



# + Fayetteville & Cumberland County, NC

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Brand Research & Strategy Presentation

September 18, 2019

Research

Strategic DNA

Creativity & Action

# Today's Content

Today's findings and ideas are **the underpinning of the creative brand still to be developed.**

▶ We will discuss **what North Star observed, what locals believe and what outsiders perceive.**

Many themes will sound familiar, but **confirmation is important.**

Then, we will discuss how these findings and insights have led us to a **strategy and brand DNA** recommendation.

# Summary of Key Insights

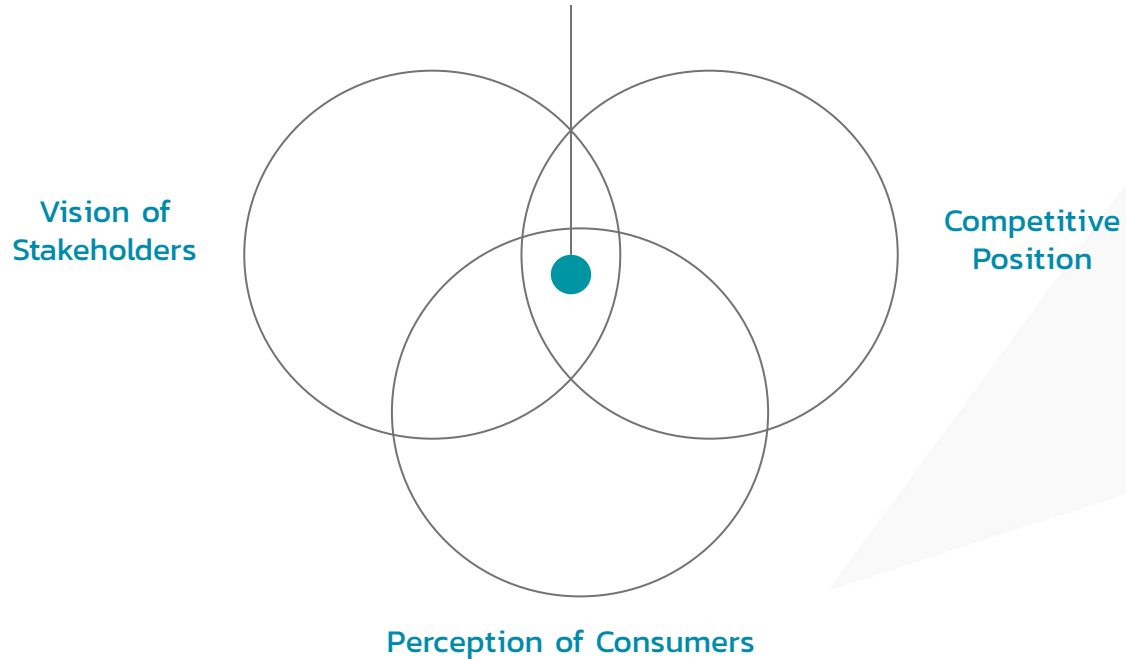
## Key Findings

- Invested & Expectant
- Skewed Self Perception (That Needs Correcting!)
- Lower Relative Familiarity Creates Neutral Outside Understanding (Not As Bad As You Think!)
- Transience & Ethnic Diversity Drive A Welcoming, Accepting Culture
- An Extraordinary Talent Source (and Ethos) Is Here for Employers
- Generosity of Spirit & A Service Mindset
- Greatest Strengths Are Unknown (to Outsiders), The Stage is Set For Surprise
- Area History & Fort Bragg Have Inspired A Community-wide Culture of Readiness & Action



# Research

## Fayetteville and Cumberland County's Strategic Brand Platform (DNA)

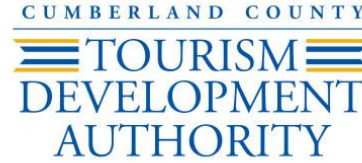


# Research Instruments

- **Situation Analysis**
- **Research and Planning Audit**
- **Communications, Social and Media Audit**
- **Site Visit:**
  - **Familiarization Tour**
  - **Red Carpet Tour**
  - **Stakeholders/Residents Interviews**
  - **Focus Groups**
  - **Undercover Interviews**
- **Stakeholders Vision Survey (Community Leaders)**
- **Community Survey (Citizens)**
- **Brand Barometer (Citizens)**
- **External Influencer Perception Study** (Qualitative) Interviews about Fayetteville / Cumberland County with external influencers
- **External Consumer Awareness & Perception Study** (Quantitative) Visitors & Non-visitors to Fayetteville/Cumberland County from Greater Charlotte, Greater Raleigh, Greensboro and Wilmington
- **Competitive Positioning Review**

# Materials Audit

FAYETTEVILLE/CUMBERLAND COUNTY  
PARTNER VISUALS



# Materials Audit

## MATERIALS

- *Cumberland County Demographic Study (NC's Southeast/ESRI)*
- *Collaborative Marketing Materials and Research Overview*
- *Cumberland County Mission, Vision, Core Values*
- *Fayetteville Communications Department Overview*
- *Cumberland Fort Bragg Communities Town Map*
- *FCEDC Labor Overview 2019*
- *Top Employers for Cumberland County (The Alliance)*
- *Greater Fayetteville Chamber Map and Resource Guide*
- *Discovering America's Hometown, Fayetteville Area Visitor's Guide*
- *Spring Lake Visitor's Guide*
- *Hope Mills Visitor's Guides*
- *Cumberland County Passport (CVB)*
- *Cumberland County Visitors Profile (2/2019)*
- *CV Bureau Business Brief: Results Report (2/2019)*
- *Arts Council of Fayetteville & Cumberland County literature*
- *Fayetteville, NC: A Pictorial History*
- *Celebrate Fayetteville (Chamber Picture Book)*
- *Fayetteville, NC "An All American History"*
- *Fort Bragg Growth and Future Presentation*
- *NC History Project: Fort Bragg*
- *The Paraglide (several editions)*
- *2018 Year in Review, 2019 Year in Preview (Up & Coming Weekly, L. Pyo)*
- *Top Employers for Cumberland County*
- *"FayWHAT? How Multicultural is Fayetteville?" (Fayetteville Observer)*
- *Fayetteville Wants a New Brand (Business NC)*
- *Discover Fayetteville 2018-19*
- *The Original Relocation Guide*
- *Museum of the Cape Fear Historical Complex literature; Cool Springs Downtown literature*
- *Cape Fear Botanical Garden literature*



**5,000+ Voices**

**Uncovering Fayetteville  
& Cumberland County's Unique Story**



# Qualitative & Quantitative Research

# Locally Focused Research

## LOCAL PERCEPTIONS

### Site Visits

Qualitative

165+ conversations

Focus groups  
One-on-one interviews  
Site tours  
Undercover interviews

### Stakeholders

Qualitative

134 respondents

Online survey with  
business and community  
leaders/stakeholders

### Residents

Quantitative

**3,051** respondents

Online and printed survey  
open to all who live and or  
work in Fayetteville &  
Cumberland County

# Community Survey

3,051 local city/county residents surveyed.  
Questions informed by site visit and Stakeholders survey



# Brand Barometer

## Answering The Question:

*“On a scale of 1–10, how likely are you to recommend **living, visiting or doing business in** Fayetteville and Cumberland County to a friend or colleague?”*

14

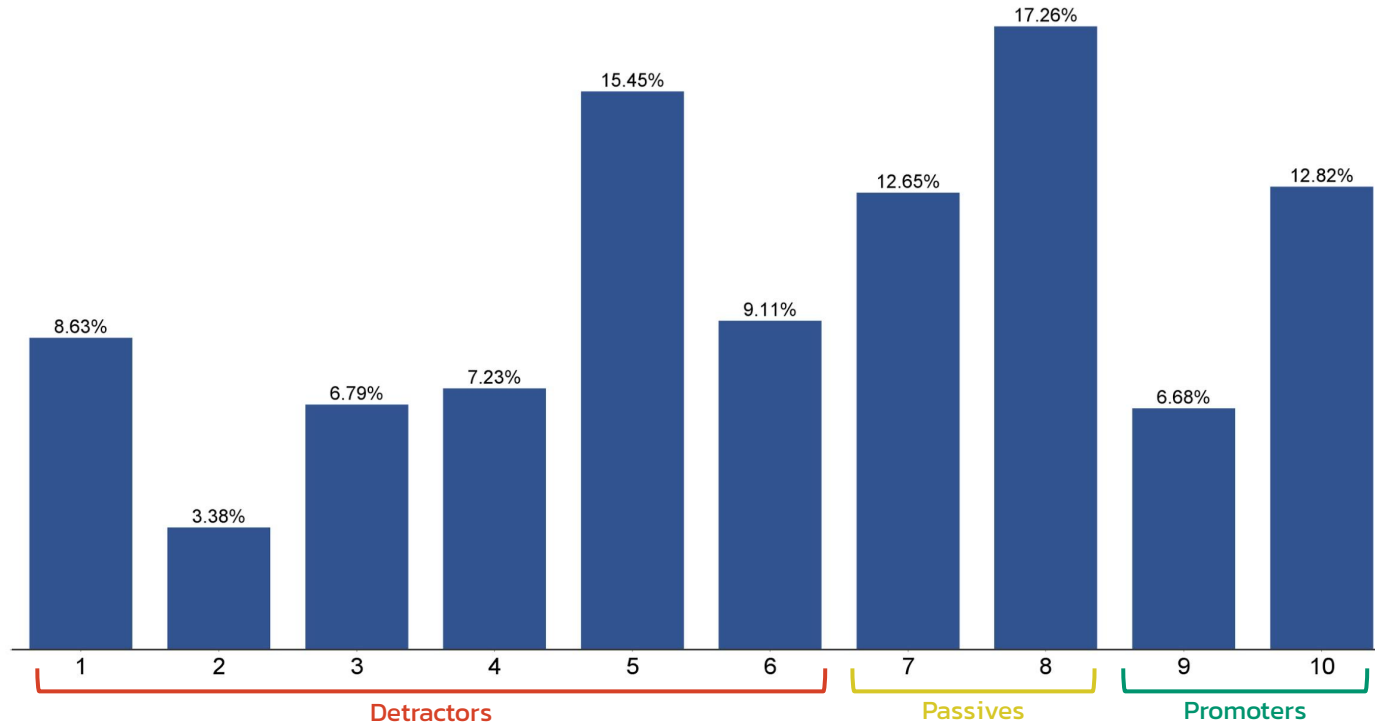
**The Math:** Promoters (9–10); Passives (7–8); Detractors (1–6)

**Promoters–Detractors = Net Promoter Score**

Passives are not counted

# Brand Barometer

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely,"  
how likely would you be to recommend... *Living in Fayetteville*



# Brand Barometer

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely,"  
how likely would you be to recommend... *Living in Fayetteville*

-31.09%

Overall Brand Advocacy Score

*Living in Fayetteville*

(% of Promoters minus % of Detractors)

# Brand Barometer

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely,"  
how likely would you be to recommend... *Visiting **Fayetteville***

-15.45%

**Overall Brand Advocacy Score**

***Visiting Fayetteville***

(% of Promoters minus % of Detractors)

# Brand Barometer

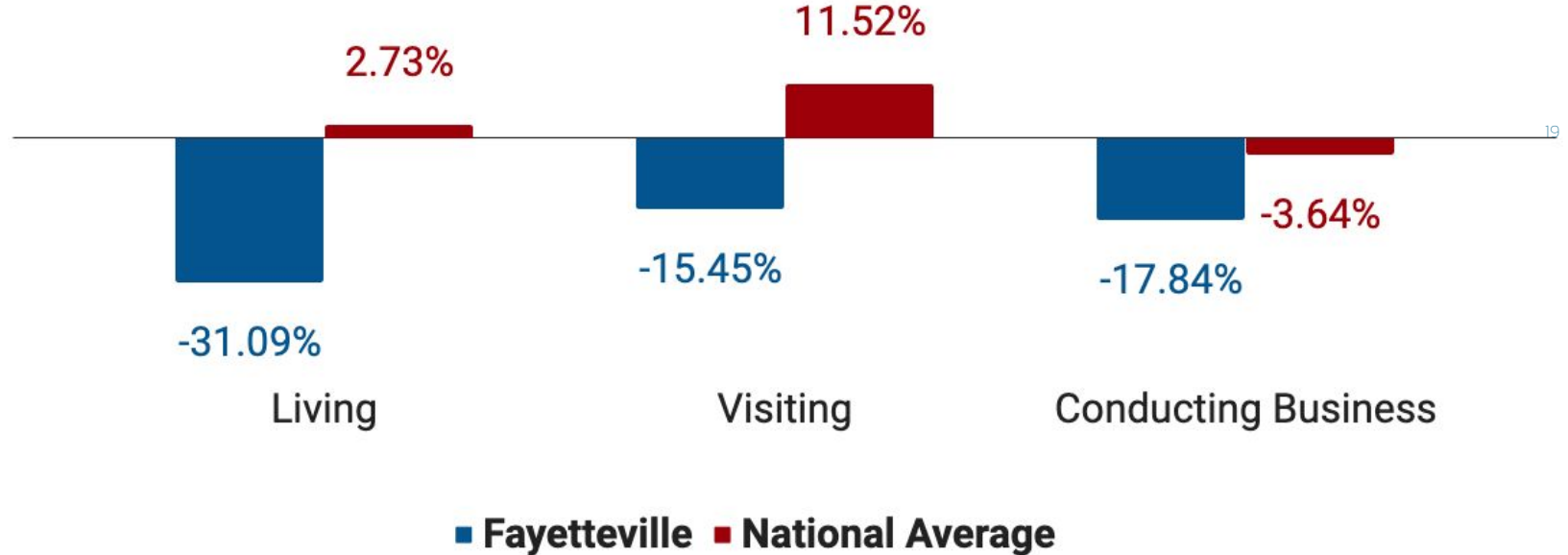
On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely,"  
how likely would you be to recommend... *Conducting Business in **Fayetteville***

-17.84%

**Overall Brand Advocacy Score**  
***Conducting Business in Fayetteville***  
(% of Promoters minus % of Detractors)

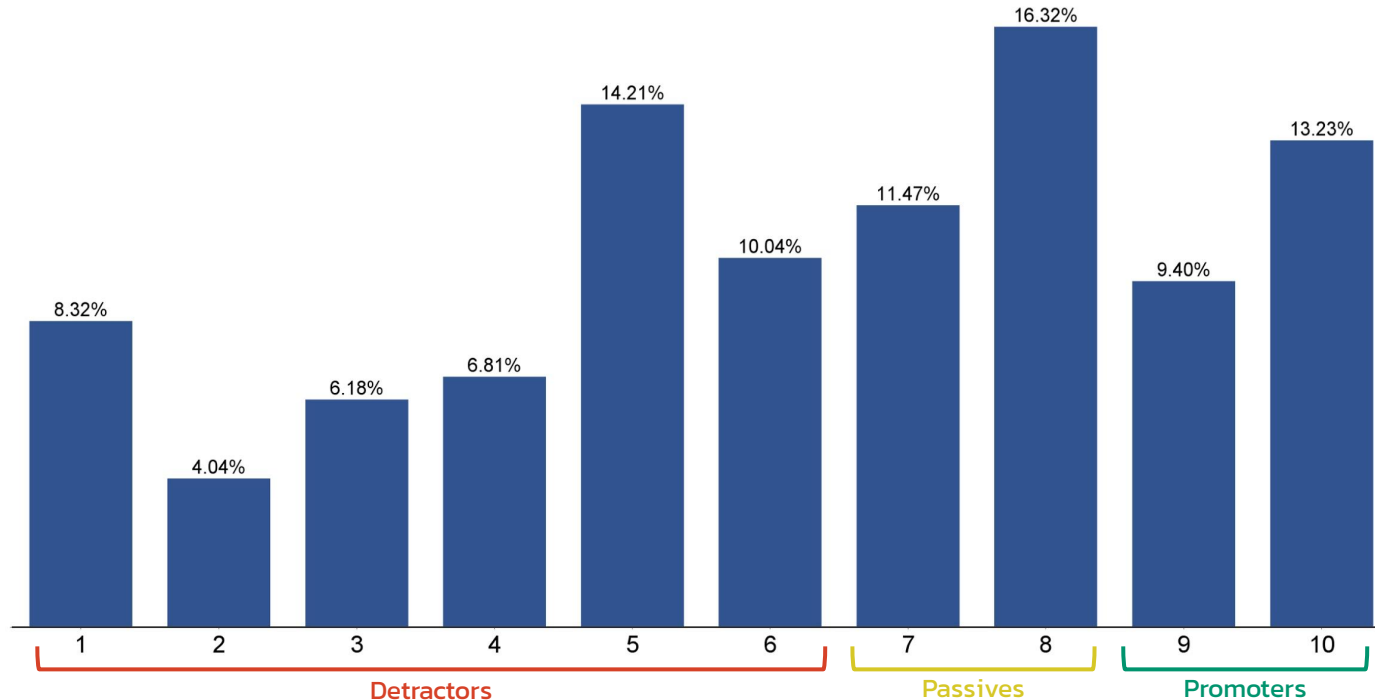
# Brand Barometer

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely,"  
how likely would you be to recommend Fayetteville to a friend or colleague...



# Brand Barometer

On a scale of 1 to 10 with 1 being "not at all likely" and 10 being "extremely likely,"  
how likely would you be to recommend... *Living in **Cumberland County***





# Brand Barometer

On a scale of 1 to 10 with 1 being "not at all likely" and 10 being "extremely likely,"  
how likely would you be to recommend... *Living in **Cumberland County***

—26.97%

**Overall Brand Advocacy Score**  
***Living in Cumberland County***  
(% of Promoters minus % of Detractors)

# Brand Barometer

On a scale of 1 to 10 with 1 being "not at all likely" and 10 being "extremely likely,"  
how likely would you be to recommend... *Visiting **Cumberland County***

-21.58%

**Overall Brand Advocacy Score**

***Visiting Cumberland County***

(% of Promoters minus % of Detractors)

# Brand Barometer

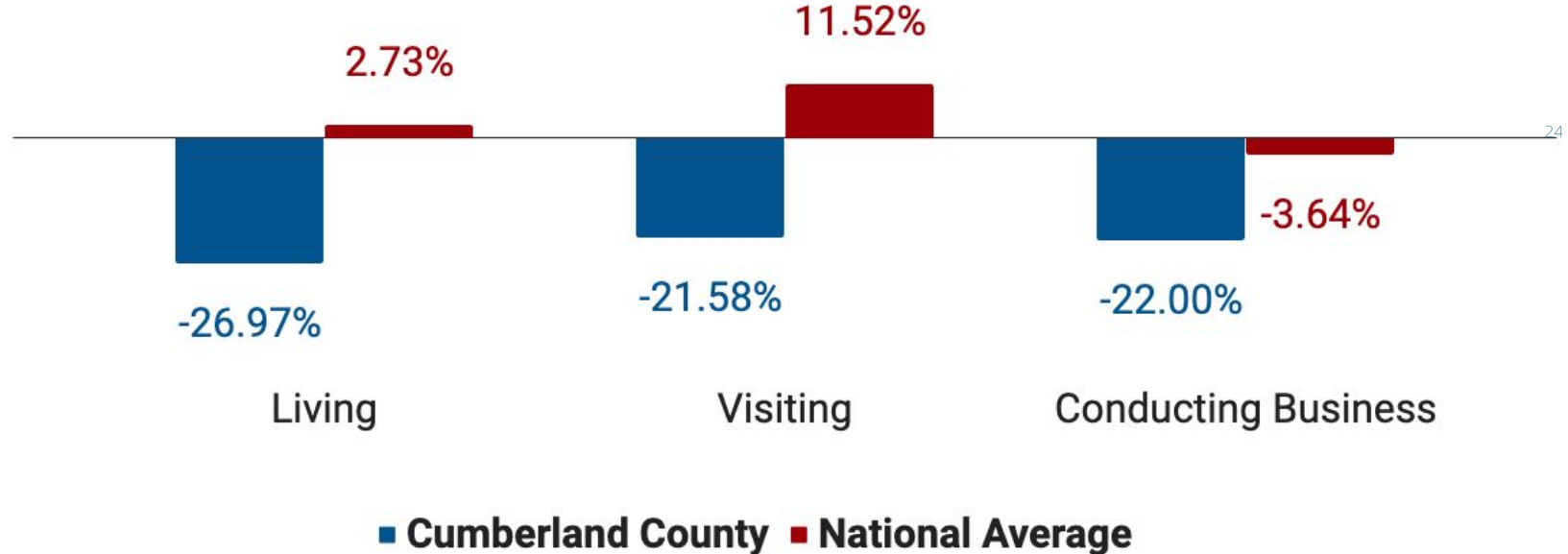
On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend... *Conducting Business in **Cumberland County***

-22.00%

**Overall Brand Advocacy Score**  
***Conducting Business in Cumberland County***  
(% of Promoters minus % of Detractors)

# Brand Barometer

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend Cumberland County to a friend or colleague...



