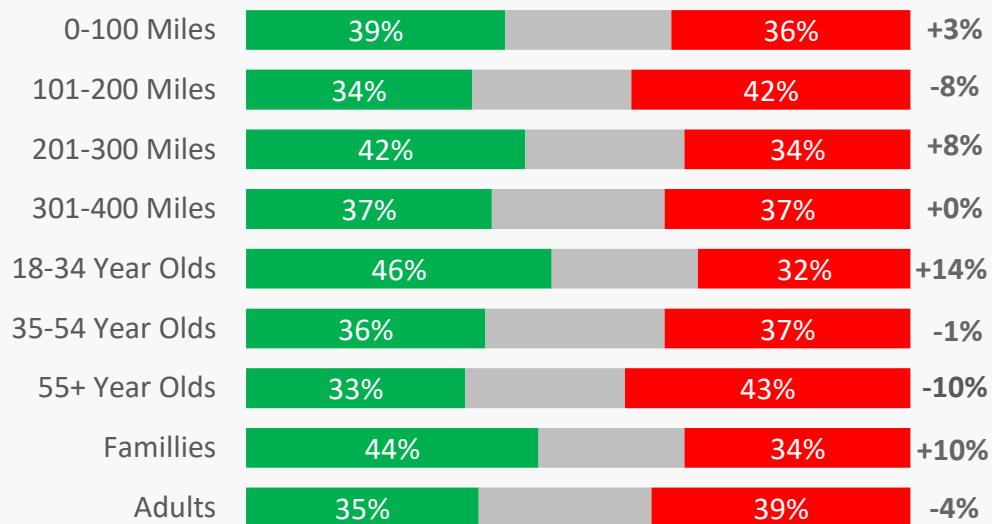
N=1,000

Regional travelers continue to be relatively split on their outlook of the economy over the next six months. However, the outlook is more positive among families than adults and younger travelers than older.

Economic Outlook – Next 6 Months



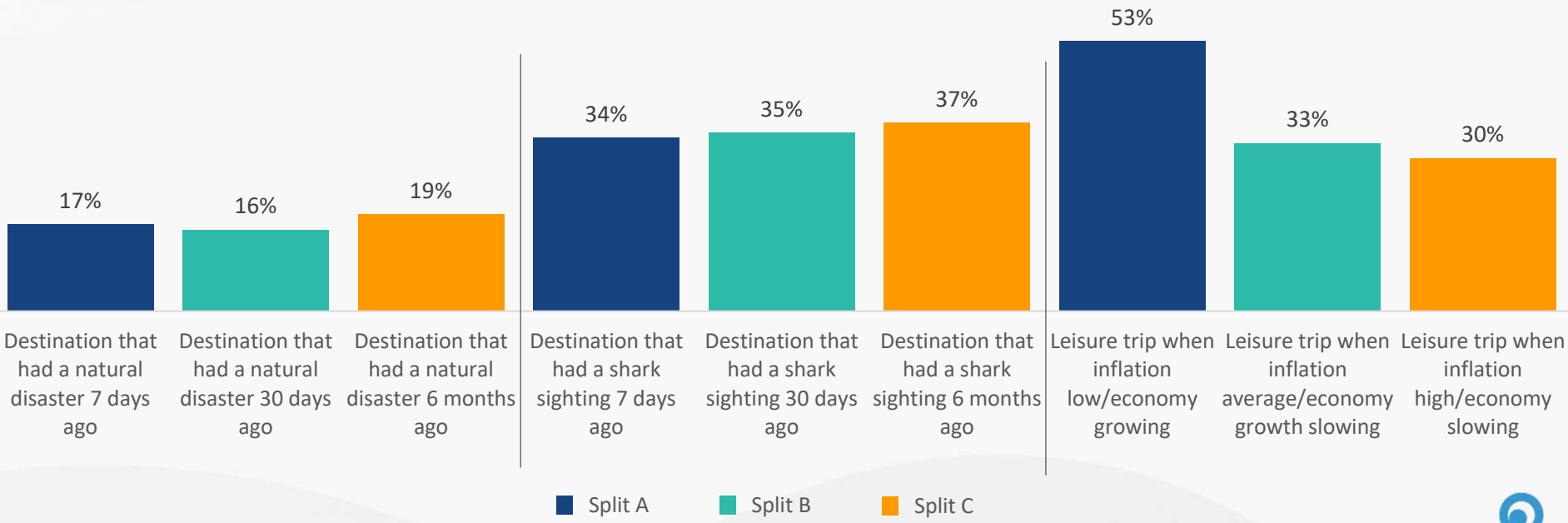
Outlook by Segment



Which of the following best describes how you believe the U.S. economy will perform over the next 6 months? 5-pt. scale

Regional travelers are less influenced by natural disasters and shark sightings than they are of inflation and the state of the economy.

