

TravelTrakAmerica – Fayetteville NC Profiles

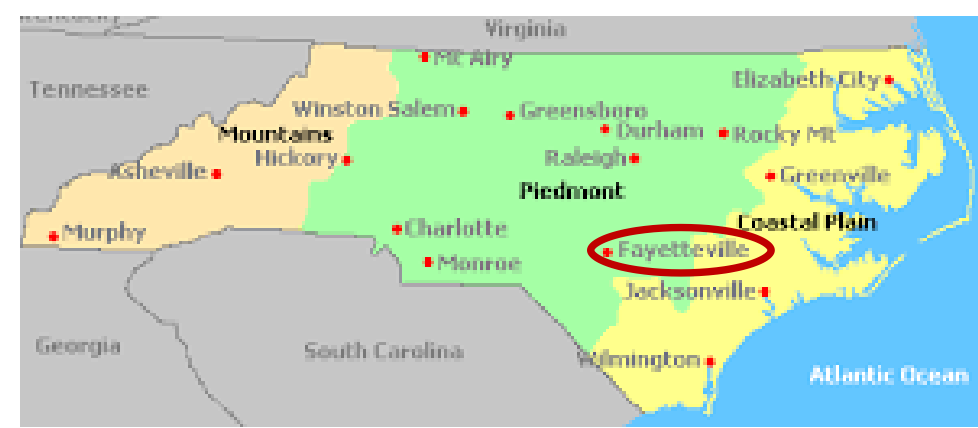


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How to Read Profiles

Definition of Travel in TravelTrakAmerica: Travel = trips of at least 50 miles from home (one-way) OR spend 1+ nights

Profile Topics:

- Market Relevance: The proportion of total US and North Carolina travelers who visited this region; person-trips includes all members of the travel party (for example, if your travel party included you, your spouse, and 2 children, the person-trips would be four)
- Markets: Total US and Total North Carolina visitors are shown for comparisons. Data include comparisons of the top 2 state markets (Virginia and North Carolina) and top 4 DMA markets (Washington DC, Greensboro/High Point/Winston-Salem, Greenville/New Bern/Washington, and Raleigh/Durham/Fayetteville) where visitors reside.
- Demographics: Proportions and/or averages for key demographics
- Choices/Behaviors – Key Attributes:
 - Travel Party – Total includes travelers in the group that do not live in the same household. “Any <18” are the proportion of all travel groups with children IN the same household
 - Length of Stay by Lodging – The average number of nights in each type of accommodation
 - Spontaneity – How long was the trip considered (planned) before it occurred
 - Primary 1-2 Activities on Trip – The top 2 activities selected and grouped (netted by type) into categories. The lower chart shows specific activities (whether listed as a primary or secondary activity or not) selected by at least 5% of visitors
 - Satisfaction – Those rating their trips as a “5” (extremely) or a “4” (very) on a 5-point scale
- Fayetteville usually highlighted with a red box or with a red fill
- Data collected from TravelTrakAmerica Calendar Year 2015 – 2017 (3-year average)

Summary

Fayetteville Visitors

Demographics – Compared to the US and to North Carolina

- Roughly 1 in 25 (4%) of North Carolina visitors come to Fayetteville
- Visitors tend to be younger than travelers elsewhere and more likely live in households with children under 18
- Fayetteville visitors earn less (and report less formal education) and are less likely to be married
- More are likely to be of African-American heritage

Trip behaviors / choices

- More likely to come to Fayetteville to visit friends and/or relatives
- Travel party size similar to other destinations, although less likely to travel in pairs and slightly more likely to travel with children
- + • Because many live nearby, the planning horizon is relatively short (about 40% plan the trip within 2 weeks of departure), so quick Fayetteville promotions could work
- Most spend the night, although usually in a private home rather than paid accommodations
- Their focus on family/friends as the purpose of the trip make them less lucrative tourists (they spend less than average), but suggests that promoting activities for the whole family could benefit Fayetteville
- + • Enticing those from Virginia and the Washington DC area would be lucrative – they spend more, are less focused on VFR, and they often spend the night and choose paid accommodations
- Although overall Fayetteville visitors stay a bit longer than average, those from the key (nearby) markets take shorter trips
- They return home happy, but their enthusiasm lags other destinations' visitors (who are less focused on friends/family)