# Fayetteville & Cumberland County

## INTERNAL PERCEPTIONS/SITE VISIT

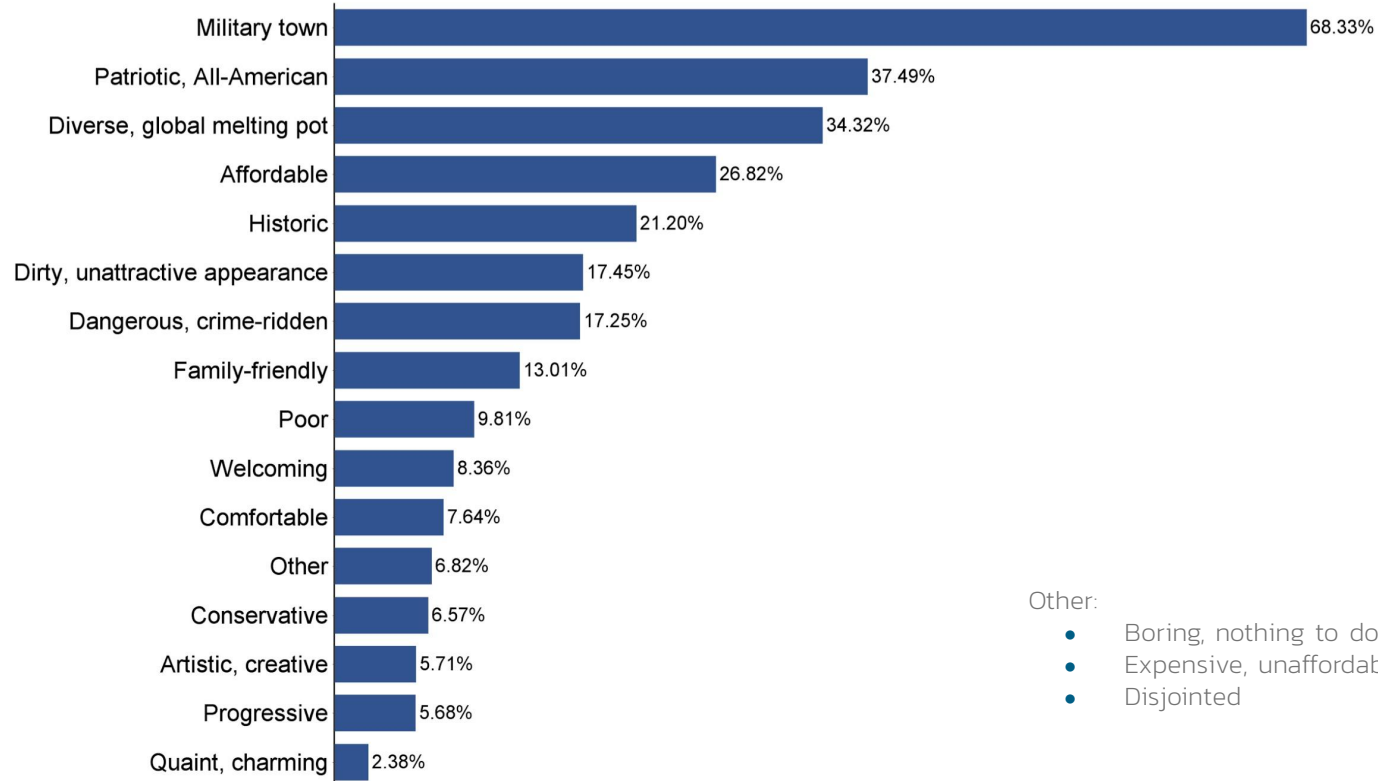
### One Word Descriptions

Patriotic  
Resilient  
Caring, serving  
Misfits/underdogs  
Vibrant  
Charming  
"Fayettenam"  
Easily accessed  
Diverse  
Small town

Proud  
Family-oriented  
Under-valued  
82nd Airborne  
Welcoming  
Inclusive  
Hardworking  
All-American  
Driven  
Midpoint

# Community Survey

Which of the following are the best descriptors for **Fayetteville**?  
*Choose up to three answers only.*

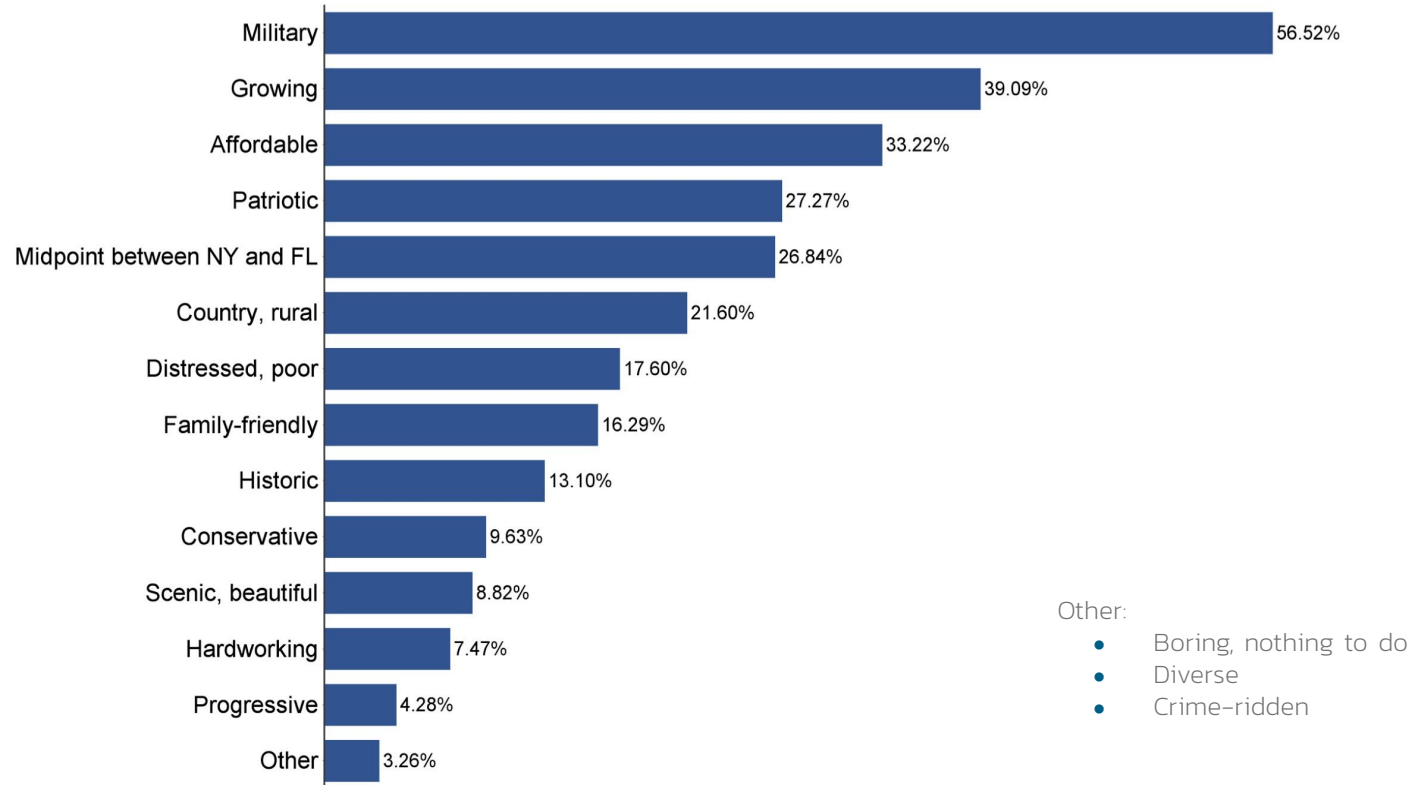


Other:

- Boring, nothing to do
- Expensive, unaffordable
- Disjointed

# Community Survey

Which of the following are the best descriptors for **Cumberland County**?  
*Choose up to three answers only.*



# Fayetteville & Cumberland County

## INTERNAL PERCEPTIONS/SITE VISIT

### Greatest Assets

Skilled workforce

7,000 Bragg retirees  
available annually

Cost of living/value

Beaches and  
mountains proximity

Warm, accepting people

Location, accessibility (I-95)

Secondary education

Airborne and Special Ops  
Museum (ASOM)

Arts scene, culture

Higher education institutions

Cape Fear River

Baseball stadium

People look out for each other<sup>28</sup>

Faith-based community

Diversity, melting pot of Carolinas

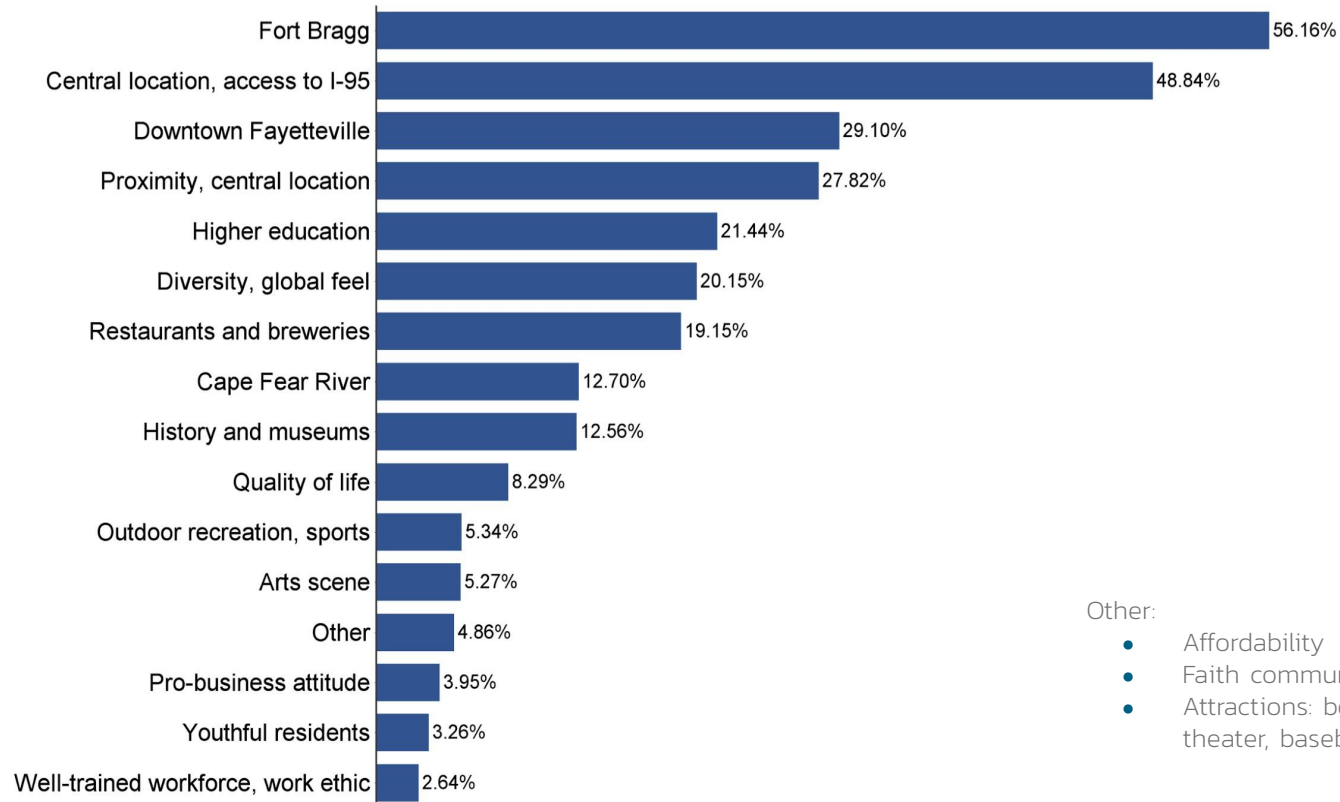
Real America – microcosm  
of America

Community of strong work  
ethic, honest nature



# Community Survey

In your opinion, what are **Fayetteville's** three greatest assets?  
*Choose up to three answers only.*

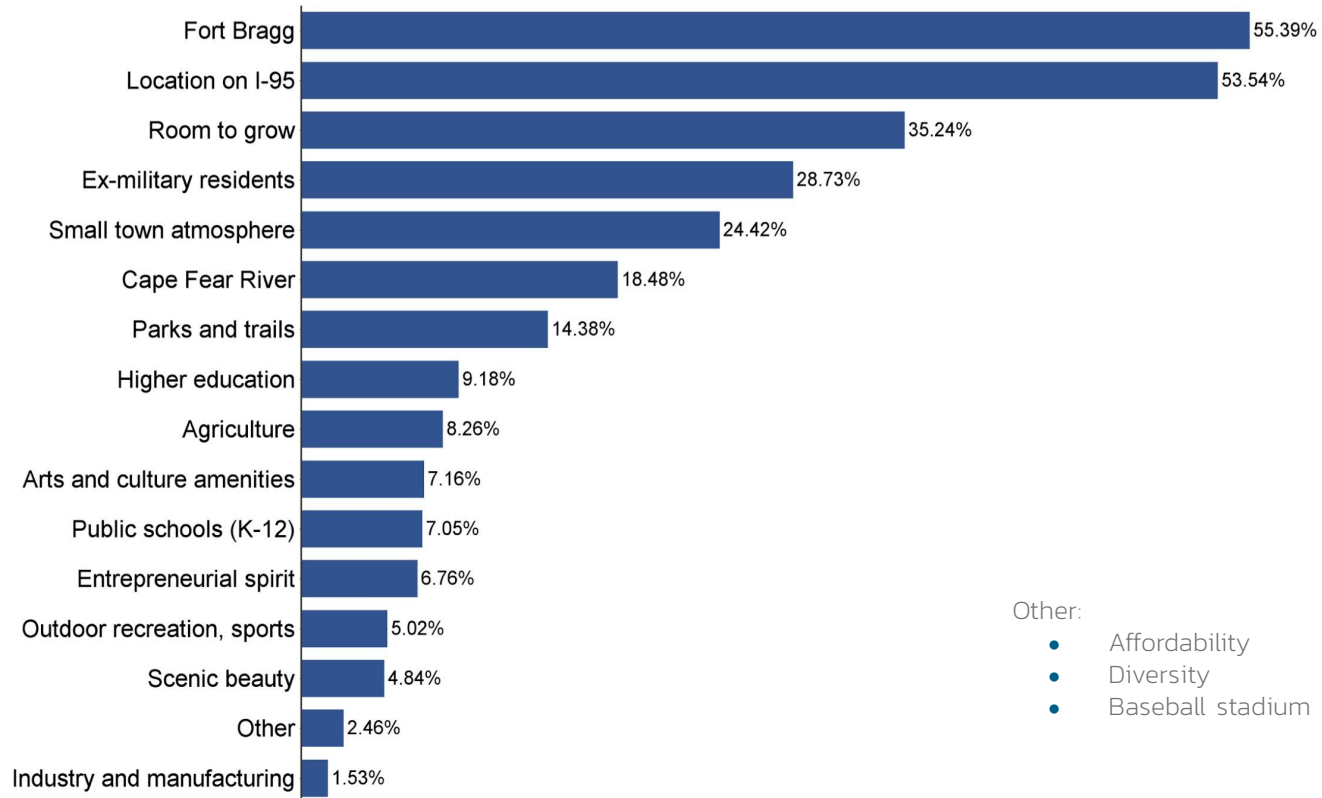


Other:

- Affordability
- Faith community
- Attractions: botanical garden, theater, baseball stadium

# Community Survey

In your opinion, what are **Cumberland County's** three greatest assets?  
*Choose up to three answers only.*



# Fayetteville & Cumberland County

## INTERNAL PERCEPTIONS/SITE VISIT

### Most Important To Identity

Ft. Bragg

Market House

Cool Spring district

Iron Mike

Dogwood Festival

Public art

International Folk

Festival

82nd Airborne

Crown Center Complex

ASOM

Systel Building

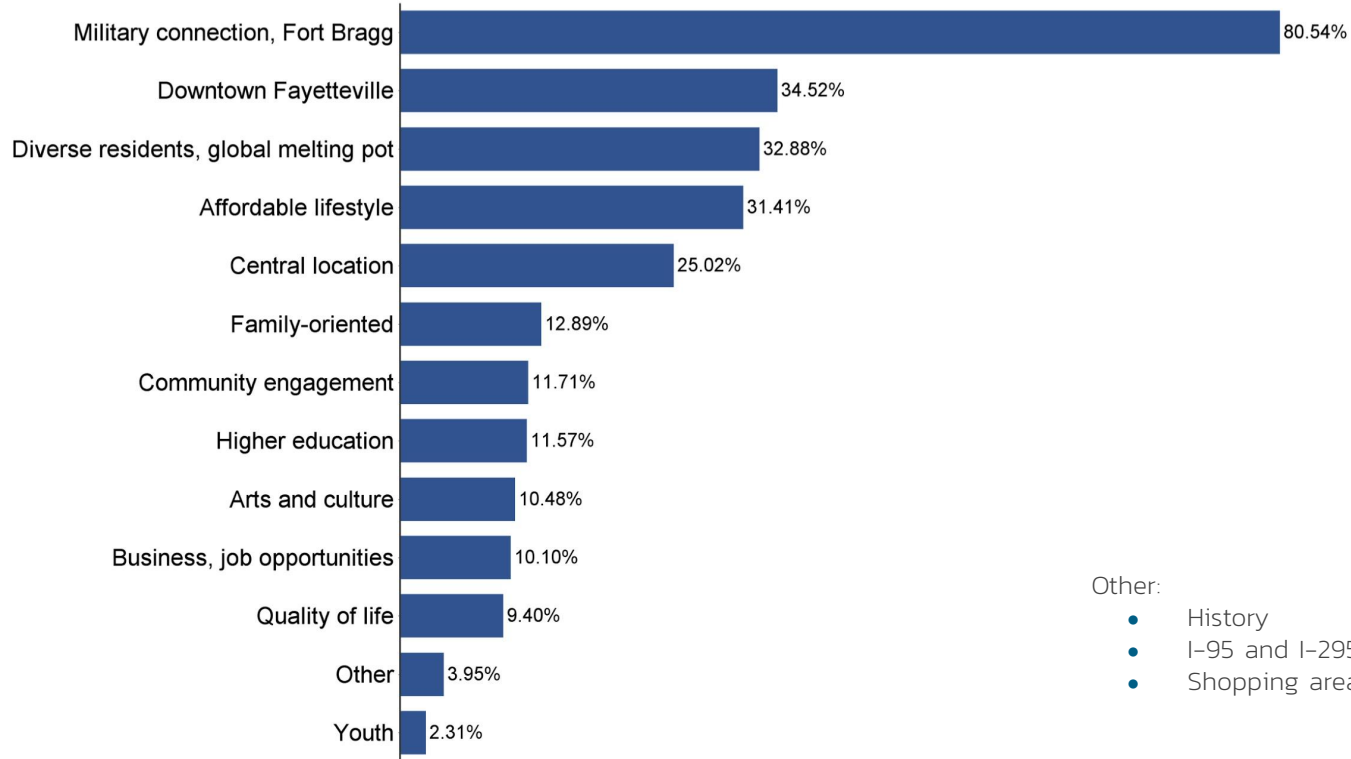
Baseball stadium

Cape Fear River Trail

Military jumps

# Community Survey

In your opinion, what three things are most important to **Fayetteville's** identity as a community (without these things, **Fayetteville** loses its essence)?  
*Choose up to three answers only.*

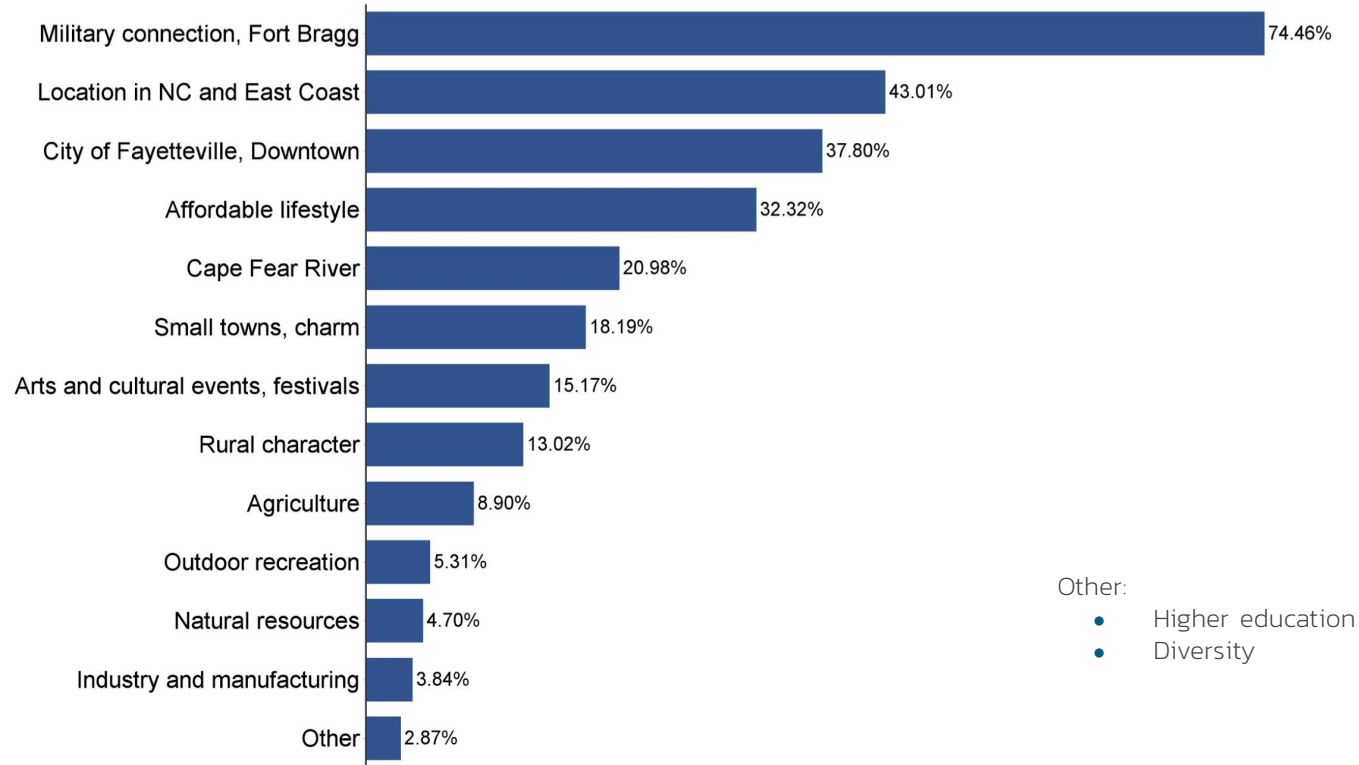


Other:

- History
- I-95 and I-295
- Shopping areas

# Community Survey

In your opinion, what three things are most important to **Cumberland County's** identity as a community (without these things, **Cumberland County** loses its essence)?  
*Choose up to three answers only.*



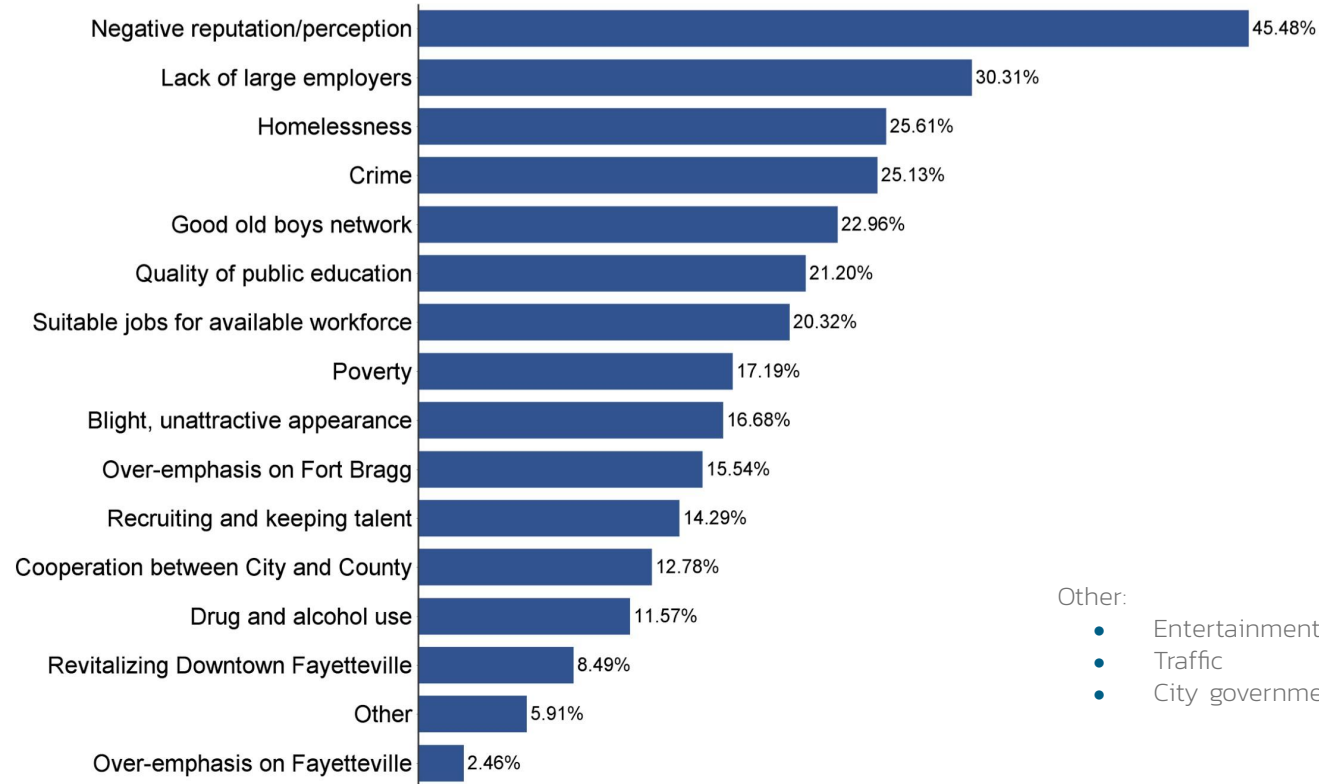
## Challenges

- Community undervalues itself, low self-esteem
- Opportunities for retaining skilled workforce
- Underemployment on less skilled side of scale
- Strong economic dependence on Ft. Bragg
- Lack of family-oriented activities
- Limited activities and nightlife for young adults
- Past moniker/perception of unsafe/unsavory downtown
- Getting visitors downtown beyond ASOM
- Retaining young people (transience or return after college)
- Strained relationship between City and County
- Combating poverty in the community
- Integrating Ft. Bragg residents/families into the community
- Introducing/marketing Fayetteville to Ft. Bragg families and retirees
- Downtown development regulations
- Moore County residential pull

# Community Survey

In your opinion, what are the greatest challenges currently facing  
**Fayetteville** and **Cumberland County**?