Intent to Visit in Next 12 Months Given These Scenarios...
% Probably/Definitely Will

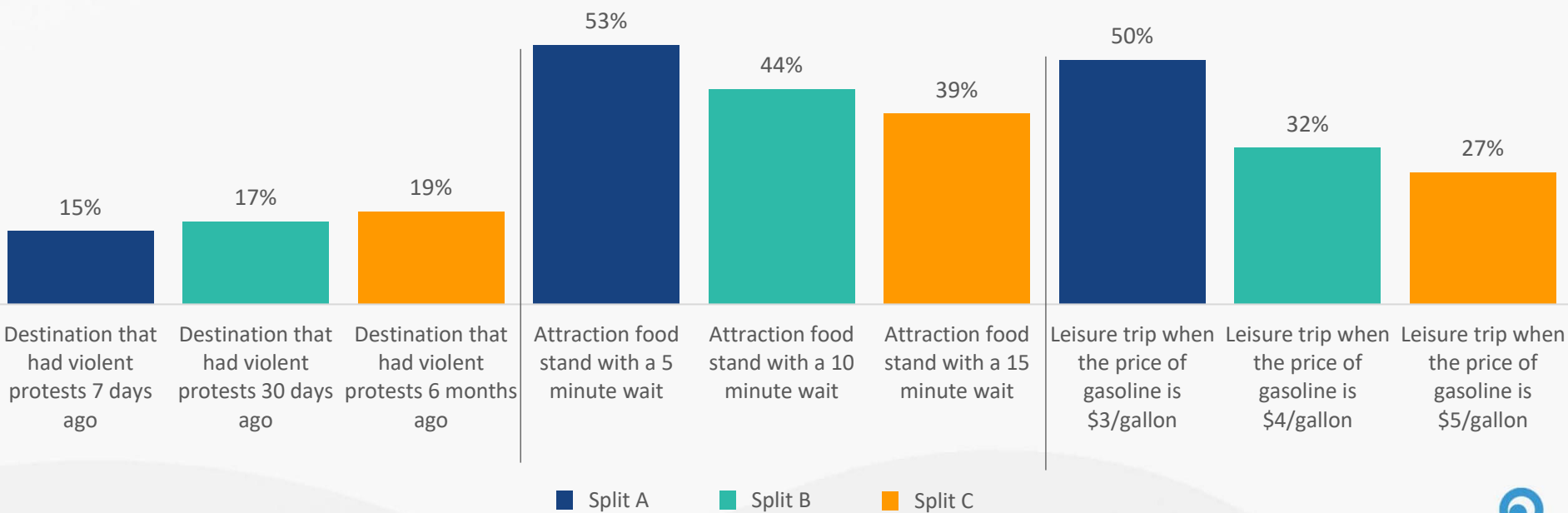


Next, please consider each of the following situations and indicate how likely you could be to do each one in the next 12 months given each of these scenarios. 5-pt. scale



And while violent protests have little impact on travel decisions, attraction food wait times and the price of gasoline matters greatly.

Intent to Visit in Next 12 Months Given These Scenarios...
% Probably/Definitely Will



Next, please consider each of the following situations and indicate how likely you could be to do each one in the next 12 months given each of these scenarios. 5-pt. scale



Demographics

		Overall	Fayetteville Travelers	Fayetteville Non-Travelers	0-100 Miles	101-200 Miles	201-300 Miles	301-400 Miles
Gender	Male	40%	51%	38%	40%	39%	42%	37%
	Female	60%	49%	62%	60%	60%	57%	63%
Respondent Age	Avg. Age	47.3	41.6	48.3	46.7	48.5	46.8	47.1
	18-34 Years	32%	44%	30%	34%	30%	32%	32%
	35-54 Years	32%	33%	32%	31%	32%	34%	33%
	55+ Years	36%	23%	38%	35%	38%	34%	35%
Household Ages	Under 12 Years	14%	11%	15%	15%	15%	13%	14%
	12-17 Years	8%	12%	7%	4%	7%	11%	7%
	18-34 Years	25%	30%	24%	27%	25%	24%	26%
	35-54 Years	25%	25%	25%	25%	24%	26%	26%
	55+ Years	28%	22%	29%	29%	29%	26%	27%
Household Size	2.5	2.4	2.5	2.4	2.5	2.5	2.5	2.6
Household Composition	Adults	51%	49%	52%	55%	52%	48%	51%
	Families	49%	51%	48%	45%	48%	52%	49%
Ethnicity	Non-Hispanic White	72%	57%	74%	66%	77%	73%	71%
	People of Color	28%	43%	26%	34%	23%	27%	29%

Research developed for FACVB.

Our team loves the magic of data and research. We work until the voice of your customer is clear and you have the answers you need. If you have questions about this report, please let us know:

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