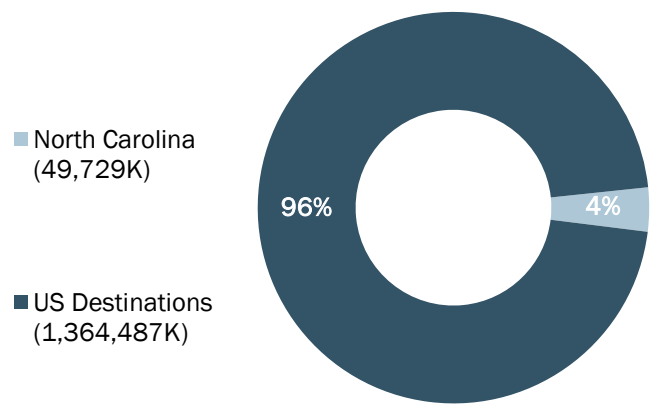
Fayetteville Highlights - Demographics



Market Relevance and Source Markets

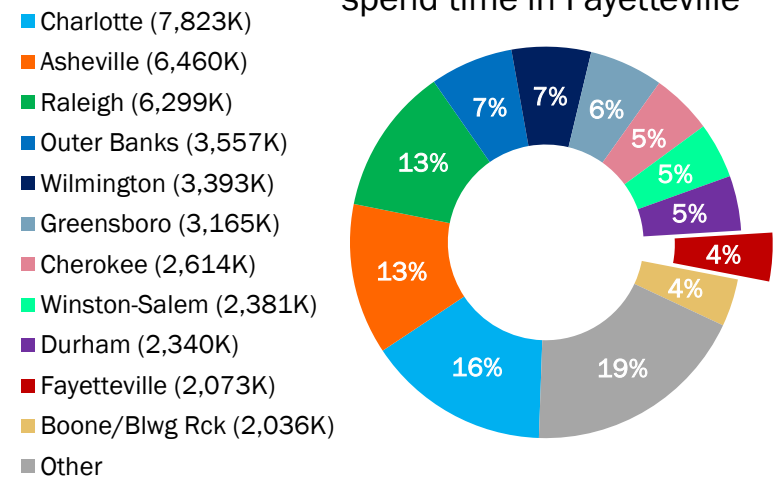
Where Travelers Go

Four percent of Total US Visitors spend time in North Carolina



North Carolina % of Total US Travelers (person-trips)

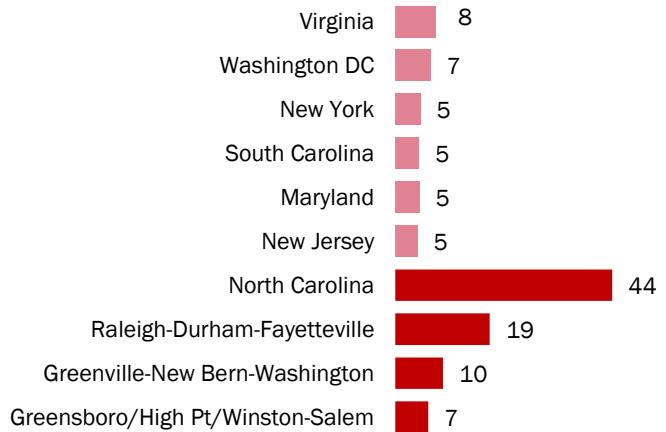
Four percent of NC visitors spend time in Fayetteville



Fayetteville % of Total NC Travelers (person-trips)

From Where (Top Fayetteville Source Markets)