*Choose up to three answers only.*



Other:

- Entertainment options
- Traffic
- City government

# Fayetteville & Cumberland County

INTERNAL PERCEPTIONS/SITE VISIT

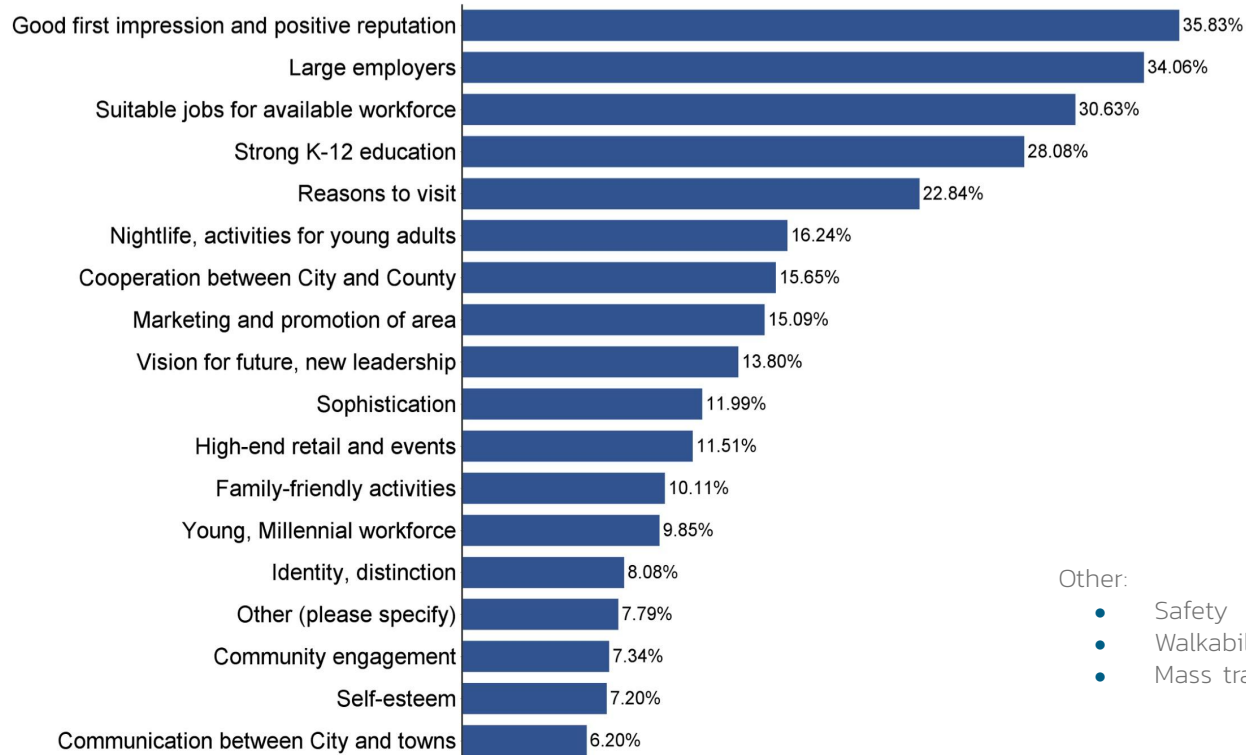
## Missing

- Diversity (of industries) and depth of job market
- Active outdoor programming (e.g. Cape Fear River Trail)
- Activities for youth and millennials
- Infrastructure and transportation, walkability
- Opportunity for financial growth
- Employment opportunities for new college graduates
- Waterfront activation and activities
- Sense of local pride
- Performing arts center
- Night scene for young people
- Non-DOD jobs
- Stronger Ft. Bragg communication and connection
- Understanding of the community story beyond Ft. Bragg
- Better mobilizing military retirees to help the city/county attract/retain Bragg personnel
- Downtown ice cream parlor; downtown craft distillery



# Community Survey

In your opinion, what is missing in **Fayetteville** and **Cumberland County**?  
*Choose up to three answers only.*



Other:

- Safety
- Walkability, park trails
- Mass transit/traffic flow solution

# Fayetteville & Cumberland County

INTERNAL PERCEPTIONS/SITE VISIT

## Greatest Opportunities

- Leverage the momentum building – now is the time to diversify and build off of the great foundation Bragg has provided
- Change the narrative to one people are proud to tell
- Establishing a unified story and front (bury Fayetteham)
- Embrace work ethic, grit and pride of local residents
- Build in ideal logistical location along I-95
- Further leverage highly skilled workers/defense contractors from Ft. Bragg
- Cultural assets of large urban area combined with rural lifestyle
- Making the diverse cultures and experiences more accessible and connected
- Keep downtown on upward trajectory
- Further leveraging and building outdoor recreational assets for continuously improved sense of place and quality of life
- Beautification mindset

# Stakeholder Survey

134 community leaders surveyed

# Stakeholder Survey

## DIFFERENTIATORS

Fayetteville should be known as a place for...  
(i.e., arts, education, entertainment, business, food scene, etc.)

- Entertainment
- Arts
- Food and drink
- Small businesses
- Education
- International community
- Jobs
- Family-friendliness
- Downtown
- Sports and outdoor recreation

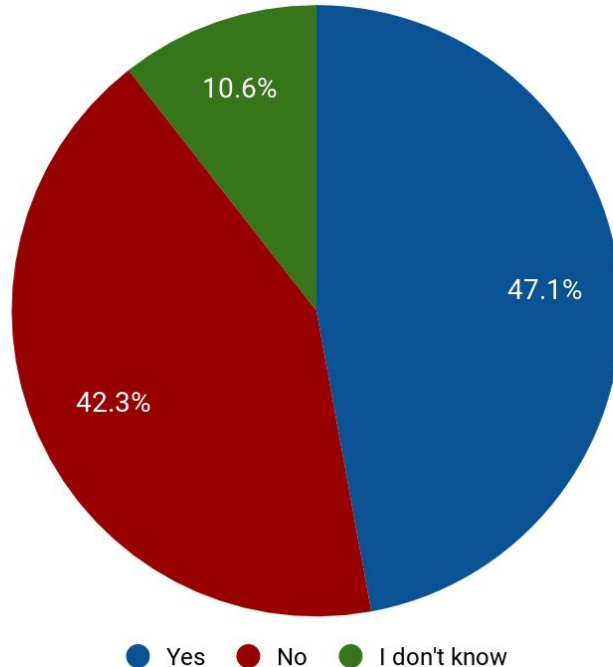
Cumberland County should be known as a place for...  
(i.e., arts, education, entertainment, business, food scene, etc.)

- Outdoor recreation
- Good quality of life
- Industry
- Small businesses
- Education
- Possibility for both urban and rural lifestyle
- Agriculture
- Arts
- Entertainment
- Central location

# Stakeholder Survey

## BUSINESS ATTITUDES

Do you consider Fayetteville to be business friendly?



Why or why not?

### Business Friendly

- Think so due to many small businesses here plus retiring military with varied skills
- There is so much growth at this time and younger folks are moving back
- Yes and No. We preach Shop Small but in reality, we want the big box stores. We roll out the red carpet for Walmart but Burney's Sweets has to jump through hoops just to get started.
- Commitment to downtown development, abundance of shopping options, potential of I-95 & I-295 corridors

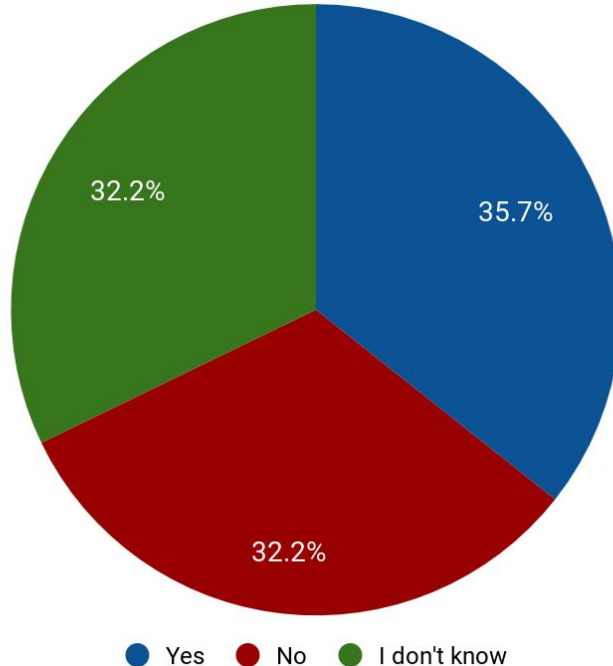
### Not Business Friendly

- We make it hard for businesses to get started with our incredibly strict UDO and lag time in getting inspectors out to businesses
- Fayetteville is not particularly attractive for families

# Stakeholder Survey

## BUSINESS ATTITUDES

Do you consider Cumberland County to be business friendly?



Why or why not?

### Business Friendly

- The county is. The deal makers aren't. We have missed many opportunities because it didn't fit the needs of a few.
- Yes, but we have lots of room for improvement.
- Potential of I-95 & I-295 corridors, riverfront development, potential for growth in eastern Cumberland County

42

### Not Business Friendly

- Not an attractive place to locate
- Struggling to prevent encroachment into established neighborhoods.
- The developers appear to have much influence over the Commissioners and over City Council, so it is hard to enforce zoning and appearance standards that seem perfectly reasonable.
- While there are many businesses, there are issues with the pipeline for professional level jobs that would lead to economic mobility for people in the community.

# Stakeholder Survey

**What is the competitive advantage for business or industry in each of the following?**

## Fayetteville

- Skilled workforce
- Location
- 95/295 Corridors
- Available space
- Affordability
- Transient
- Military
- Population
- Affordable labor
- Diversity
- Growing
- Higher education

## Cumberland County

- Skilled workforce
- Available space
- 95/295 Corridors
- Location
- Tax incentives
- Affordability
- Transient
- Affordable labor
- Military
- Small town feel
- Youth
- Diversity

# Stakeholder Survey

## What is missing in each of the following?

### Fayetteville

- Shared vision/plan
- High paying jobs
- Dining
- Entertainment
- Marketing
- Economic growth
- Educated workforce
- Quality of life
- Amenities
- Beautification
- Corporations
- Downtown development

### Cumberland County

- Marketing
- Shared vision/plan
- City/County collaboration
- High paying jobs
- Entertainment
- Identity
- Industry
- Matching talent with positions
- New leadership
- Quality of life
- Corporations
- Educated workforce



# Stakeholder Survey

## What surprises people most about each of the following?

### Fayetteville

- Downtown
- Clean
- Cosmopolitan population
- Friendliness of people
- Programming/activities
- Growth
- Nice parts of town
- Charming community
- Amenities
- History
- Military

### Cumberland County

- Size of county
- Recreation/fitness activities
- Cosmopolitan community
- Friendliness of people
- Military
- Smaller communities within the county
- Downtown Fayetteville
- Growth
- Natural beauty
- Safety of County
- Available land

# Stakeholder Survey

## What unites Fayetteville and Cumberland County?

- Military community
- Improvement/success
- The people
- They are not united
- Economic development
- Government collaboration
- Shopping and entertainment

- Diversity
- History
- Merging into one large community
- Cultural inclusivity
- Desire for positive image
- Patriotism

# Stakeholder Survey

What aspect of **Fayetteville** leaves the strongest positive impression and strongest negative impression on visitors and newcomers to the community?

## Positive Impression

- Downtown area, Hay Street
- Kindness of residents
- Military
- Amenities
- Growth/development
- ASOM
- Diversity
- Dining options
- Small town feel
- Baseball team, stadium
- City Council
- Education system

## Negative Impression

- Visually unattractive
- Crime
- Blight
- Poverty
- Gateways
- Reputation
- Bragg Blvd.
- Lack of entertainment
- Vacancies
- Murchison Road
- Poor planning
- Traffic

# Stakeholder Survey

What aspect of **Cumberland County** leaves the strongest positive impression and strongest negative impression on visitors and newcomers to the community?

## Positive Impression

- Friendliness of residents
- Natural beauty
- Rural areas
- Economic opportunity
- Growth
- Military
- Parks
- Things to do
- Diversity
- Driveability; access to I-95
- Location

## Negative Impression

- Unattractive appearance
- Blight
- Crime
- Gateways
- Lack of entertainment
- Negative messaging
- Poverty
- School performance
- Vacancies
- Need for collaboration
- Slow development
- Limited dining options

# Fayetteville & Cumberland County

## INTERNAL PERCEPTIONS

If Fayetteville and Cumberland County were a famous person...

**Marquis de Lafayette:** visionary, military ties, resilient, brave

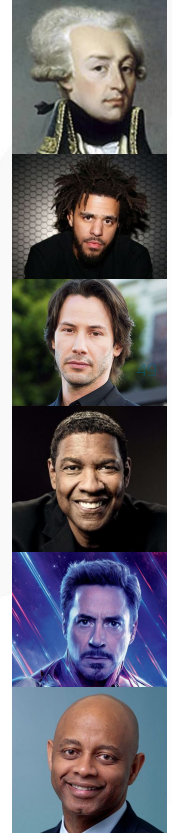
**J. Cole:** Down to earth, talented, generous to his home community, made it big but still comes home to his hometown

**Keanu Reeves:** Handsome, not flashy

**Denzel Washington:** Strong, gutsy

**Robert Downey, Jr. (as Iron Man):** smart, slightly arrogant, contrarian, ultimately selfless/helping others

**Eric Mansfield:** Committed leader, representative of the integrity and diversity of the community



## Identity

# Stakeholders

PROJECTION

If Fayetteville was a famous person, who would it be? **Why?**

Marquis de Lafayette



*Young, military ties, a vision  
for the future  
A risk taker, a person unwilling  
to take no for an answer,  
resilient, dynamic, brave.*

J. Cole



*Most famous native now  
He is proud of where he is from,  
despite it being tough. He kind of  
epitomizes the endearing, aspirational,  
working-man grit of this city. Largest  
donor to Fayetteville Urban Ministries*

Martin Luther King, Jr.



*Want change, asking for tolerance  
of all, has a vision, wants equality  
He believed what he stood  
for and wanted to bring about  
justice for all*

# Stakeholders

PROJECTION

If Cumberland County was a famous person, who would it be? **Why?**

**Andy Griffith**



*Nice, friendly, country type that tries hard to get the job done without upsetting Mayberry's residents or their way of life*

**Babe Ruth**



*The county can do great things, although still early in the process. Just like Ruth hitting his first home run in Cumberland County, with the future at that time unclear of his success – yet he made it to unheard of success.*

**Teddy Roosevelt**



*Young, energetic, loves nature, understands business, tries hard and means well, but has difficulty making things work.  
He saw potential where others did not and represented the "working man."*

# Fayetteville & Cumberland County

## INTERNAL PERCEPTIONS

If Fayetteville and Cumberland County were a car...

**4-door Silverado:** rugged, all-American, get it done

**Jeep Wrangler:** functional vehicle, outdoorsy

**SUV:** family oriented

**Toyota Camry:** utility and reliable, not flashy

**Classic Volkswagen Bug:** Practical, down to earth

**Hummer married with Minivan:** Military merged with family town



Identity



# Consumer Awareness & Perception Study

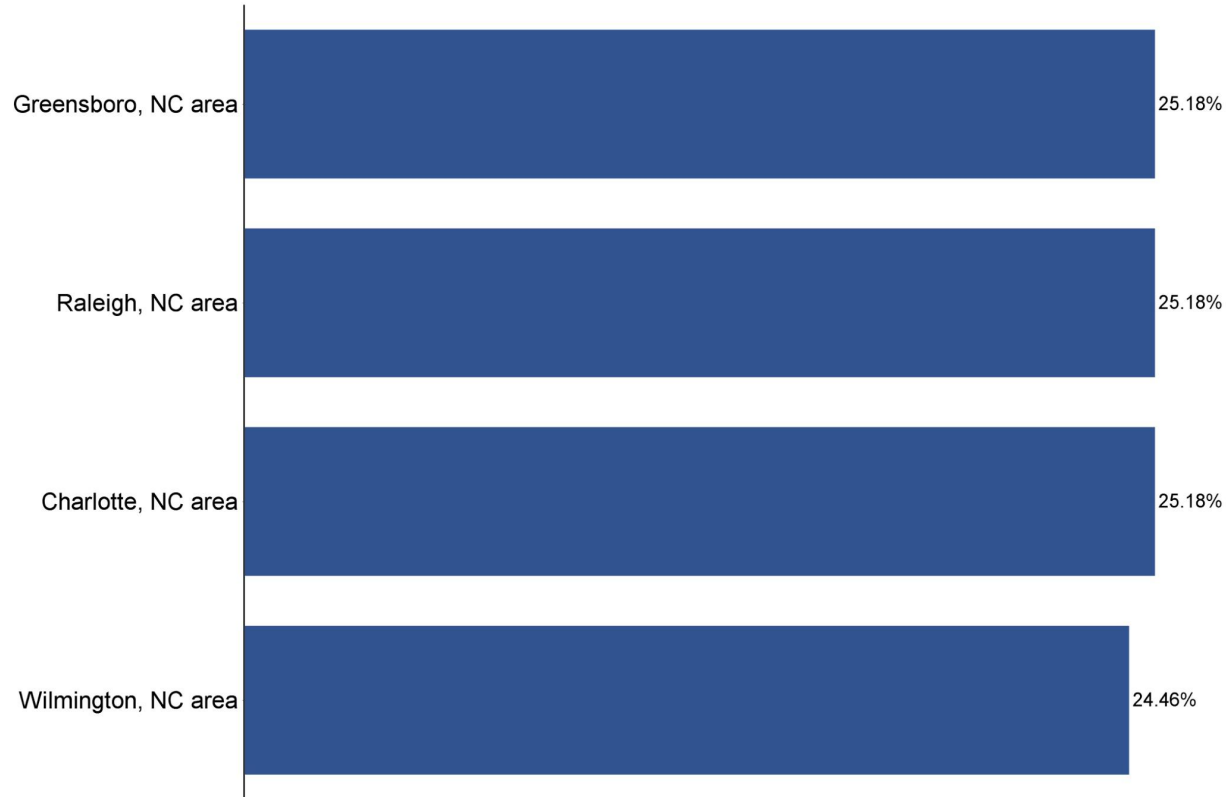
413 EXTERNAL responses

Charlotte, Greensboro, Raleigh, and Wilmington

# External Perceptions

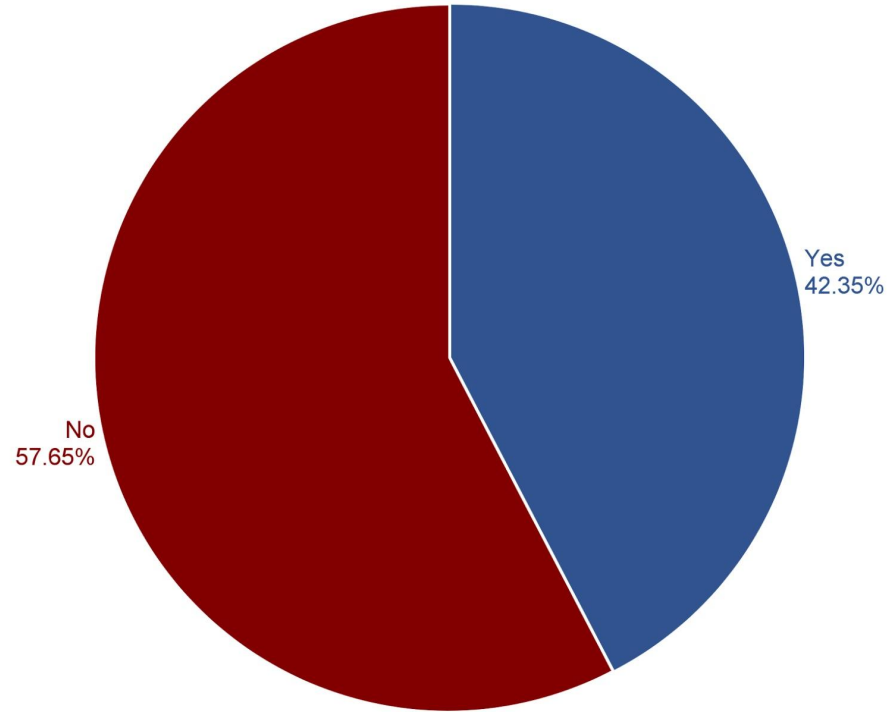
# CAP Study

In which area do you currently reside?