Most Fayetteville visitors live in-state or nearby areas



Where Fayetteville Visitors Live

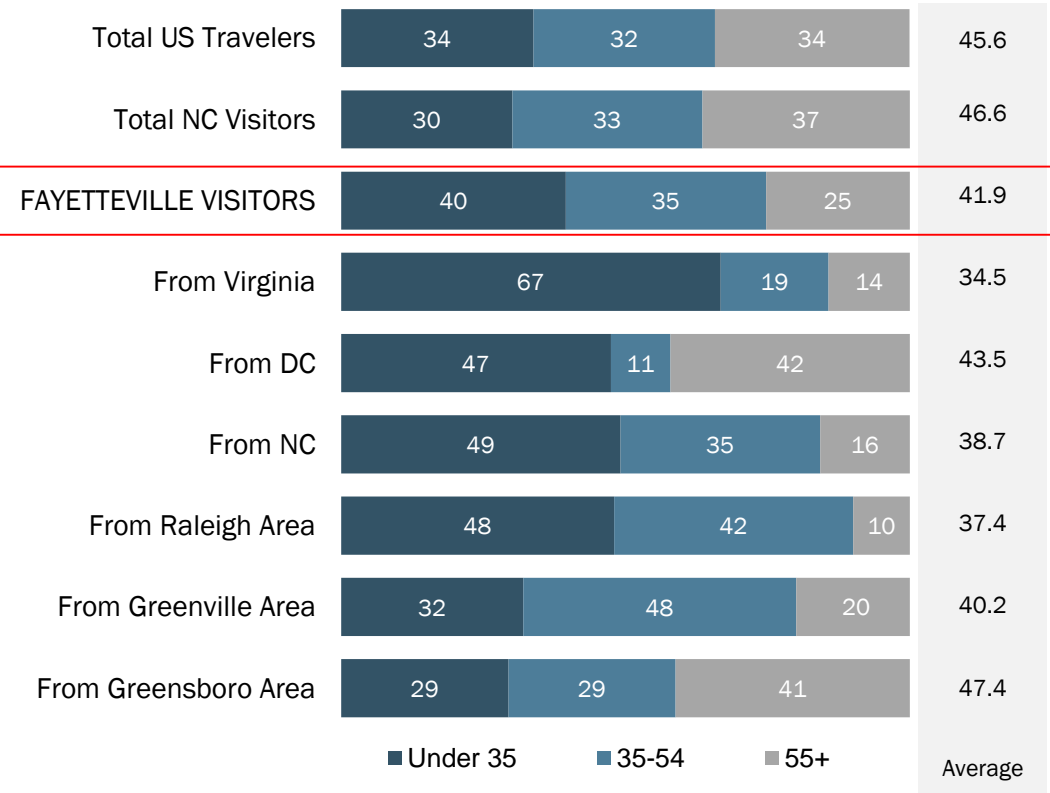


TTA data at state level, demo weighted except Market Relevance = projected weight Q4a/d, trip level, 3-year rolling average

Demographics

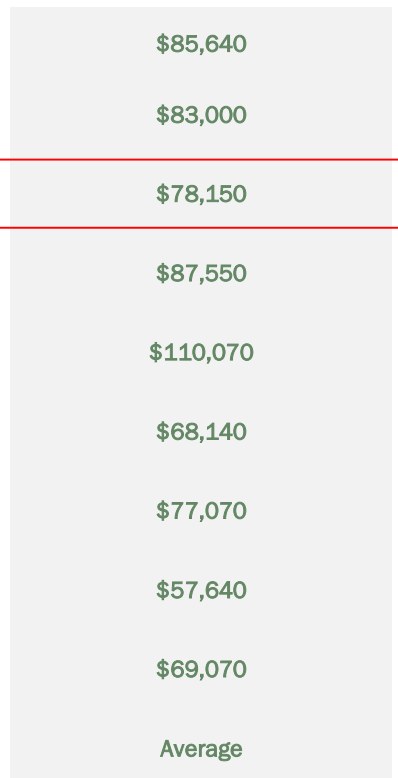
AGE

Fayetteville’s visitors skew younger than travelers elsewhere – especially those from Virginia and Raleigh.



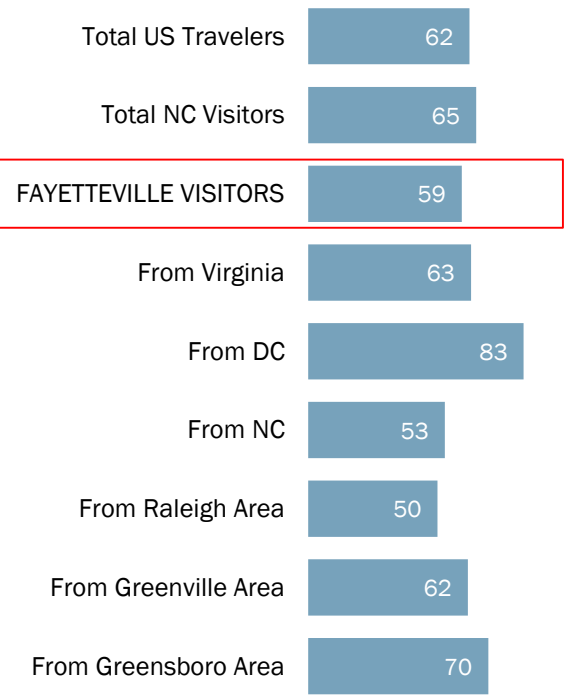
AVG HOUSEHOLD INCOME

Fayetteville visitors earn less than other US and NC travelers, reflecting lower incomes of visitors from the Greenville area, but is mitigated by high incomes of DC visitors.



% MARRIED

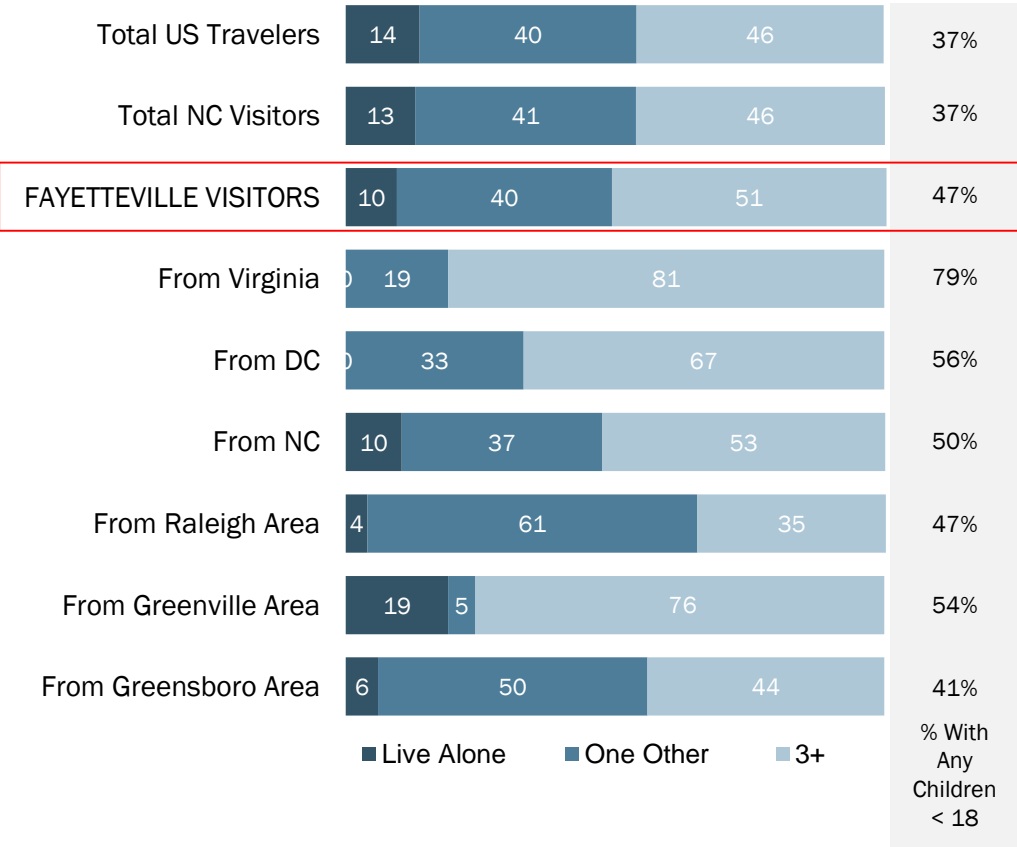
Fayetteville visitors are slightly less likely to be married than other travelers. Notably, visitors from DC are most likely married, contributing to their higher (dual) incomes.



Demographics *continued*

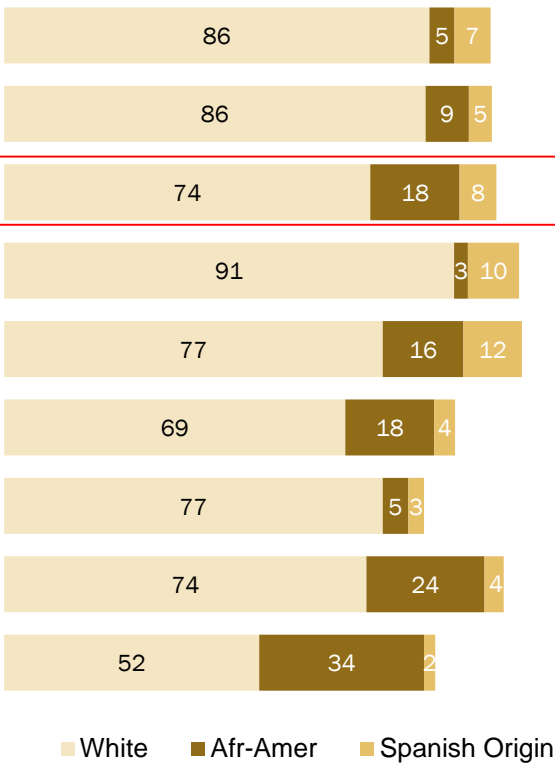
HOUSEHOLD COUNT

Consistent with their younger ages, Fayetteville visitors more likely live with children < 18 than other travelers – especially visitors from Virginia.



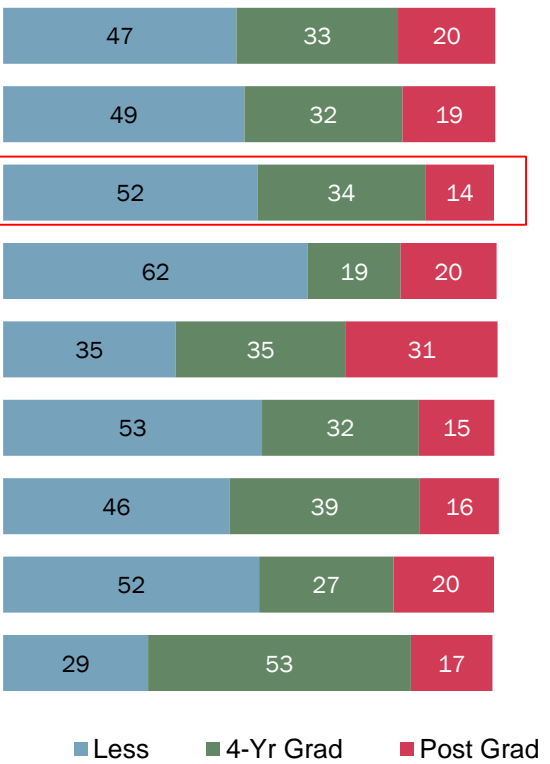
ETHNICITY

As elsewhere, most Fayetteville note Caucasian ethnicity, but a larger share note African-American heritage than the overall US or total North Carolina.



EDUCATION

Fayetteville visitors have slightly less formal education than average travelers. Visitors from DC report the highest attainment, consistent with their higher incomes.