# CAP Study

Have you or your immediate family member ever been stationed at Fort Bragg?



# Unaided Perceptions

57

# CAP Study

What comes to mind when you think of the following **cities?**

## Durham, NC

- College town
- Minor league baseball
- Close to Raleigh
- Business

## Fayetteville, NC

- **Military/Army base**
- **Country/Rural**
- **Crime**
- **University**

## Greensboro, NC

- University
- Shopping
- Airport
- Coliseum

## Jacksonville, NC

- Military/Marine Corps Base
- Country/Rural
- Beach
- Boring

## Pinehurst/Southern Pines, NC

- Golf
- Country/Rural
- Affluent
- Nice

## Wilmington, NC

- Beach
- Battleship
- Fishing
- Shopping

# CAP Study

Without naming any cities or towns within them, what comes to mind when you think of the following **counties**?

## Forsyth County, NC

- University
- History
- Healthcare
- Agriculture

## Cumberland County, NC

- Military
- Country/Rural
- Agriculture
- History

## Guilford, NC

- Urban
- Country/Rural
- University
- Family

## Harnett County, NC

- Country/Rural
- Agriculture
- Small towns
- Conservative

## New Hanover County, NC

- Beach
- Battleship
- Good food
- Shopping

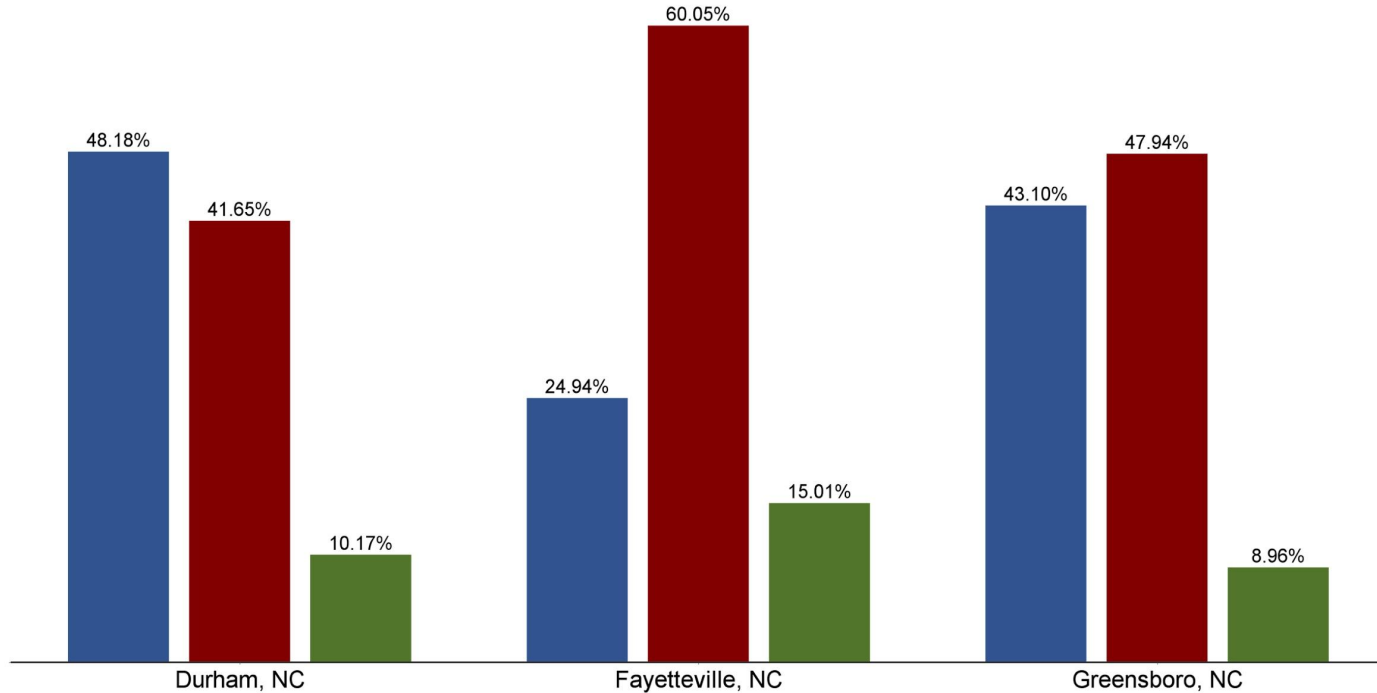
## Robeson County, NC

- Lumbee Tribe
- Country/Rural
- Crime
- History

# CAP Study

From your perspective, do you think the following cities are **on the rise**, **staying the same**, or **have their best days behind them**?

■ On the Rise ■ Staying the Same ■ Best Days Behind

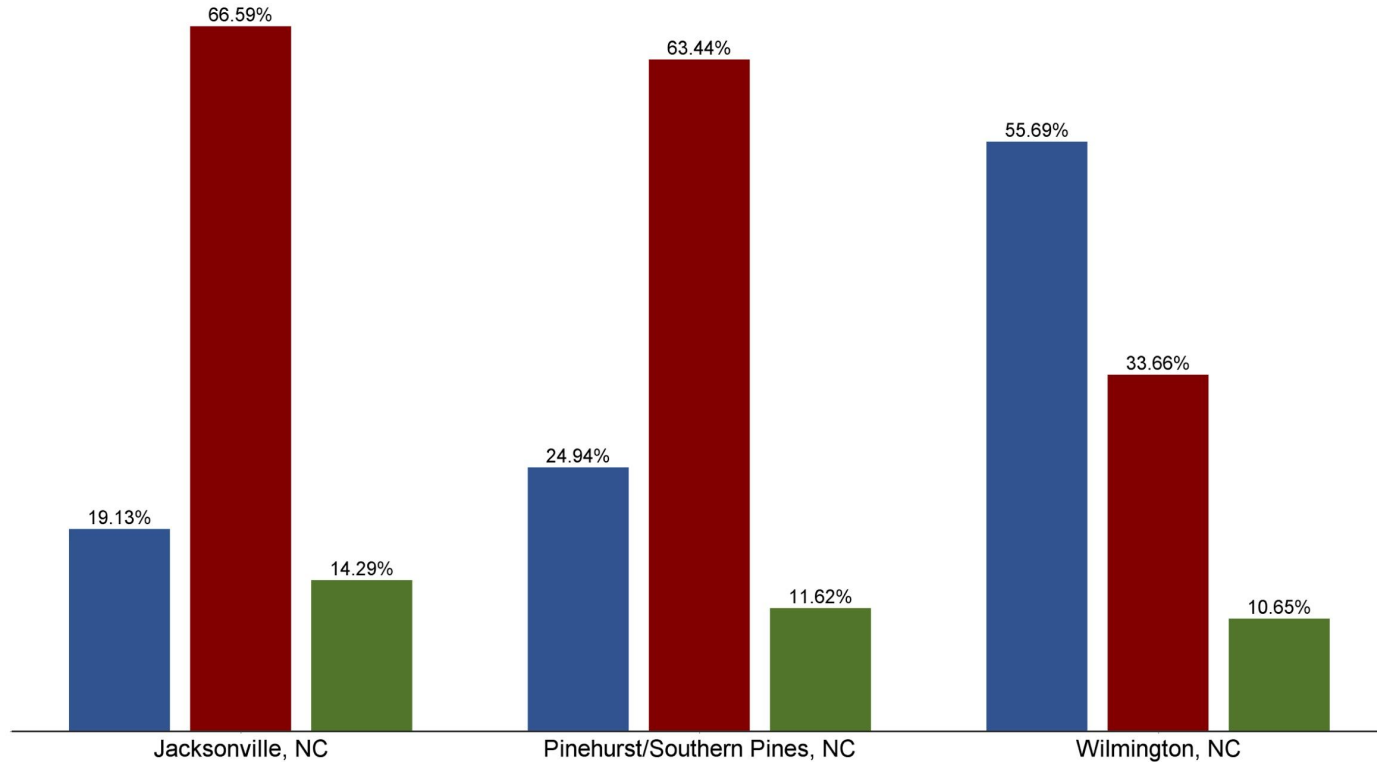




# CAP Study

From your perspective, do you think the following cities are **on the rise**, **staying the same**, or **have their best days behind them**?

■ On the Rise ■ Staying the Same ■ Best Days Behind

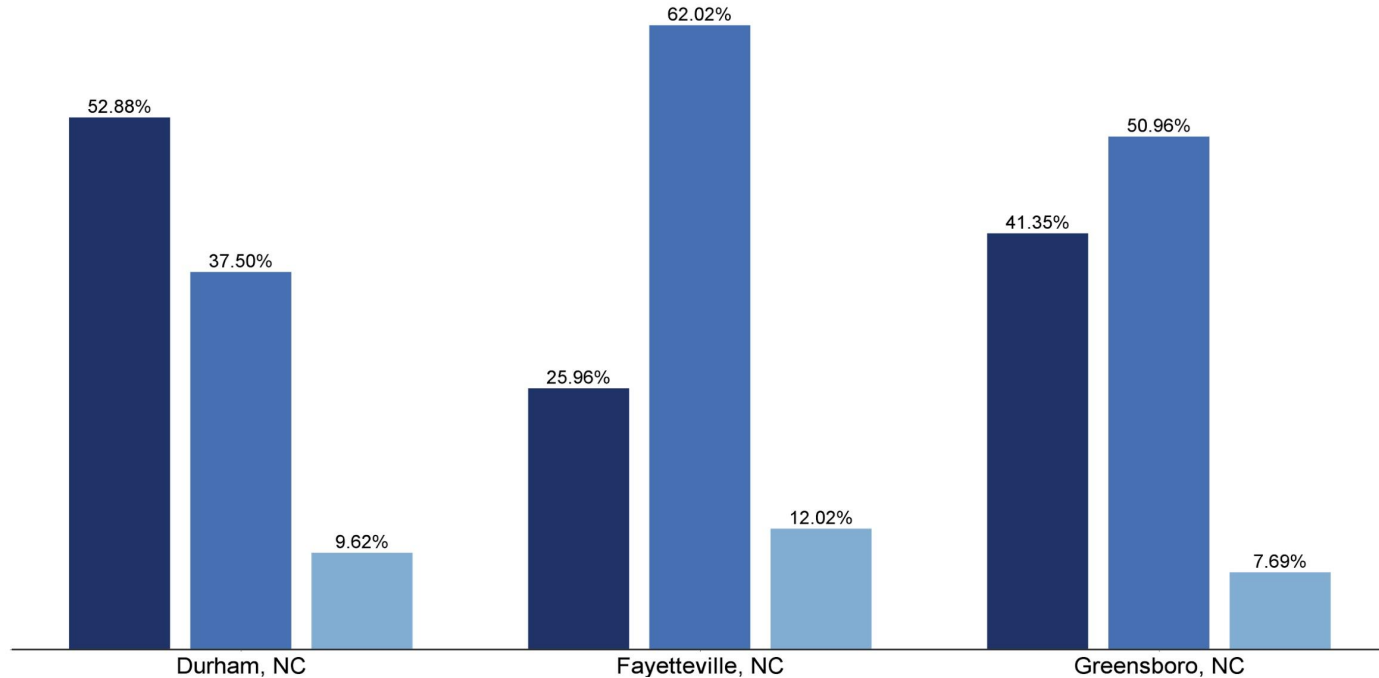


# CAP Study

CHARLOTTE & RALEIGH RESPONDENTS ONLY

From your perspective, do you think the following cities are **on the rise**, **staying the same**, or **have their best days behind them**?

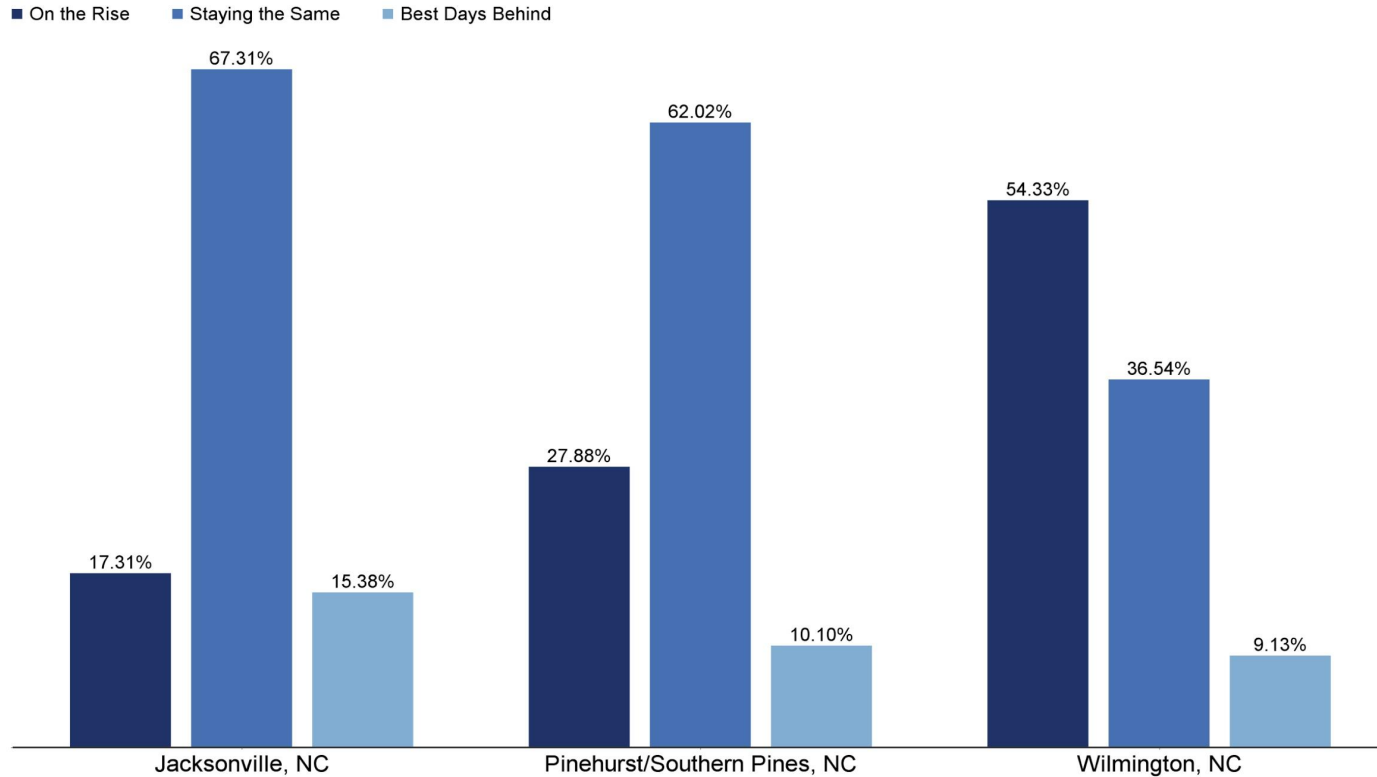
■ On the Rise   ■ Staying the Same   ■ Best Days Behind



# CAP Study

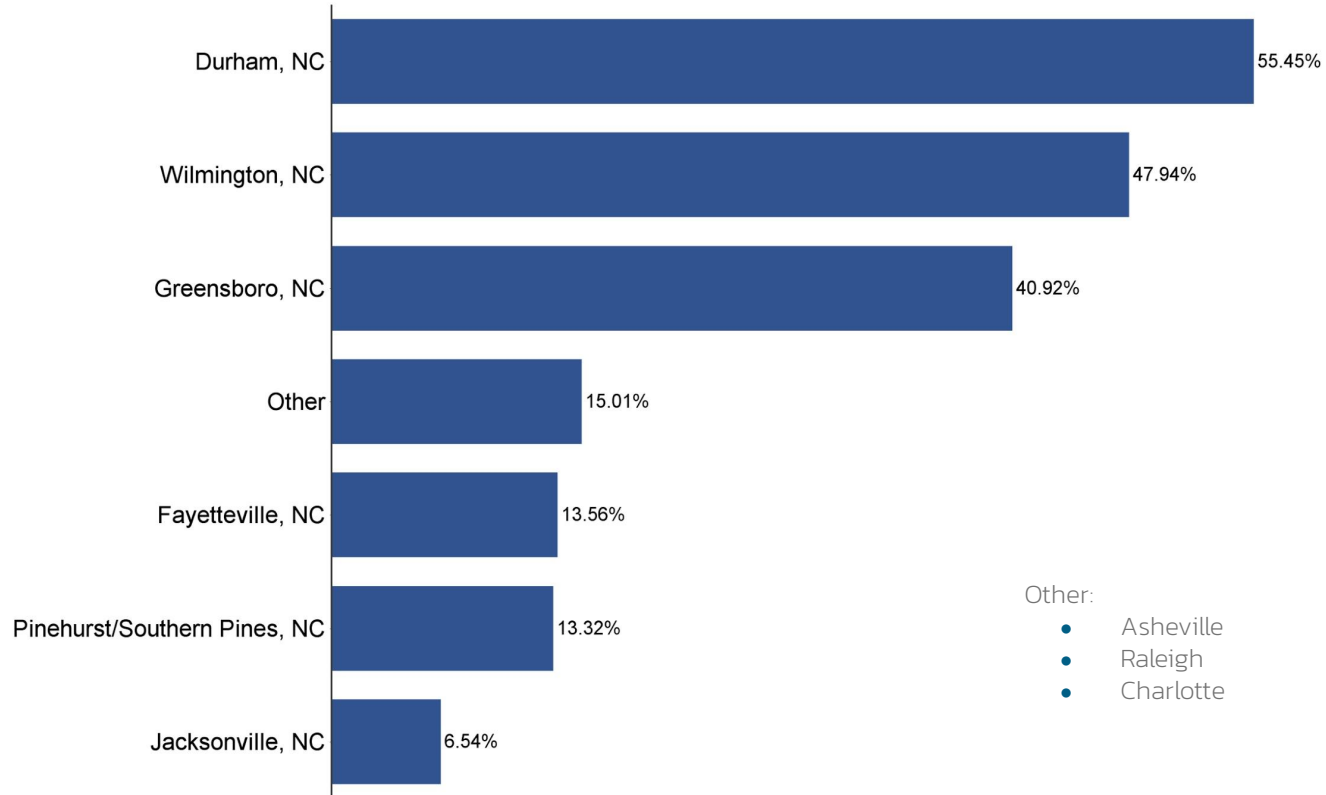
CHARLOTTE & RALEIGH RESPONDENTS ONLY

From your perspective, do you think the following cities are **on the rise**, **staying the same**, or **have their best days behind them**?



# CAP Study

Which of the following cities do you most associate with **arts and culture**?  
*Choose two answers.*

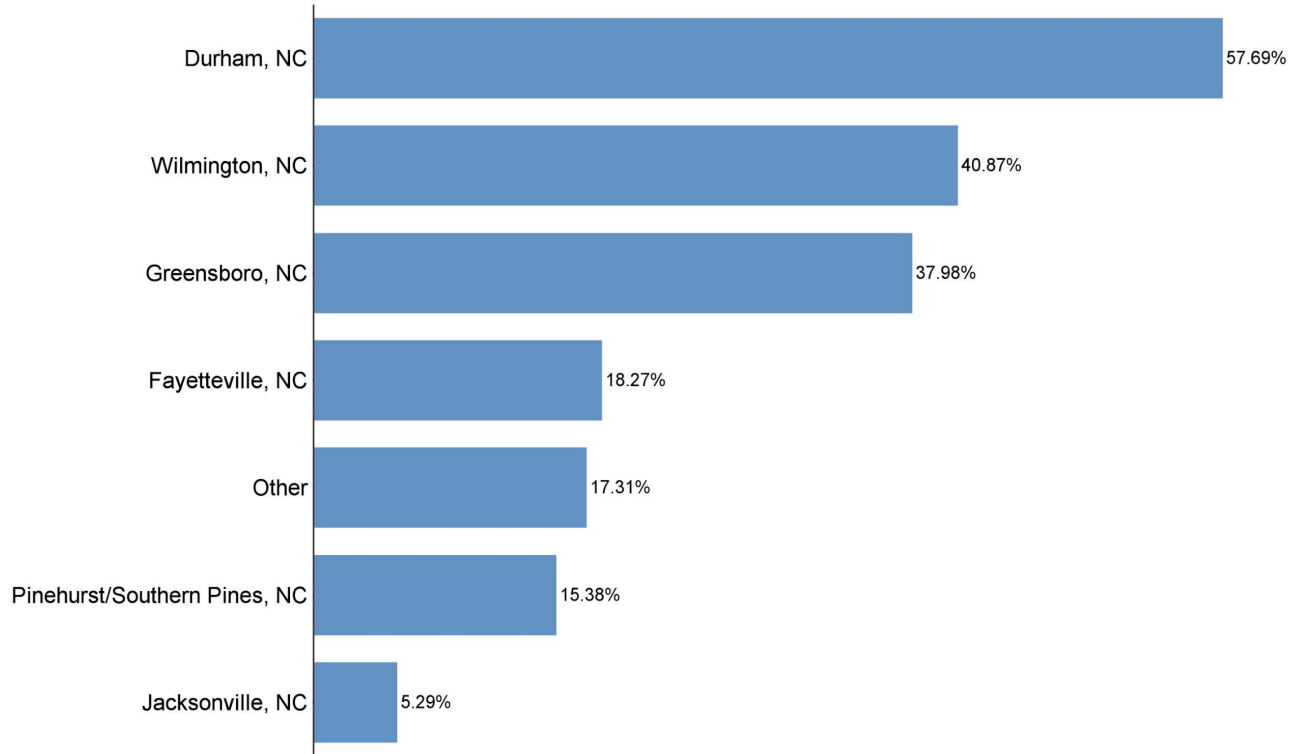


# CAP Study

CHARLOTTE & RALEIGH RESPONDENTS ONLY

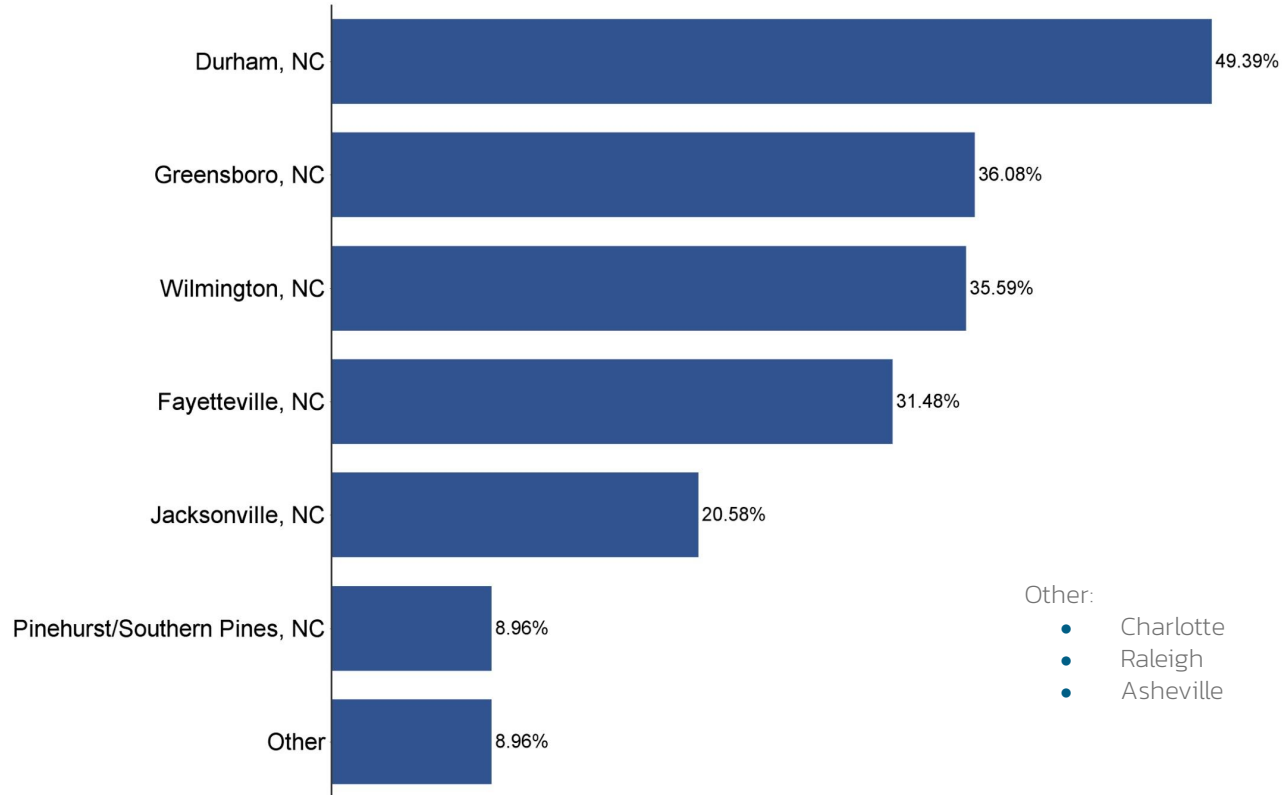
Which of the following cities do you most associate with **arts and culture**?

*Choose two answers.*



# CAP Study

Which of the following cities do you most associate with an **international culture and population**?  
*Choose two answers.*

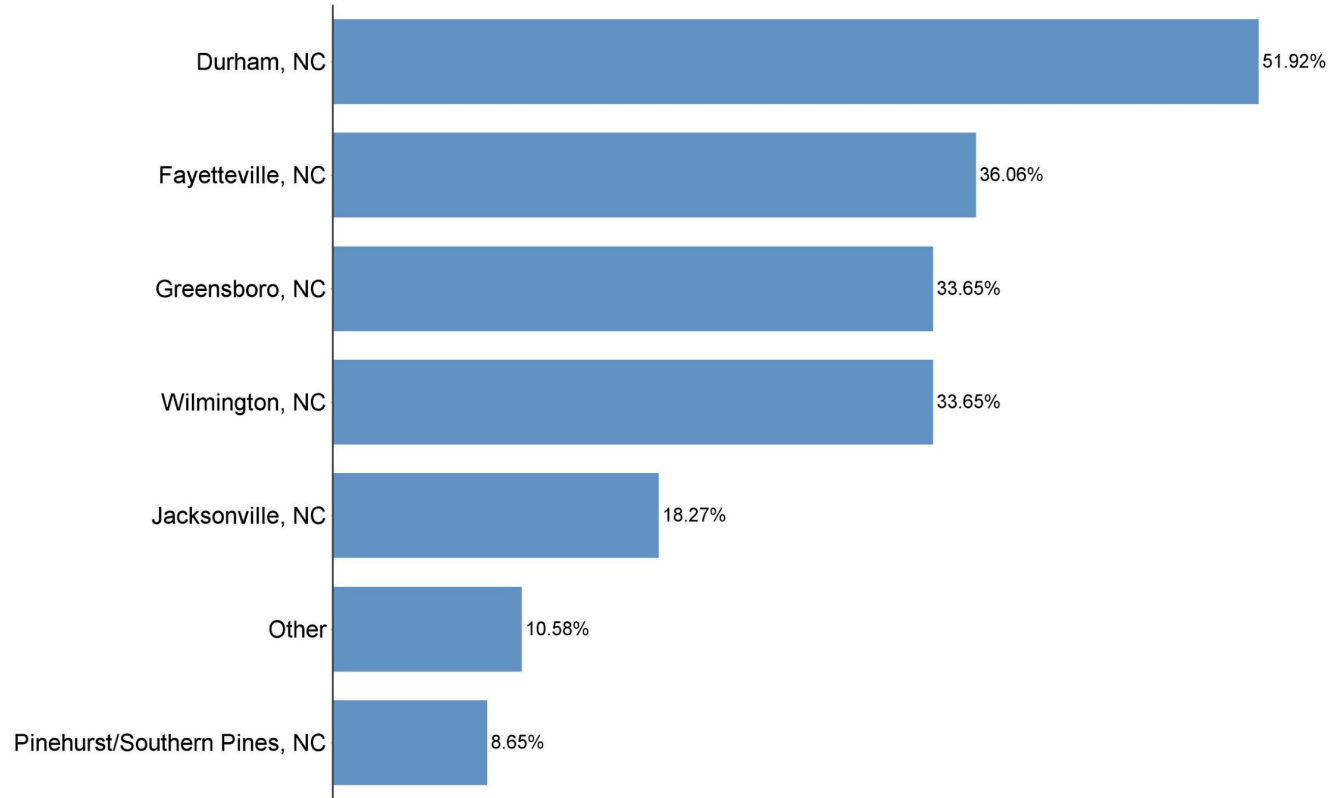


# CAP Study

CHARLOTTE & RALEIGH RESPONDENTS ONLY

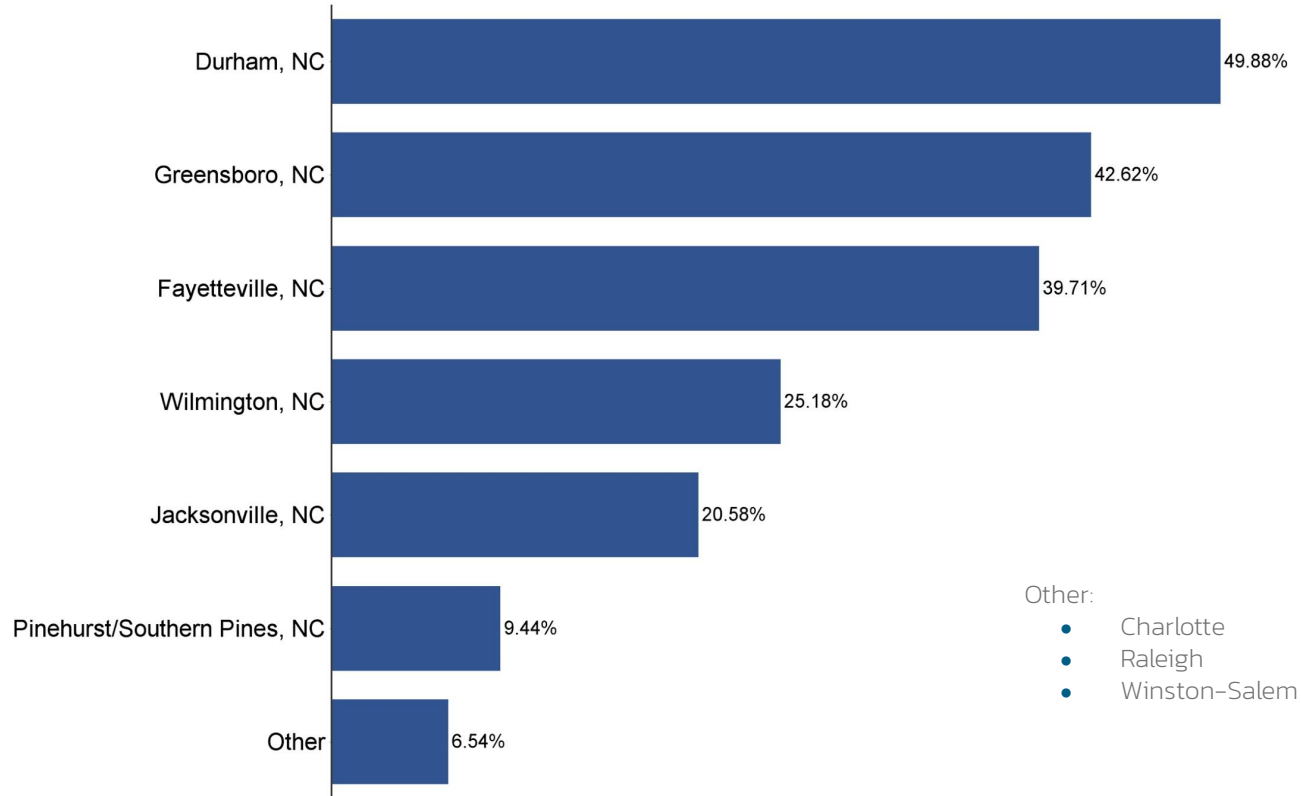
Which of the following cities do you most associate with an **international culture and population?**

*Choose two answers.*



# CAP Study

Which of the following cities do you most associate with **ethnic diversity**?  
*Choose two answers.*



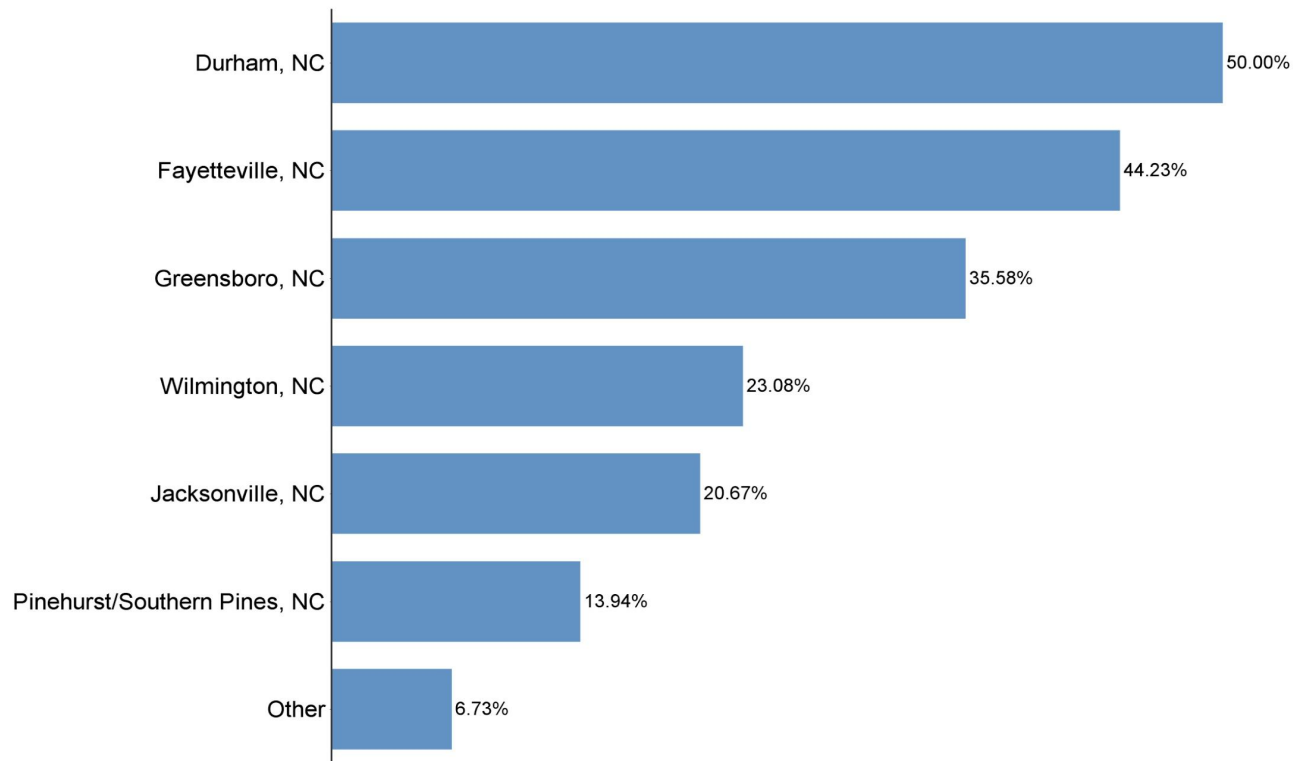


# CAP Study

## CHARLOTTE & RALEIGH RESPONDENTS ONLY

Which of the following cities do you most associate with **ethnic diversity**?

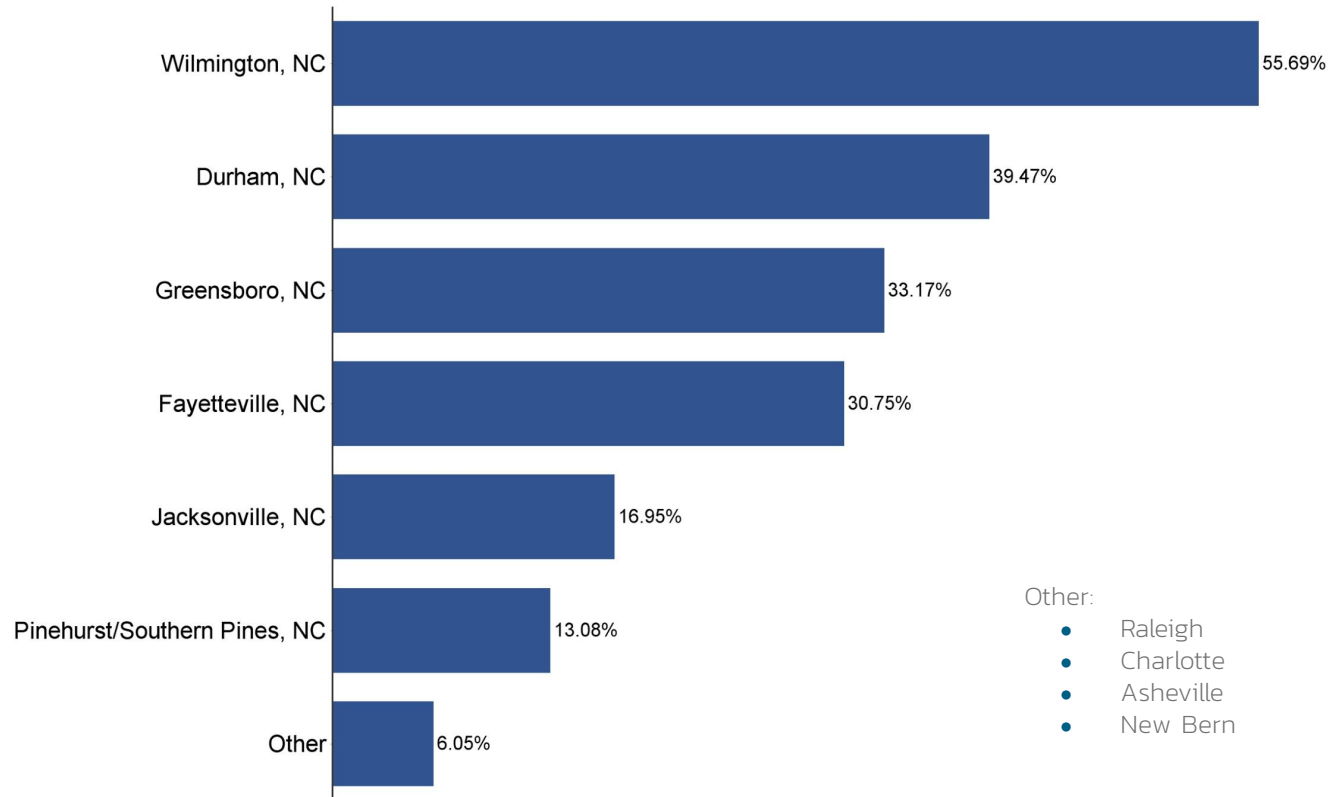
*Choose two answers.*



# CAP Study

Which of the following cities do you most associate with **interesting history**?

*Choose two answers.*

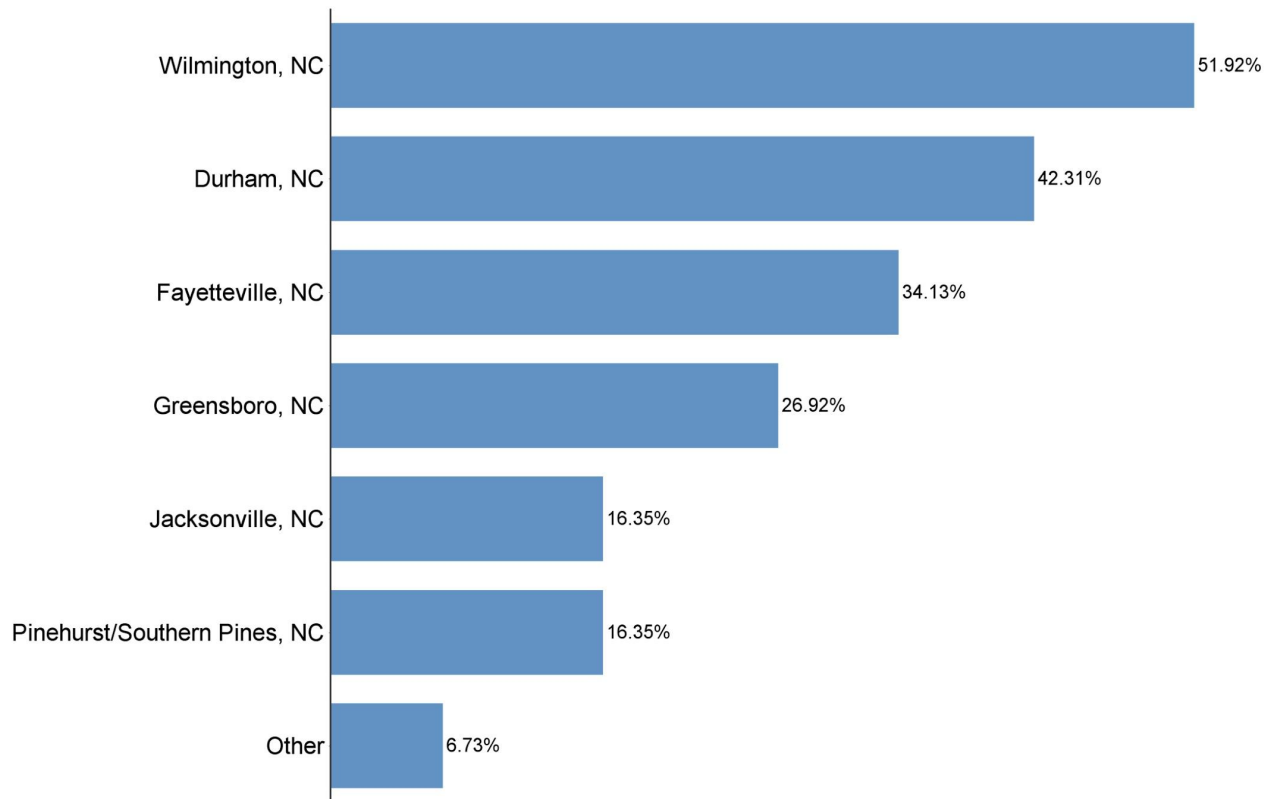


# CAP Study

CHARLOTTE & RALEIGH RESPONDENTS ONLY

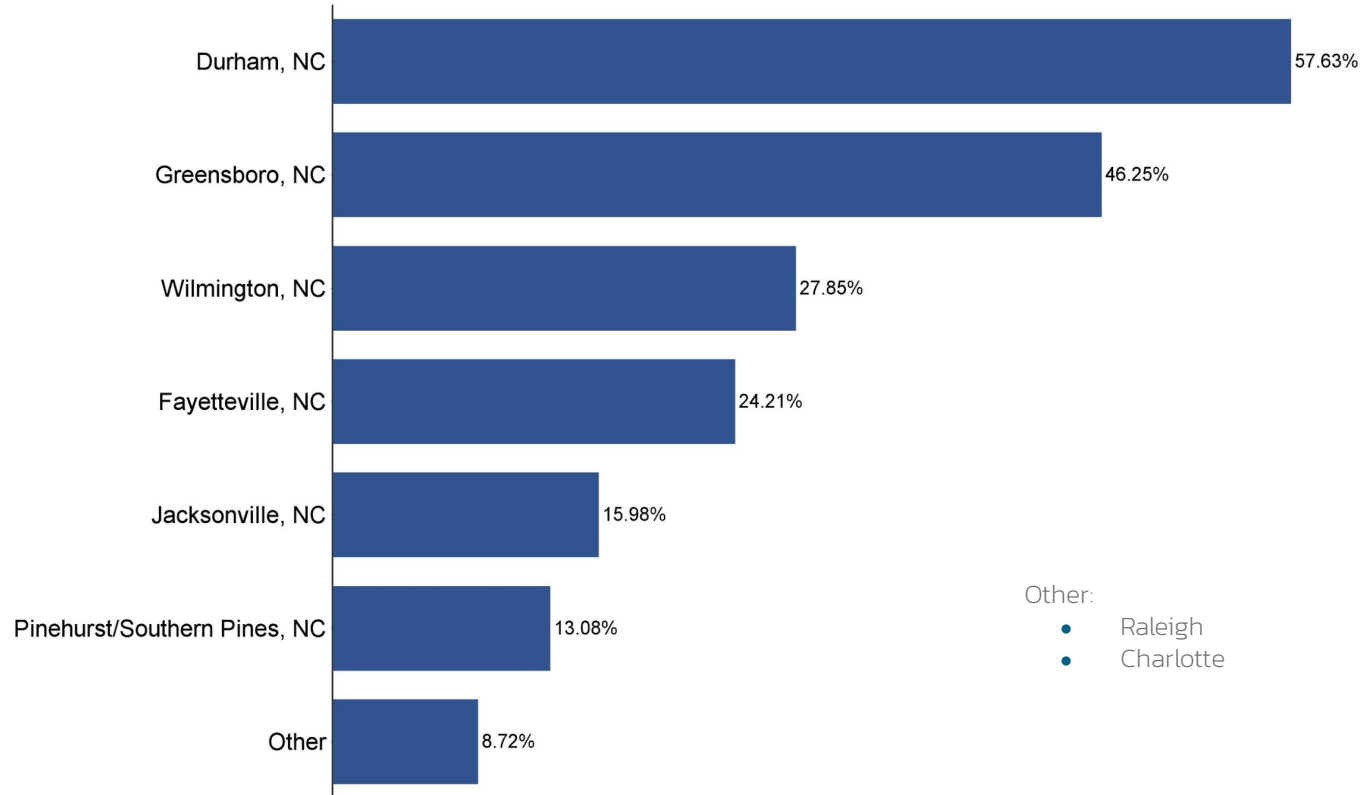
Which of the following cities do you most associate with **interesting history**?