Note: Not all ethnicities shown and some may overlap, so totals won't sum to 100%



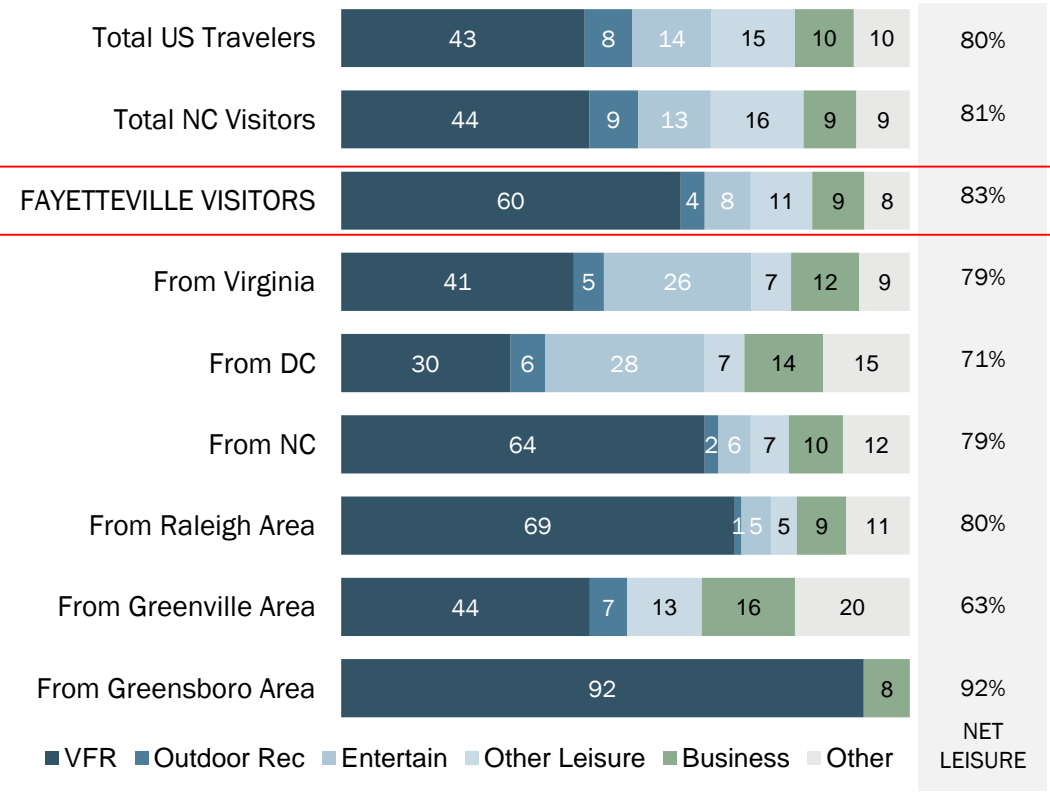
Fayetteville Highlights–Trip Characteristics



Trip Characteristics

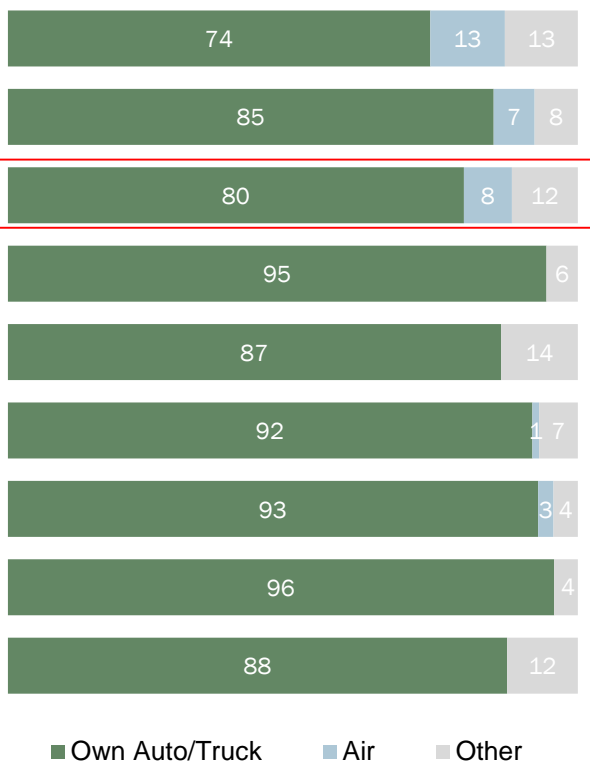
PRIMARY PURPOSE

Fayetteville visitors, like competitors, usually visit for leisure, but a much greater share come to visit friends and relatives (VFR). Roughly one in 10 comes for business.



PRIMARY MODE

Most Fayetteville visitors drive – much like travelers throughout the US. As expected, those from nearby markets usually drive.



Note: Other includes rental cars, motorcycles, campers/RVs, as well as trains and buses.

TRAVEL PARTY SIZE

Fayetteville visitors are a bit more likely to have children with them on a trip – especially those from Greensboro. However, the household travel party size hovers near 2 for all groups.

TOTAL	In Hshd	% Pairs	% w/kids
2.65	2.1	40%	26%
2.6	2.1	41%	24%
2.6	2.1	39%	28%
2.6	2.2	55%	27%
2.4	2.0	56%	13%
2.2	2.0	35%	27%
2.1	1.9	46%	21%
2.4	2.3	17%	26%
2.1	1.9	42%	31%

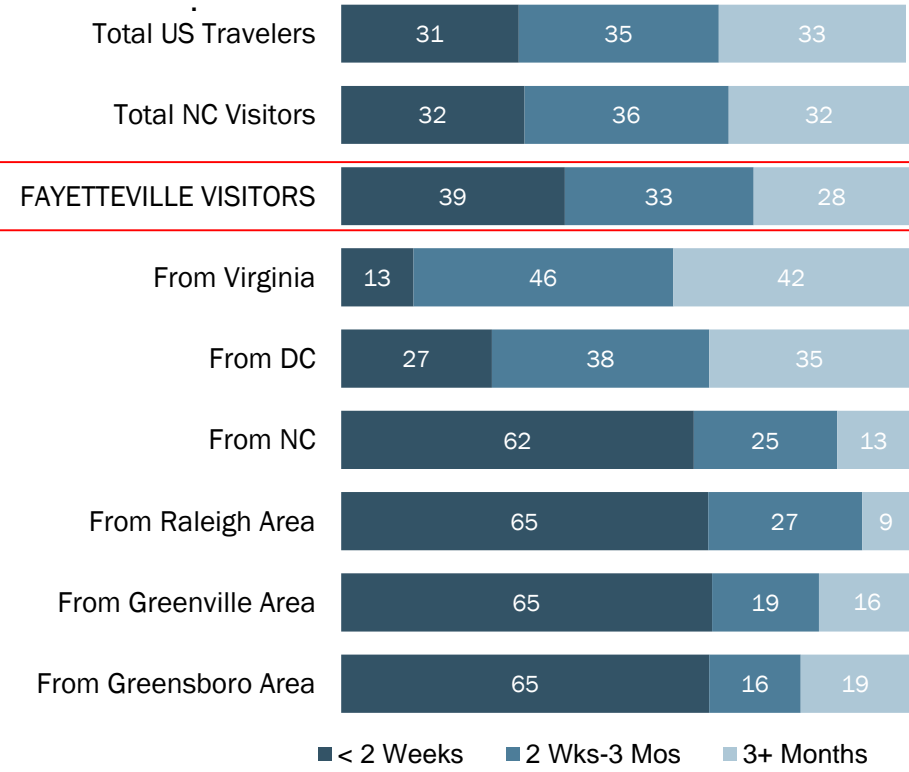
Including Travelers Not in Household All Travelers Live in Household 2 Travelers % of Travel Parties Include Children <18



Trip Characteristics *continued*

SPONTANEITY*

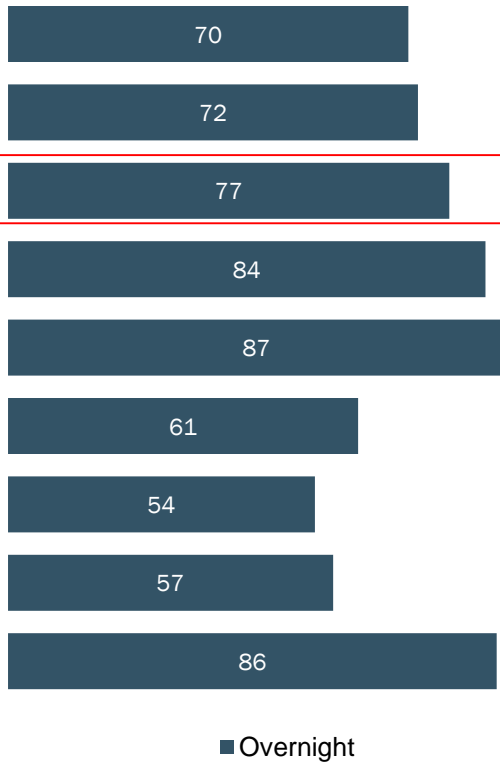
With tourism concentrated from nearby areas, Fayetteville visitors spend less time planning their trip (most commonly within 2 weeks) than those going to other destinations – particularly home state visitors (62%).



*How long considered trip before taking it

% STAY OVERNIGHT

Fayetteville visitors tend to spend the night – although fewer of them when they come from Raleigh or Greenville.