*Choose two answers.*



# CAP Study

In which of the following cities would you expect to find **highly trained talent with advanced skills**?  
*Choose two answers.*

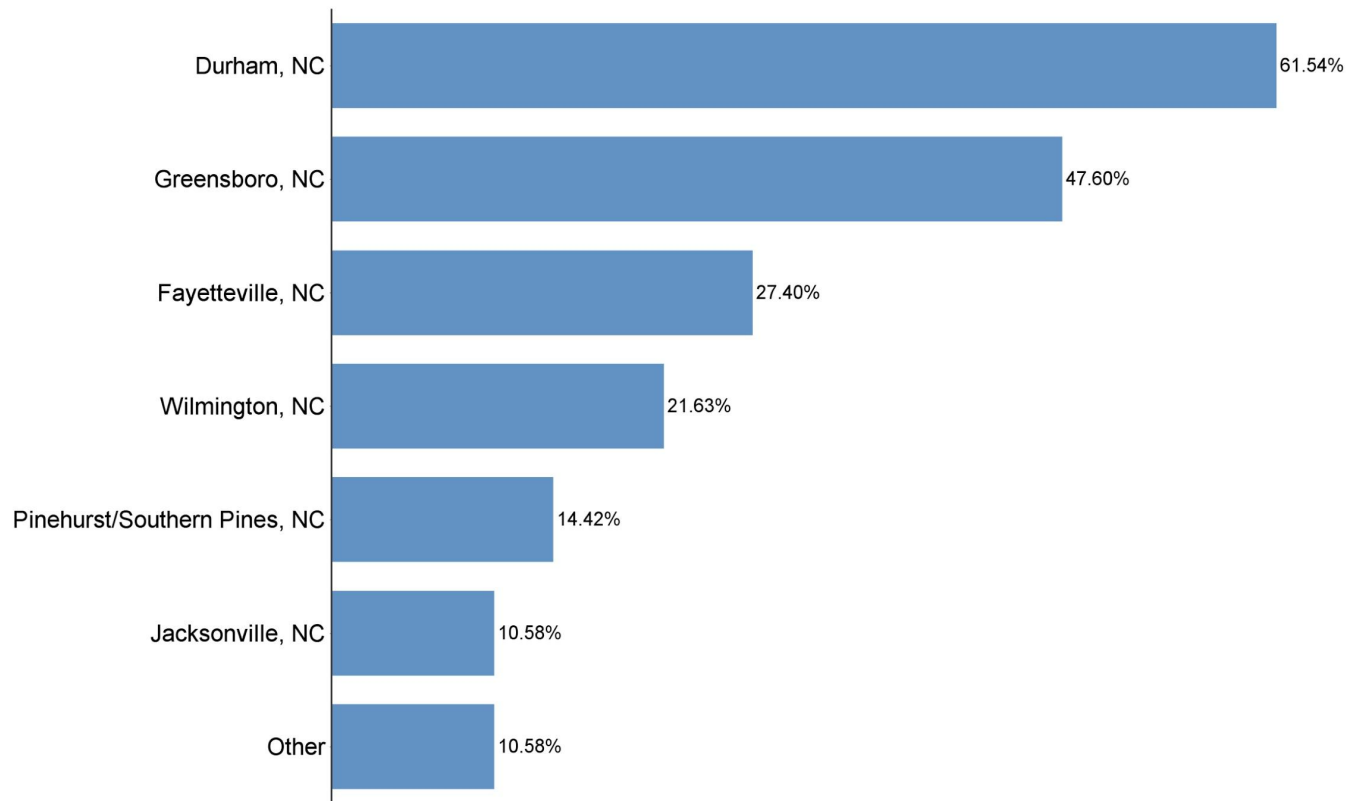


# CAP Study

CHARLOTTE & RALEIGH RESPONDENTS ONLY

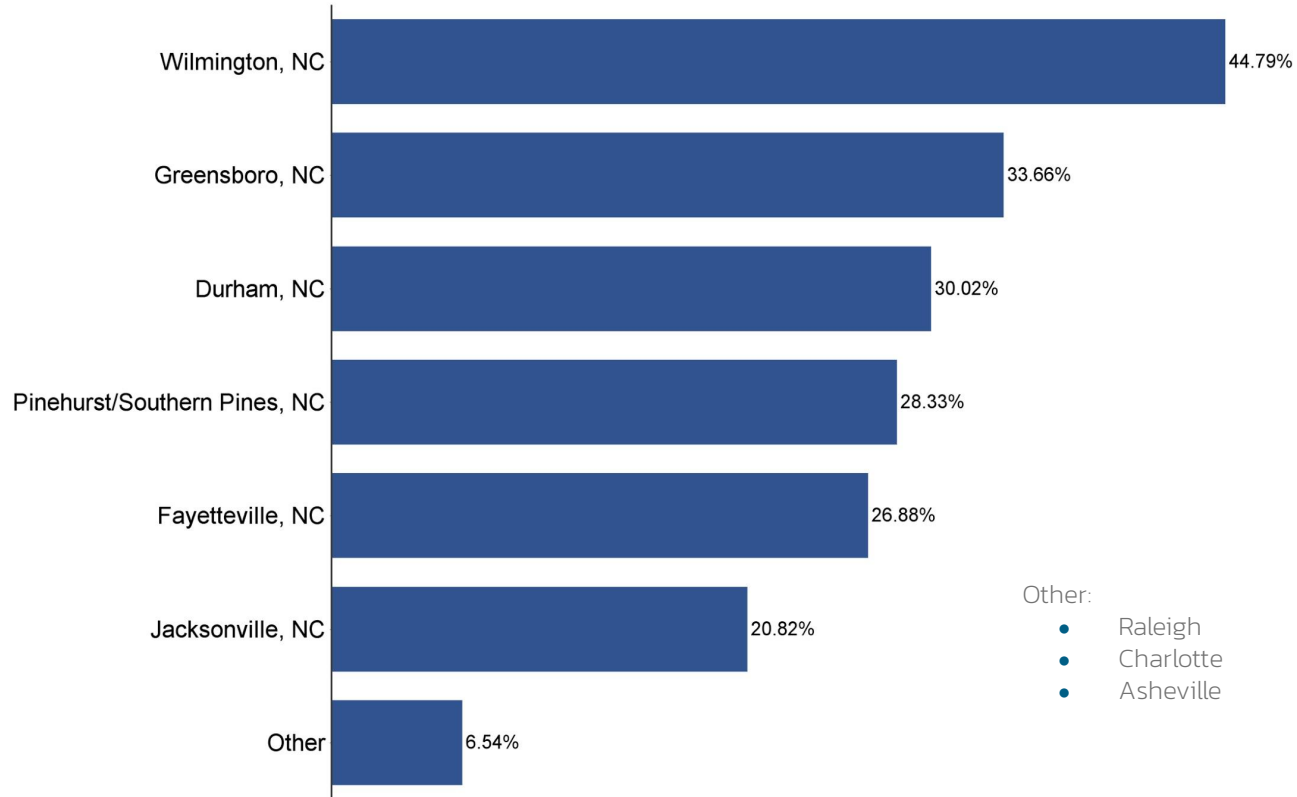
In which of the following cities would you expect to find **highly trained talent with advanced skills**?

*Choose two answers.*



# CAP Study

Which of the following cities do you most associate with **strength of character and generosity of spirit**?  
*Choose two answers.*



Other:

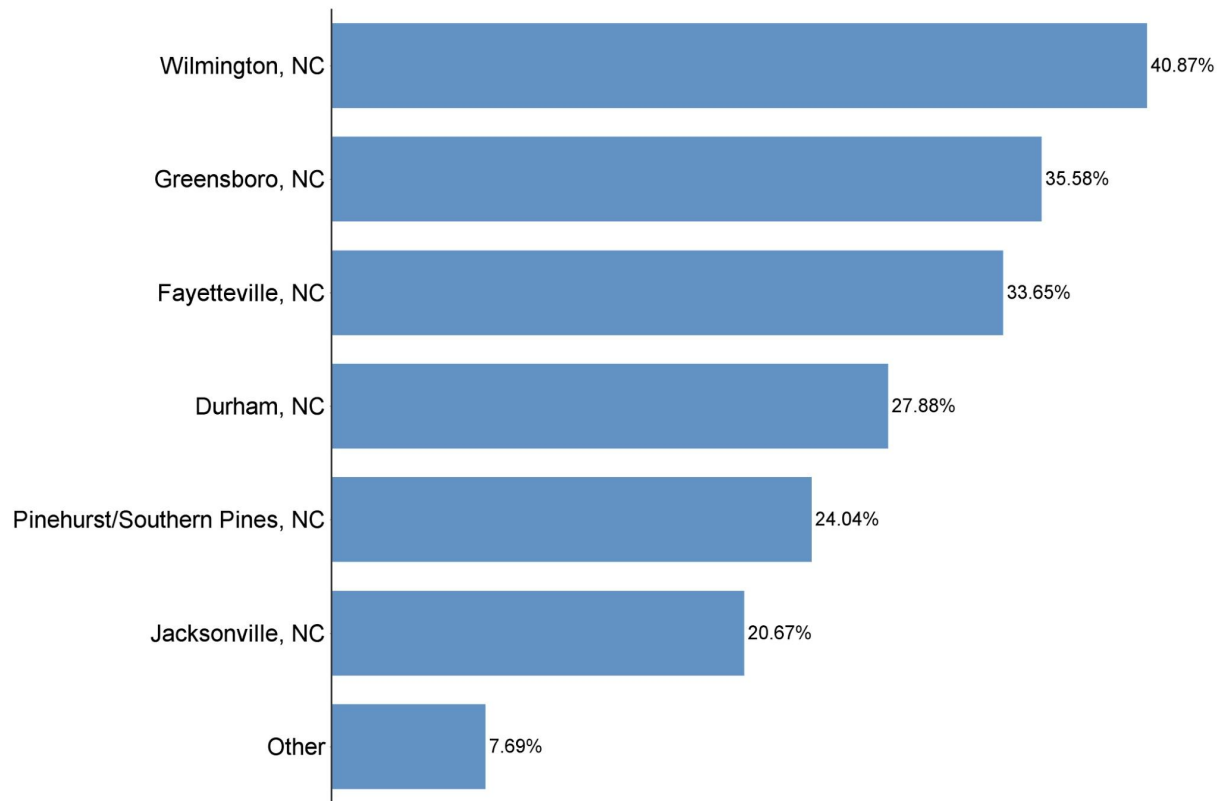
- Raleigh
- Charlotte
- Asheville

# CAP Study

CHARLOTTE & RALEIGH RESPONDENTS ONLY

Which of the following cities do you most associate with **strength of character and generosity of spirit?**

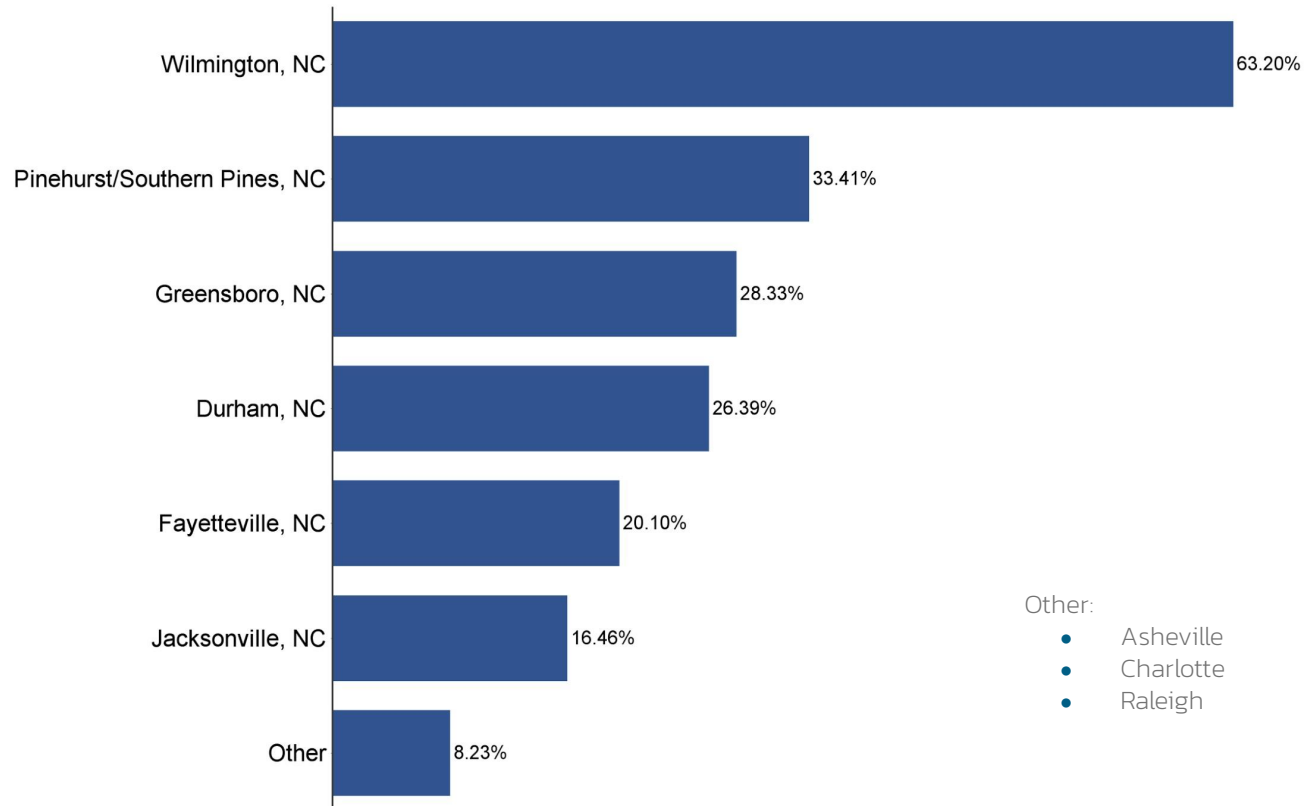
*Choose two answers.*



# CAP Study

Which of the following cities are you **most interested in visiting**?

*Choose two answers.*



Other:

- Asheville
- Charlotte
- Raleigh

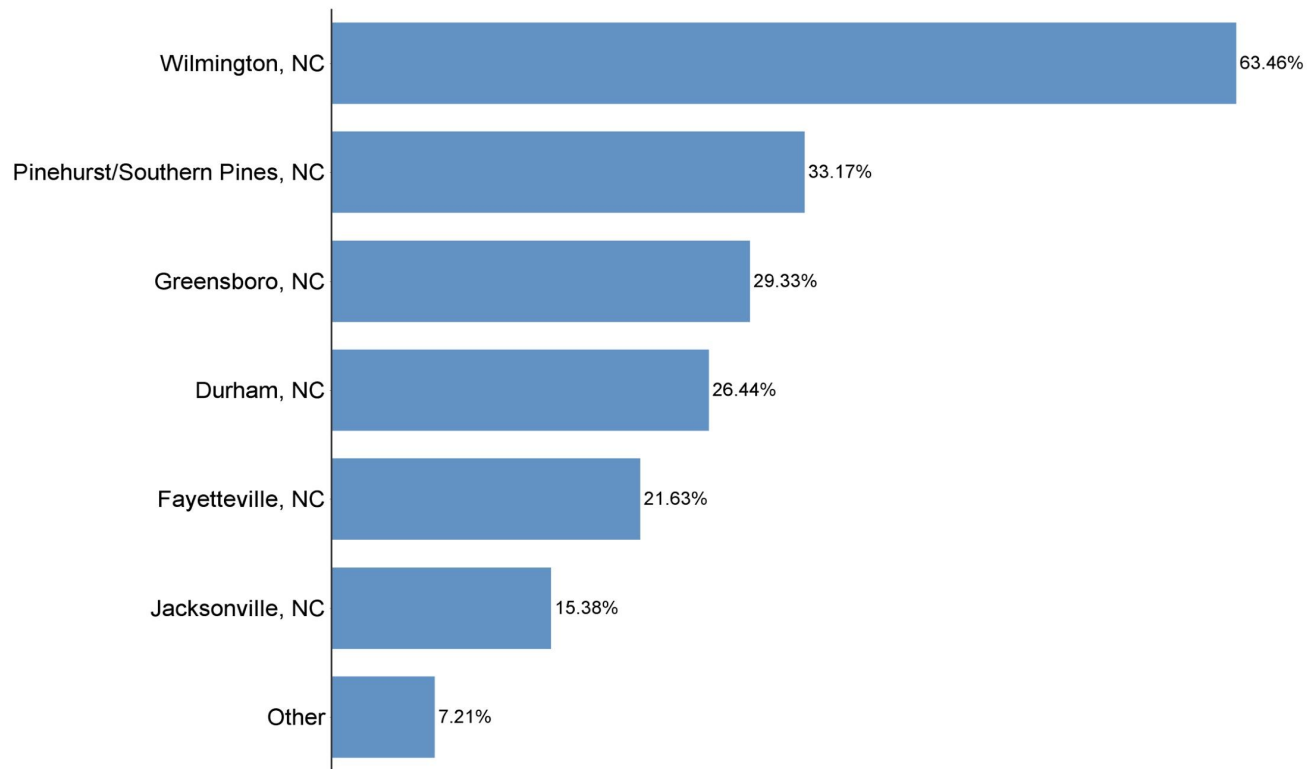


# CAP Study

CHARLOTTE & RALEIGH RESPONDENTS ONLY

Which of the following cities are you **most** interested in visiting?

*Choose two answers.*



# CAP Study

What is the primary reason you would visit the following cities?

## Durham, NC

- Shopping
- Dine out
- Baseball
- Visit Duke

## Fayetteville, NC

- Shopping
- Military facilities
- Visit family
- History

## Greensboro, NC

- Shopping
- Visit family/friends
- Visit university
- Go to a concert

## Jacksonville, NC

- Go to beach
- Military facilities
- Visit family
- History

## Pinehurst/Southern Pines, NC

- Golf
- Visit family
- Shopping
- Scenery

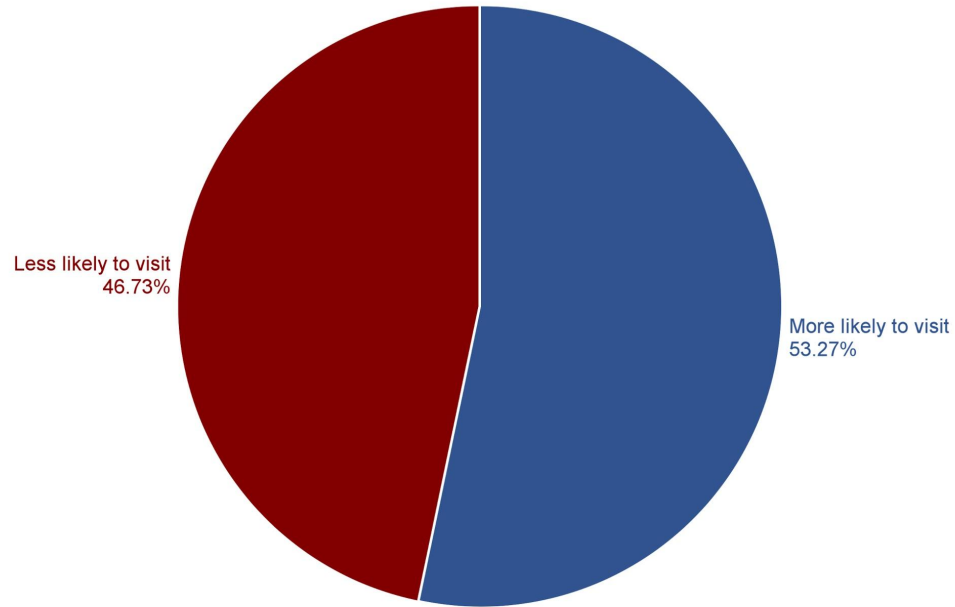
## Wilmington, NC

- Beach vacation
- Dine out
- Work/Business
- History

# CAP Study

## MILITARY TOWNS

If a town is known as a military town, does that make you more or less likely to want to visit it?