LENGTH OF STAY BY LODGING

Since many Fayetteville visitors come to visit friends/relatives, a large share of them spend their overnights in private homes. **Green signifies at least half of total.**

PAID*	Private Home	Shared Economy	Other (Tent, etc.)	TOTAL NIGHTS
1.0	0.9	0.1	0.5	2.5
0.8	1.0	0.1	0.6	2.5
1.1	1.5	0.02	0.4	3.0
1.0	0.8	0	0.1	1.8
1.3	0.5	0	0	1.7
0.4	0.9	0.04	0.3	1.7
0.3	0.8	0	0.1	1.1
0.7	1.5	0	0.1	2.3
0.4	0.7	0	0.8	1.8

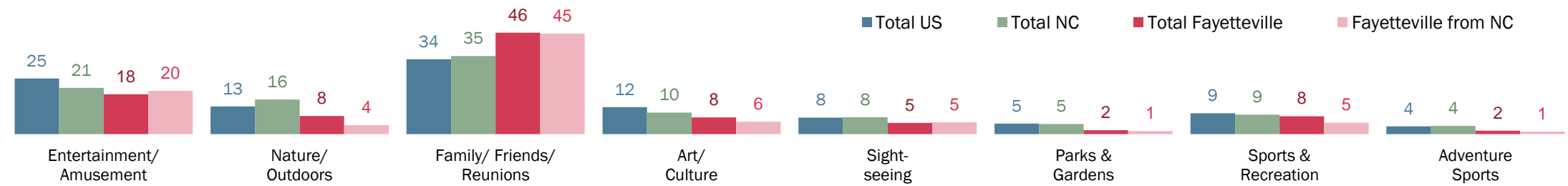
*Hotel/Motel/B&B)



Trip Characteristics *continued*

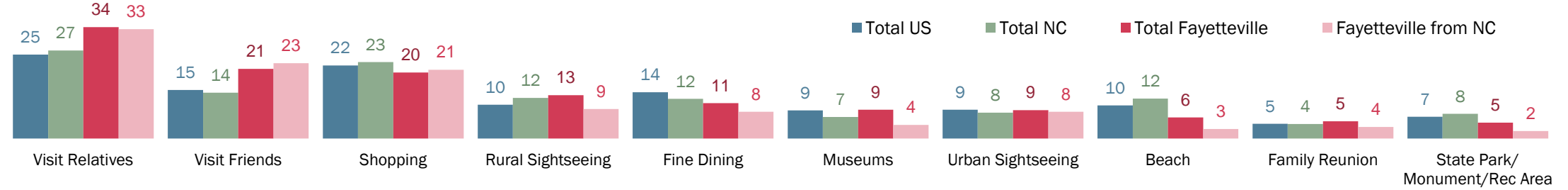
PRIMARY 1-2 ACTIVITIES (NET BY TYPE) ON TRIP (Can Select Multiple Activities)

Fayetteville visitors select Family/Friend/Reunions much more often than other travelers as one of their primary trip activities – meshing with their trip purpose noted earlier. Although they lag on all other kinds of activities, many also engage in Entertainment/Amusements.



TOP (5%+) ACTIVITIES: Every Activity (Not Just Primary and Not Netted)

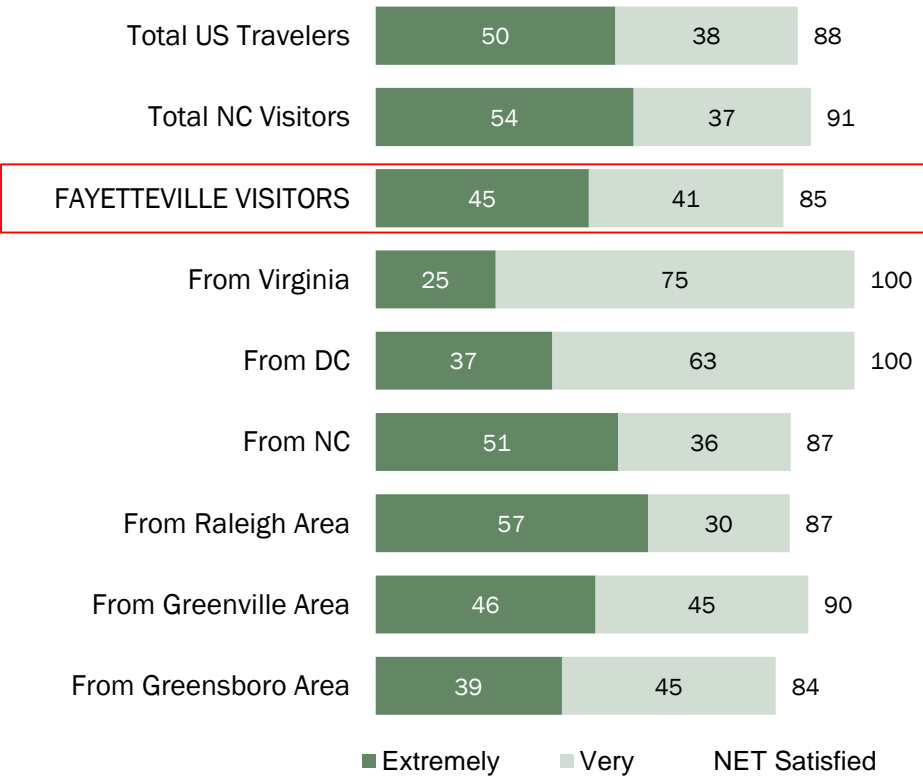
As noted above, Fayetteville visitors focus on friends and, especially, relatives. Sightseeing ranks above average as well; other activities lag that of other travelers.