Other than a military base and soldiers, what do you associate with military towns?

- Military history
- Diversity
- Restaurants and bars
- Patriotism and pride
- Nightlife
- Military weapons and vehicles
- Crime
- Crowded
- Families
- Shopping

# CAP Study

Where is Fort Bragg Military Base?

*Name the closest city, county or part of North Carolina.*

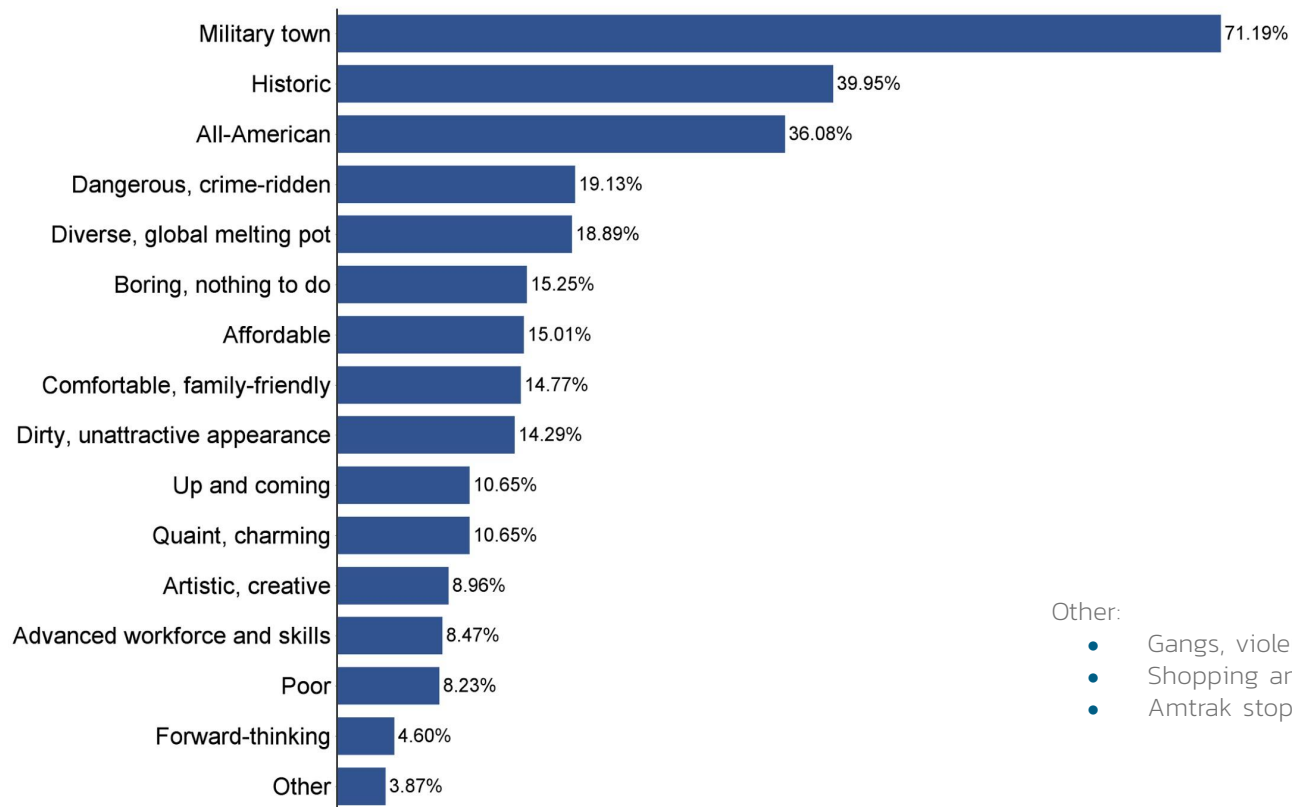
1. Fayetteville 65%
2. Cumberland County 6%
3. Jacksonville 5%

# Perceptions

# CAP Study

Which phrase or adjective best describes **Fayetteville, NC**?

*Choose three answers.*



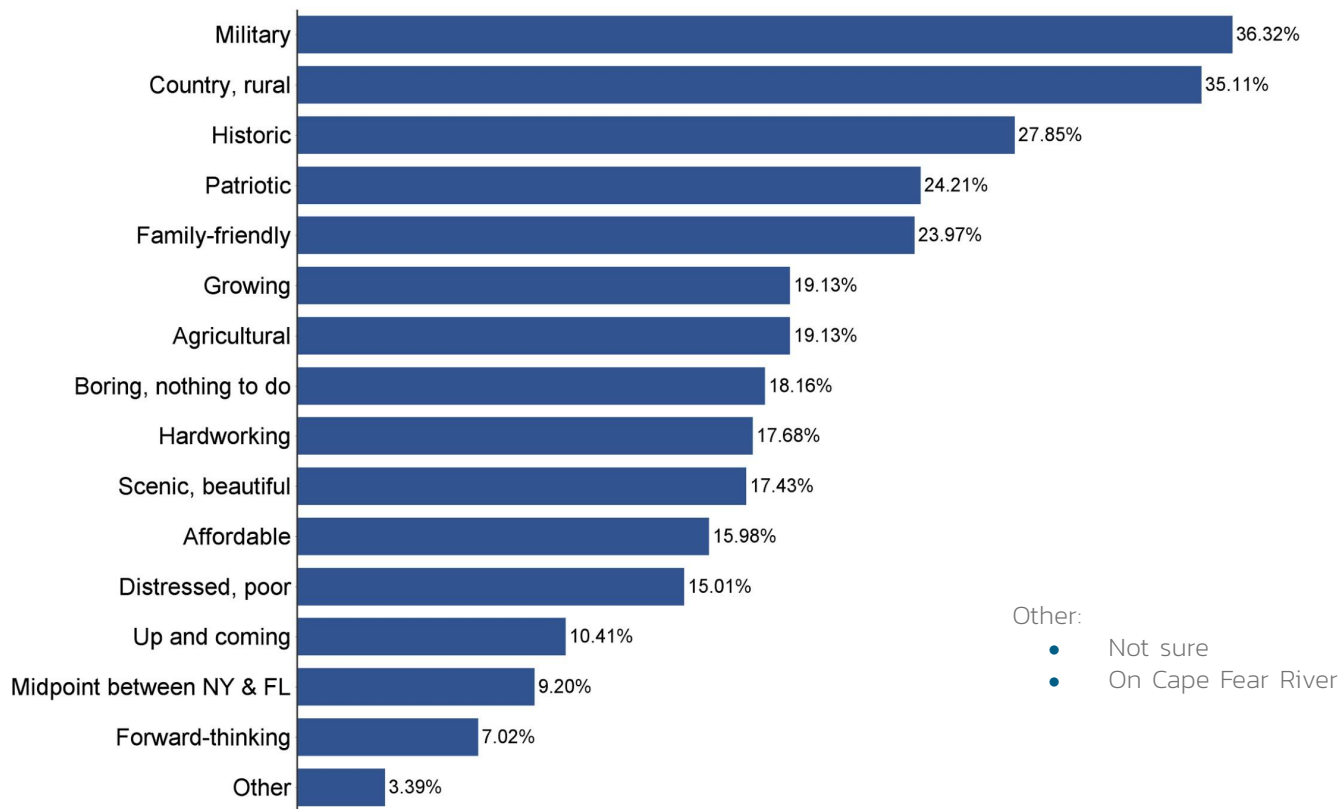
Other:

- Gangs, violence
- Shopping and dining options
- Amtrak stop

# CAP Study

Which phrase or adjective best describes **Cumberland County, NC?**

*Choose three answers.*



# CAP Study

Distinction in North Carolina

In which two ways is the City of Fayetteville distinct in North Carolina?

- Military presence
- Historic
- Diversity (people and cultures)
- Crime

In which two ways is Cumberland County distinct in North Carolina?

- Rural
- Military presence
- Historic
- Friendly

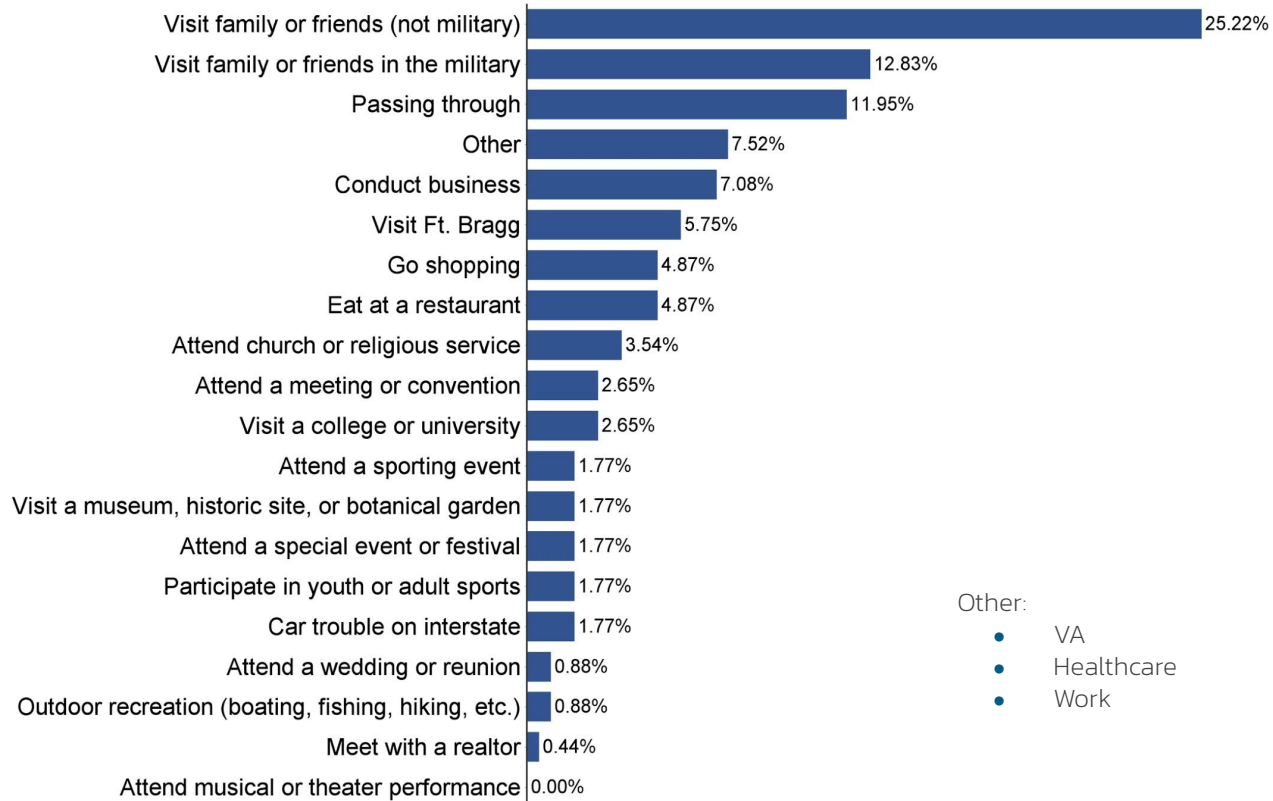


# Visitors

25

# CAP Study

What was the primary purpose or main reason you visited **Fayetteville** or **Cumberland County** on your most recent visit?



# CAP Study

What was your perception of Fayetteville and Cumberland County **before you visited?**

## Traditional Military Town

- *Military city with a lot of diversity and great food*
- *That the military really was the the central theme of the city*
- *Suspected it was crowded because of the military*
- *Just knew that Fort Bragg was there*

## Some Incidence of Crime

- *High crime in certain areas. Hay Street is fine, but don't turn down the wrong street.*
- *Dirty and crime ridden with little to do*

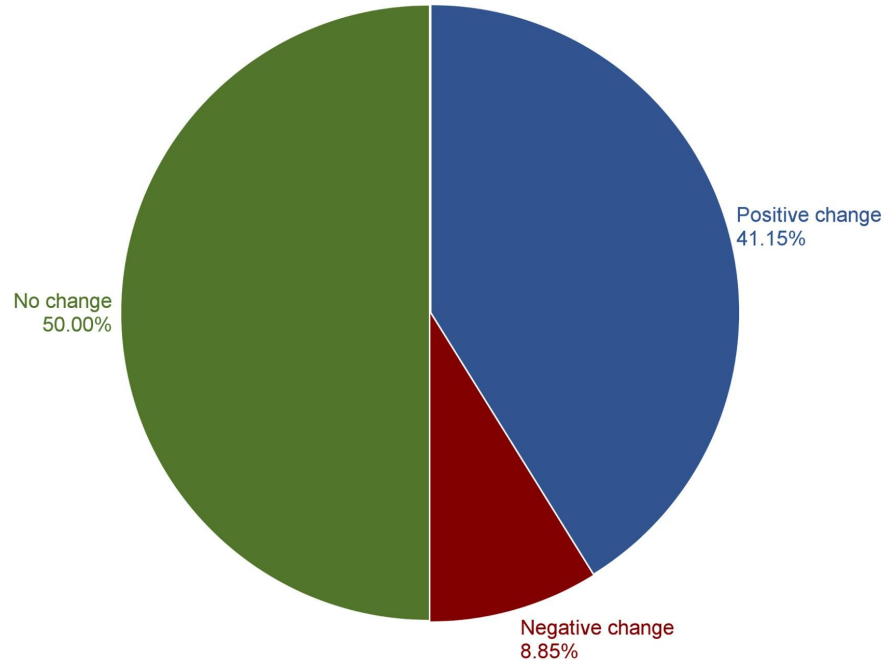
## Nice People, Nice City

- *Much nicer than it was 30 years ago*
- *Positive, well rounded, strong community*
- *Nice, easy city to visit for something new*
- *Friendly and easy going*

# CAP Study

## PERCEPTION STUDY

Did your perception of Fayetteville and Cumberland County change once you visited?



What changed your perception?

- *Impressed with what it had to offer*
- *More urban than I thought*
- *There was much pretty scenery in the county*
- *It has a nice university and is more progressive*
- *There was not quite as much traffic as I thought*
- *Friendly atmosphere and good feeling of safety*
- *The area seemed run down*

# CAP Study

## LASTING IMPRESSIONS

In your opinion, what aspect of Fayetteville and Cumberland County leaves the greatest positive impression on visitors and newcomers?

- *Military today and its history*
- *One of the biggest army bases in the country*
- *The people and their hospitality and friendliness*
- *Patriotism of the community*
- *Simple living, hometown feel, and a sense of community*
- *Cleanliness, friendliness of the people, and that the business community is growing*
- *The downtown area has been renewed*

In your opinion, what aspect of Fayetteville and Cumberland County leaves the greatest negative impression on visitors and newcomers?

- *The crime rate and the uncleanliness*
- *Traffic was pretty bad sometimes*
- *Urban areas, some areas seem run down.*
- *A little run down and dirty but cleaning up*
- *Fort Bragg, how big it is and how much army personnel there is at all times*
- *A lot of businesses inflate prices because of soldiers*
- *Empty commercial buildings and poor entryways*

# CAP Study

What **surprised** you about Fayetteville and Cumberland County?

## Diverse Cultures

- *The amount of other cultures I saw*
- *The cultural diversity of the people*
- *The many festivals that the city sponsors to show the local diversity*

## Traffic Patterns

- *It had traffic like a very major city*
- *How confusing the drive was with all the construction*
- *Ease of getting around town*

## Geography

- *The superb views of nature*
- *It is growing and it is so spread out*
- *The overall size of the military base*

# CAP Study

How is the rest of Cumberland County different from Fayetteville?

- *More country feel on the outskirts*
- *Quieter with more farming*
- *Not as urban or run down*
- *You can see the true Sandhill topography once you leave the city*
- *More scenic than the city*
- *Not as congested*
- *More sparse and less populated*
- *It is more rural than the city and has lots of pretty land*
- *It is a very agricultural area. There are huge farms, tobacco, cotton, soy beans, corn that go on for miles and miles.*
- *Fayetteville seems to be more of a destination, more booming and bustling than the rest.*
- *Fayetteville is more urban than rural and has more available*

## INTERNAL

Military town

"Fayettenam"