Trip Characteristics *continued*

SATISFACTION WITH TRIP

Most visitors praise their visit to Fayetteville, but they tend to be less passionate (selecting “very” rather than “extremely” satisfied) than visitors to other places. Those from Raleigh (including locals) have the greatest enthusiasm, suggesting greater familiarity with what they deem as Fayetteville’s strongest features.



AVERAGE TRIP SPEND

Fayetteville visitors spend less than other travelers – especially Raleigh visitors who are least likely to spend the night.

TOTAL TRIP SPENDING	Excluding “Transportation to”
\$691	\$547
\$523	\$438
\$407	\$318
\$306	\$245
\$294	\$245
\$185	\$169
\$143	\$130
\$194	\$186
\$188	\$166

What Does It All Mean and Further DMA Analyses?

- Though Visiting Friends and/or Relatives (VFR) is the primary purpose of 60% of visitors to Fayetteville, visitors are still satisfied with their visit, and are staying in paid accommodations at a higher rate than a typical NC visitor. As such, a new or revised VFR campaign should benefit the area. The typical national VFR traveler tends to rate a destination lower on satisfaction, and on average they only participate in one activity during their stay. If the Bureau is able to increase VFR activity participation by just one activity it should increase satisfaction levels as well as increase spending levels.
- With the planning horizon being relatively short (about 40% plan the trip within 2 weeks of departure), the Bureau can leverage geo digital targeting to move visitors quickly.
- Virginia and the Northern Virginia/Maryland/Washington DC area visitors appear to be good targets as they rate Fayetteville very high on satisfaction levels and are staying overnight. However, the spending levels are low compared to their household incomes. Targeted and on message digital efforts should impact visitation and spending from these areas.
- Lastly, further analyses into Fayetteville's origin markets uncovered that approximately 20% of Fayetteville visitors originated from VA, MD, and Washington DC. As such, your marketing efforts may be well spent in the Northern Virginia, Maryland, and Washington DC corridor. The DMA of Norfolk/Portsmouth/Newport News may also be a fruitful area based on military population compositions.

Research Methods & Activity Summary



Research Methods

TARGET AUDIENCE

- US Households:
 - Weighted demographically (region, age, income, household size, marital status) to reflect the characteristics of US households
 - Trip information is collected for up to three trips in the past month and projected to the number of households in the total US; detailed information is collected by state for up to 3 states per trip
- Some data represent person-trips – these take into account the immediate travel party size for each household as well

METHODOLOGY/TIMEFRAME

- TravelTrakAmerica is a web-based study with monthly e-mail invitations sent to representative households from the LSR panel and its partners
- Data collection focuses on travel taken during the past month
- The field period runs for two weeks, usually starting in the middle of the first week

Activity Nets

ART AND CULTURE	<ul style="list-style-type: none"> ■ Art galleries, Historic sites/churches, Museums, Musical theatre, Native American ruins/rock art, Local/folk arts/crafts, Old homes/mansions, Theatre/drama, Symphony/opera/concert, Musical performance/show
ADVENTURE SPORTS	<ul style="list-style-type: none"> ■ Hang glide/skydive/base jump, Hike/backpack/Canyoneer, Mountain bike, Rock/mountain climb, Scuba dive/snorkel, Ski/snowboard, Water ski, Whitewater raft/kayak/canoe/paddleboard
SPORTS AND RECREATION	<ul style="list-style-type: none"> ■ ATV/four-wheel, Bike/road bike/cycle, Fish, Golf, Horserace, Horseback ride, Hunt, Motor sports-NASCAR/Indy, Motor boat/jet ski, Sail, Snowmobile, Snow sports other than ski/snowmobile, Sports events (major/pro, youth/amateur/collegiate/other – spectator or participant)
NATURE/OUTDOOR ACTIVITIES	<ul style="list-style-type: none"> ■ Beach, Bird watch, Camp, Caverns, Nature travel/eco-touring, Wildlife view, Zoos/aquariums/aviaries, Farms/ranches/agri-tours, Other nature (photography, rockhound, etc.)
ENTERTAINMENT/AMUSEMENT	<ul style="list-style-type: none"> ■ Casino/gaming, Fine dining, Nightclubs/dancing, Rodeo/state fair, Shop, Spa/health club, Special events/Festival (e.g., Mardi Gras, hot air balloon races), Theme/amusement/water park, Wine taste/winery tour, Craft breweries, Distilleries
FAMILY ACTIVITIES/REUNION	<ul style="list-style-type: none"> ■ Family reunion, High school/college reunion, Visit friends, Visit relatives
SIGHTSEEING	<ul style="list-style-type: none"> ■ Rural sightseeing, Urban sightseeing, Area where a TV or movie was filmed
PARKS AND GARDENS	<ul style="list-style-type: none"> ■ Gardens, State park/monument/recreation area, National park/monument/recreation area



Thank you!

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