Dangerous, crime-ridden

Boring, nothing to do

Rural, country

Dirty, unattractive appearance

Dogwood Festival

International Folk Festival

What **Fayetteville** and  
**Cumberland County**

<< Think **OUTSIDERS** say  
vs.  
What **OUTSIDERS** do say >>

## EXTERNAL

Military town

Historic

All-American

Rural, agriculture

Dangerous, crime-ridden

Higher education institutions<sup>92</sup>

Historic

Small town feel

Family-friendly

Southern charm and hospitality

Improved downtown

Cultural diversity

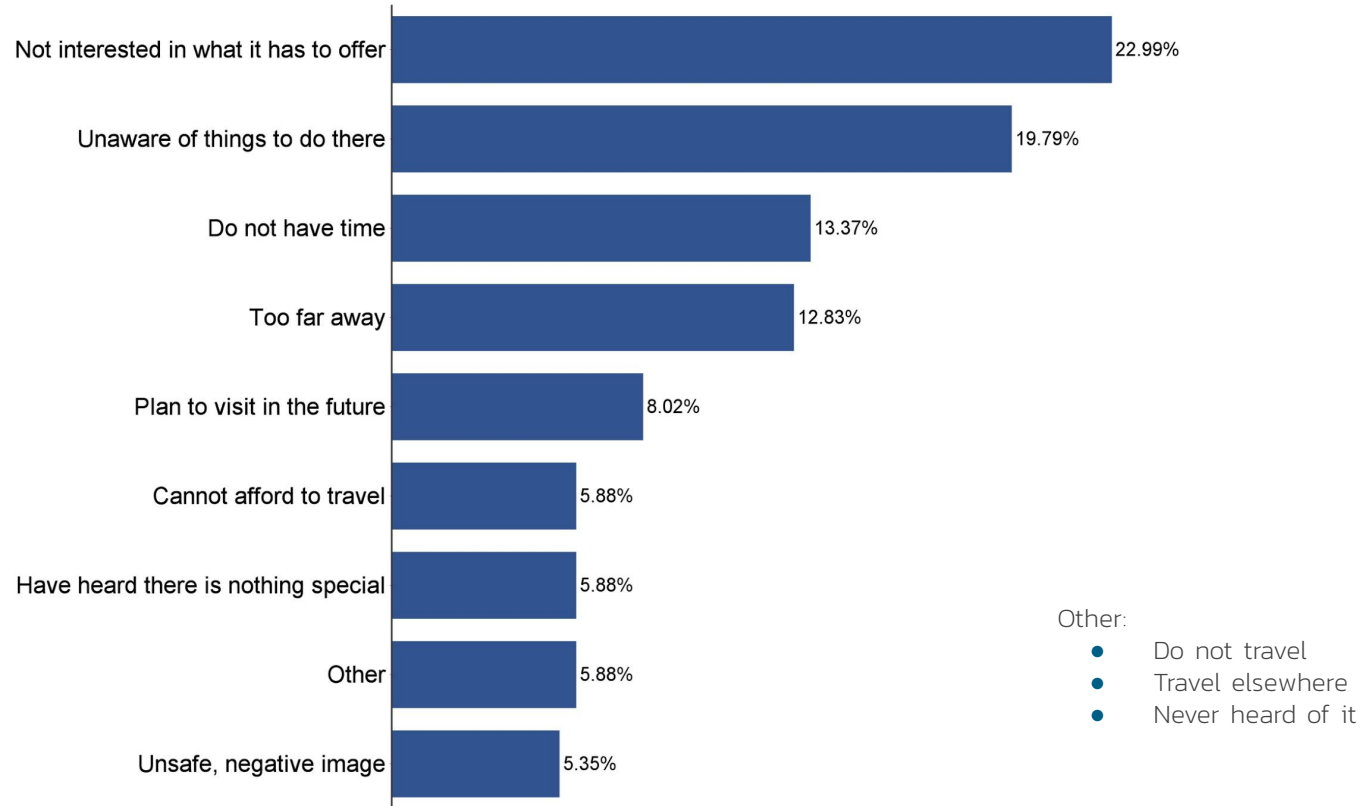


# Non-Visitors

93

# CAP Study

## Why have you not visited Fayetteville or Cumberland County?

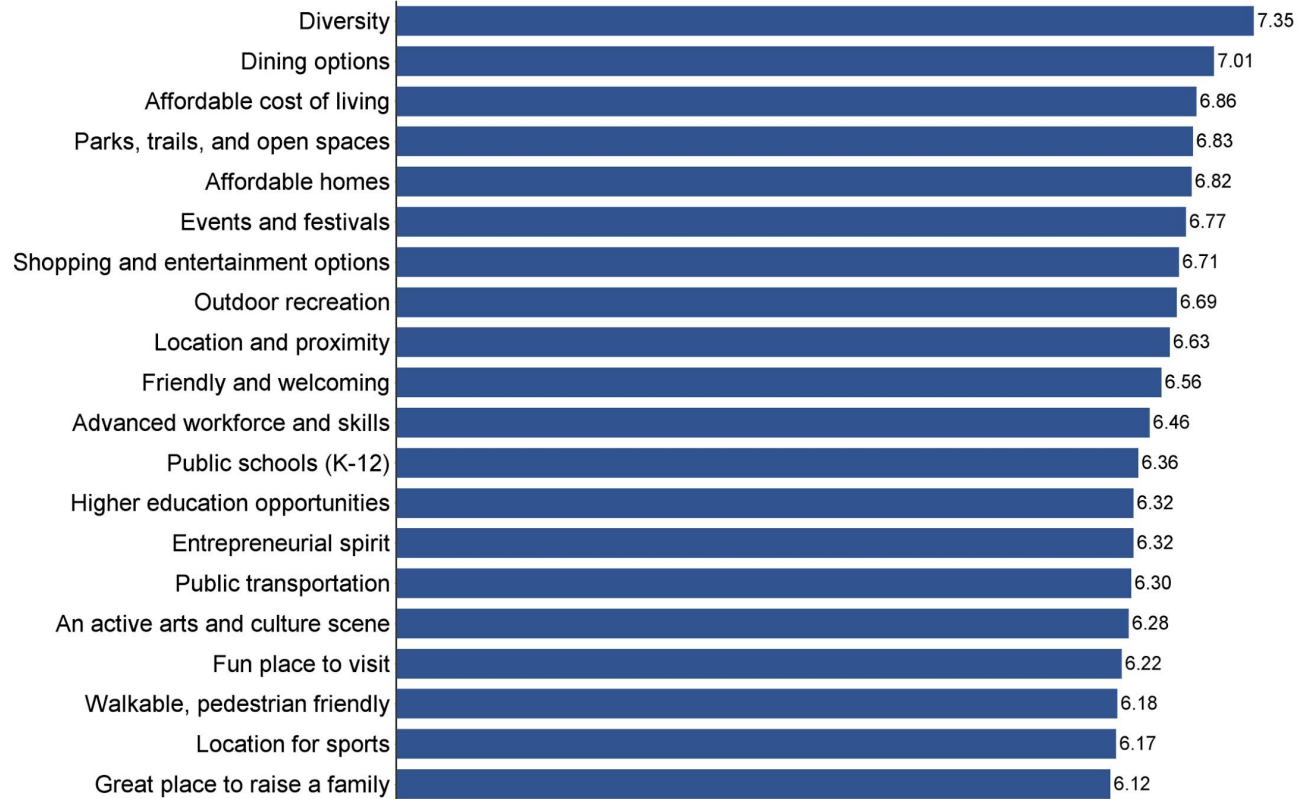


# Perceptions

95

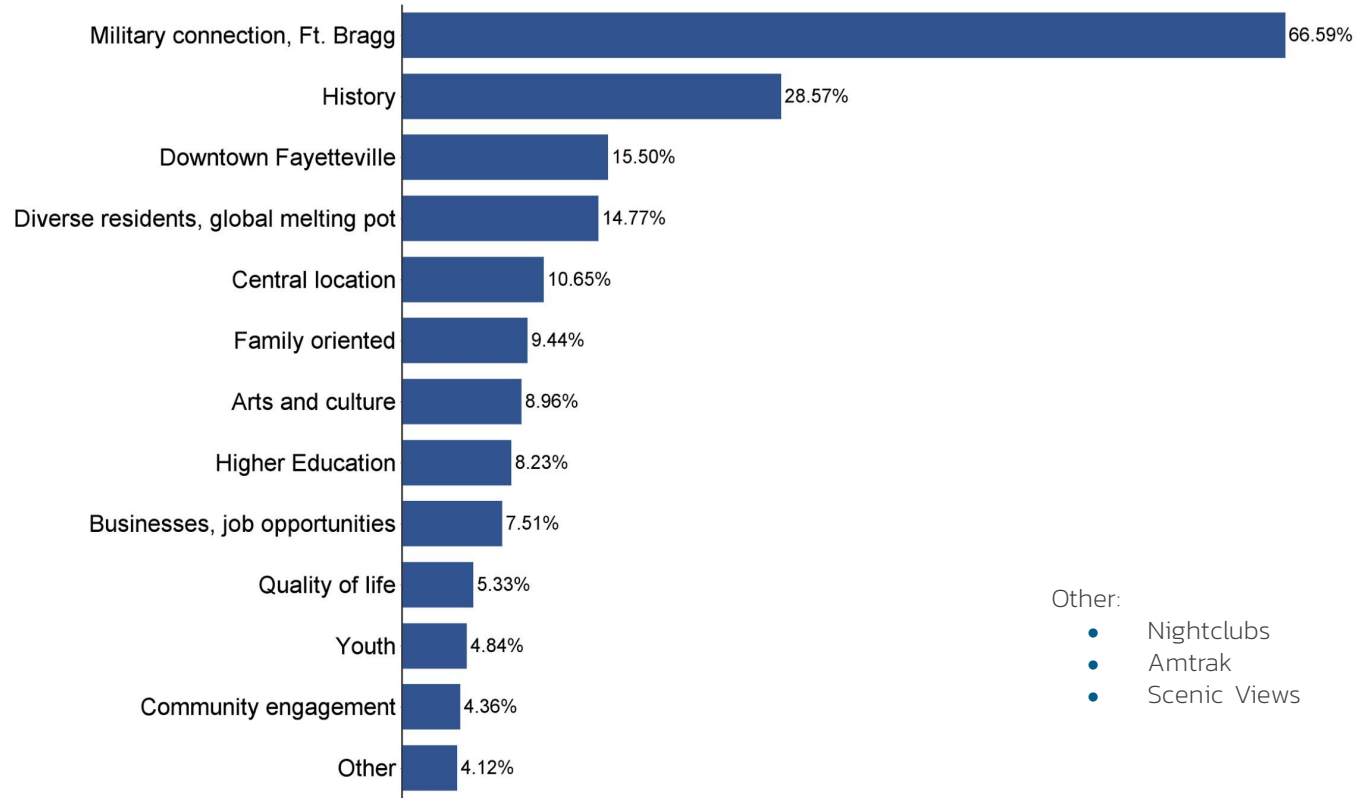
# CAP Study

Based on your perceptions or experience, please rate the following Fayetteville and Cumberland County attributes on a scale of 1–10, where 1 is “Poor” and 10 is “Excellent”.



# CAP Study

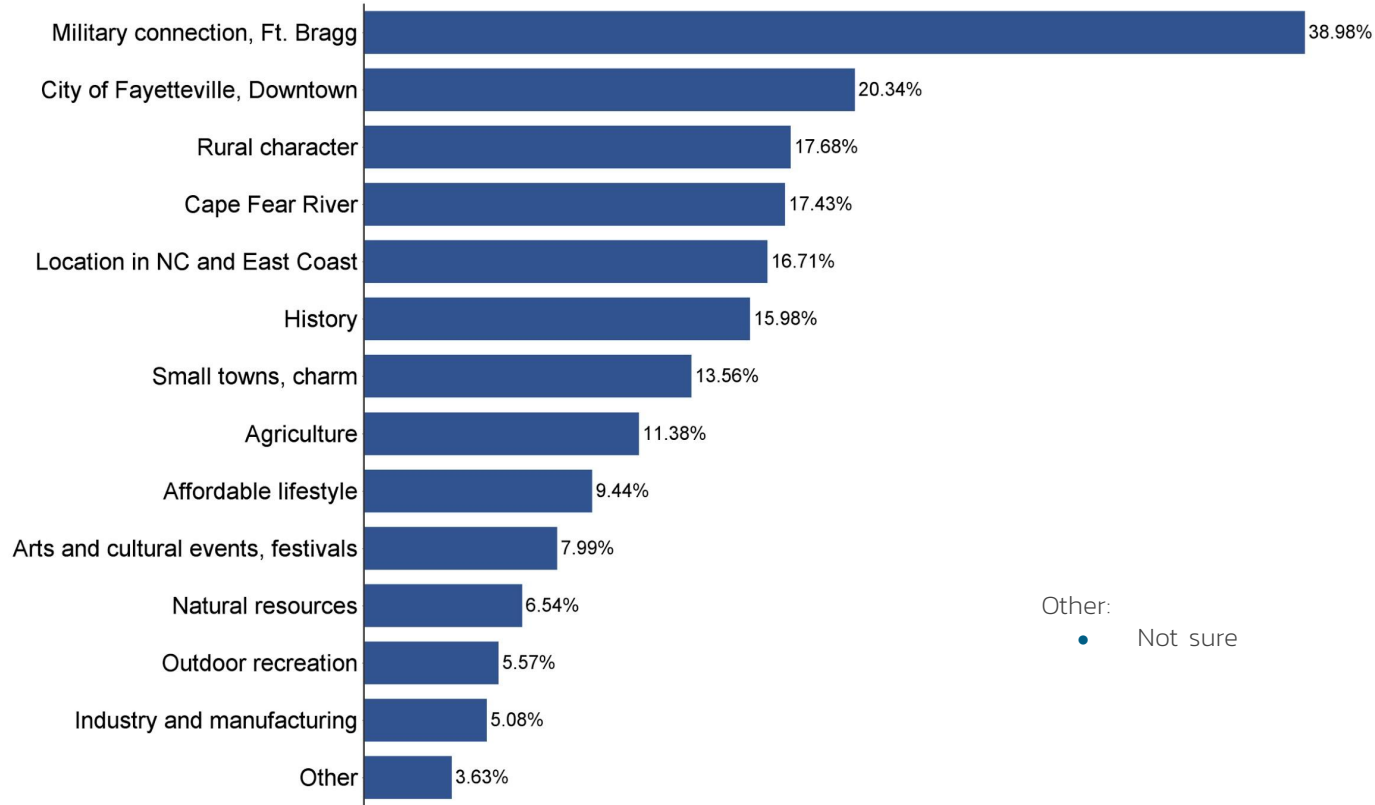
What is most important to Fayetteville's identity? (Without \_\_\_\_\_, Fayetteville would lose its essence.)  
*Choose two answers.*



# CAP Study

What is most important to Cumberland County's identity? (Without \_\_\_\_\_, Cumberland County would lose its essence.)

*Choose two answers.*



# CAP Study

What has the **greatest potential to change external perceptions** of Fayetteville and Cumberland County?

- *More advertisement to let others know what is there*
- *The diversity within the county has potential to shock the rest of the State and attract new immigrants*
- *The troops and the long Cape Fear River*
- *The new sports team that is bringing a new crowd outside for more Fayetteville fun*
- *Growth and lowered crime rate*
- *Better media coverage of the area*
- *Make more opportunities available outside of the military construct*
- *Forgetting the Vietnam war area negative perception*
- *Marketing and advertising to show it is more than just a military town*
- *I can see no real change. The connection with Bragg is just too well welded.*
- *Educational opportunities and renovation of rundown areas*
- *Right now, Fayetteville feels like a company town. It would change perceptions of Fayetteville if it cultivated a reputation for a connection to something independent of the military.*

# Influencer Survey

20 EXTERNAL state, governmental and peer city leaders interviewed



# Influencer Perception Study

## Assets

Historical assets  
Central location along I-95  
Military/Ft. Bragg  
Airborne Division  
DOT/infrastructure  
Ready, trained workforce  
Downtown – walkable/charming  
Diversity of people due to military  
Airborne/history museums  
Patriotism  
Visitor pipeline from military family  
Veteran-owned businesses  
Baseball field

## Challenges

Lack of offerings compared to do-everything destinations (golf, beach)  
Nearby upscale residential communities  
Legacy of Fayetteville  
Lack of unified political leadership  
Non-military civilian population is not diverse  
Viewed as lower demographic  
Military first, business second

## Missing

More niche attractions  
ED focused development – distribution centers, logistics  
Young workforce  
Local brand ambassadors  
Employment opportunities for local college graduates  
Destination not well understood  
Nicer hotels

## EXTERNAL PERCEPTIONS

## Opportunities

Arts/Cultural offerings  
5th largest retail area in state  
Downtown renaissance  
Proximity/access to business with the military  
Continual labor supply with military retirees/trailing spouses  
Cybersecurity programs/jobs due to advanced military workers

# Site Visits

Discussions with 165+ LOCAL individuals

# Perspectives

## QUOTES

- *"We're ready for you."*
- *"If you want it, baby we've got it."*
- *"We have to constantly sell Fayetteville."*
- *"Emerging things are happening in Fayetteville."*
- *"Great things are taken for granted in Fayetteville."*
- *"We're the working man of the Carolinas. We don't need to compete with Charlotte and Raleigh, we just need to be the best Fayetteville we can be."*
- *"I don't think we're done in Fayetteville."*
- *"If Fayetteville is slow, Cumberland County is even slower."*
- *"If I didn't live here would I visit? Probably not."*
- *"We don't believe that we deserve better so we perpetuate a level of negativity."*

# Perspectives

## QUOTES

- *"We tend to be fragmented and not tackle big things."*
- *"We're falling behind."*
- ***"Work ethic has always been a fabric of our community."***
- *"Fayetteville should embrace blue-collar work ethic instead of being something we're not."*
- *"People here do what they say. That's a real rarity."*
- ***"If we did a better job unifying people, we'd retain them."***
- *"We're moving, but not fast enough."*
- ***"We're a town influenced by military, but not a military town."***
- *"We are diverse, but not unified."*
- ***"Fort Bragg is where you go if you want to challenge yourself. It is always in the spotlight. In the Army, it's a badge of honor assignment."***

# Perspectives

## QUOTES

- *"Fayetteville does logistics really well. We're good at moving one thing to another."*
- *"Why wouldn't someone want to do business with the federal government here?!"*
- *"Bragg is focused on readiness and rapid deployment. Whether it's troops or containers, premier power projection is at the heart."*
- *"We depend on Ft. Bragg more than we should."*
- *"There's no reason to visit Fayetteville except ASOM."*
- *"The transient nature here provides opportunity."*
- *"No one is a minority here. Everyone understands coming in and knowing no one. We live as one, neighbor to neighbor."*
- *"We're the Epcot of the Carolinas."*
- *"All the raw ingredients are here, we just don't know the recipe."*

# Perspectives

## QUOTES

- *"We don't want our brand to be military-driven. We are proud of our association, but it's also a job for us. So when we're off duty and out of uniform, just like anyone, we like to let our work go."*
- *"We're a melting pot, but we're not united day to day. We jump out of airplanes together then go separate ways at night."*
- *"FayetteNOW"*
- *"The community has a culture of service and sacrifice – it's in our history, our churches, our volunteerism – even taking care of each other after a storm."*
- *"It's diverse here, but not divisive or fractured."*
- *"Nobody talks to each other – we are siloed. The FCEDC is starting to fix that."*
- *"The diversity is here but not lived day-to-day. The international population is focused on work and family – we haven't stepped up."*
- *"We (the community) are Ft. Bragg's family. We take care of the families while the soldier is deployed."*

# Perspectives

## QUOTES

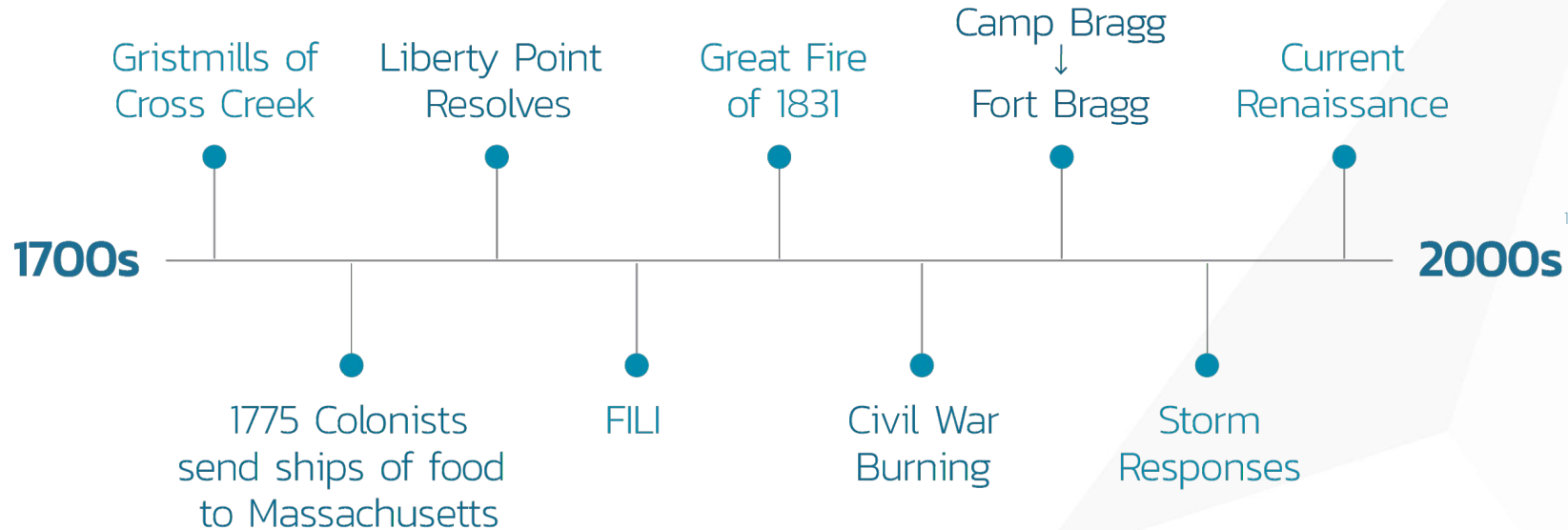
- *"We're a hamburger and hotdog town, not a ribeye town."*
- *"We don't relate as much to the Uncle Sam and the History, Heroes and Hometown Feeling anymore. We get it but it doesn't feel authentic to us."*
- *"The two scariest moments in a soldier's career are combat and transition (to the workforce). We need to be the community that helps them with both."*
- *"There is an urban and rural interplay, a contrast, between our city and county. The river is the dividing line."*
- *"We're a melting pot, but we're not united day to day. We jump out of airplanes together during the day, then go separate ways at night."*
- *"It's the best community in the world to choke on a piece of meat at a restaurant - you're always surrounded by caring people and highly trained military people who will save you."*

# Community History & Accolades



# A History of Resolve, Service & Action

HISTORY



# A History of Resolve, Service & Action

HISTORY

*"Let us not forget that the patriots of the Cape Fear **began early, fought long and never stopped** until the last bugle for the battle was sounded and the last of the enemies of freedom driven out."*

*– Historian John Oates, The Story of Fayetteville*

*In 1783, regarding the possibility of naming Fayetteville the state capital, a journalist wrote:*

*"(no where) observed **so much public spirit**...(infrastructure) improvements carried about by private subscriptions (donations)."*

# Community Distinctions: A Culture of Caring & Engaging

HISTORY

- **All America City:** “recognizes cities that leverage **civic engagement, inclusiveness and innovation** to successfully address local issues.”
- **Highest Generosity Index** (4.71) among major NC cities
- **600+ religious congregations**, Fayetteville Urban Ministries, Dream Center, etc.
- **Courageous, passionate African American Leadership:** Hammond, Leary, Evans and Smith
- One of most **robust, engaged service club cultures** in the US (Kiwanis, Rotary, Elks, Lions, etc.)
- County **Department of Social Services** most resourceful, capable in NC
- **Most Innovative City:** data use and strategic planning, racial equity in decision making, and citizen engagement.

# The Impact & Influence of Fort Bragg

The presence of Fort Bragg contributes to the Fayetteville & Cumberland County story on many levels. While the general aspiration is to brand “beyond Bragg,” the post’s influence is essential:

**Mission:** Fort Bragg provides sustainable services and infrastructure in support of readiness.

**Economic:** \$9.8 Billion annual local impact; 50,000–55,000 assigned personnel and growing with a total of 274,977 in supported population.

**Talent:** **7,000 military retirees leave Bragg each year.** Some 75% are heading into a “Career Track,” prepared for employment in logistics, mechanical, cybersecurity, public affairs, executive management, strategic planning, IT/network integration, engineering, international relations and more. Suggestive of its leadership development, only The Pentagon is home to more Generals than Fort Bragg.

**Values & Mindset:** as the Army’s elite training ground and command, Bragg is “the Army’s premier power projection platform.” With the ability to deploy anywhere in the world within 18 hours, Bragg personnel are trained around the concept of readiness. Army Values include: ***Loyalty, Duty, Respect, Selfless Service, Honor, Integrity and Personal Courage***. Many call Fort Bragg “America’s 911.” Mantra: ***All The Way***.

# Two Forces Will Shape The Region's Image

## **"Internal" Marketers**

- County
- City
- Towns
- Airport
- Schools
- Arts Council
- Downtown
- Chamber/Business Community
- Crown
- Not-For Profit/  
Faith Community

## **External Marketers**

- CVB
- EDC
- Arts Council

**Both must put the brand to work**

# Internal Marketers

- **Problem:** Research indicates a low self-perception within the community
- **Opportunity:** Each internal marketer has a bold mission and outstanding work is being done; there is much to be proud of!
- The potential (and mandate) now is to **teach the community to love itself**
- External marketing efforts will fail if the talk on the street at home is not strong and full of conviction

# External Marketers

- CVB, EDC & Arts Council each at varying levels of marketing maturity
- **Opportunity:** distinct but related marketing tied to a unified brand DNA

# Arts & Culture: Punching Way Above Your Weight In NC

## Fayetteville-Cumberland County Arts Council One of Most Progressive in NC

- Fundraiser to afford a staff in 1973
- Moving downtown in 1987
- Assuming management of IFF, starting Dickens Holiday
- Public art installations, 4th Fridays
- Leading the state in per capita arts funding (bed tax)
- Most awarded theatre in NC; symphony, botanical gardens; now charged with promoting events and festivals
- Education, grant making, employment: **always advancing the mission**

**WE ARE THE ARTS**



# A Very High Functioning & Successful CVB

## The Cumberland County-Fayetteville Area CVB Is The Area's Largest Marketer

With the most significant annual budget of those entities that market to the external market, the CVB is the **largest active voice of current Fayetteville-Cumberland County external promotion (tourism)**. The bureau has been very successful and runs a compelling and professional program ("America's Hometown"). The interplay of the new community brand and the CVB brand will be crucial. Ideally, a shared evolution will uphold the goal of a unified message.

In particular, the bureau's **17 countywide heritage trails** (itineraries) provide a robust and enriching visitor experience. They include: *African American, Adventure, American Independence, Antiquing, Civil War, Fish & Game, Gaelic* <sup>117</sup> *Beginnings, Historic Architecture, Historic Markers, International Cuisine, Paths/Plank Roads, Patri-Arts & Gardens, Patriots Past & Present, Religious Freedom and Secondhand Treasure.*

The Bureau's and this research report confirm that the top reasons for visits include seeing family and friends or driving through (I-95 stop).

There are two points of consideration for the the CVB's outstanding program as the brand process unfolds:

- 1) The level of association with the military that the market (local and far away) holds is so extreme that the CVB can maximize opportunities by expanding beyond it. The question becomes, **how can the new brand provide an introduction to the visit experience that expands the tourism audience?**
- 2) Most interviewed in the community hope that branding can center less on military theming (albeit the visitor experience programming is undeniably military-related). **Leveraging, extension and re-interpretation is the opportunity.**

# Economic Development: High Performance Culture

## Fayetteville-Cumberland County Economic Development Corporation

- New levels of aggressiveness and professionalism
- Recent jobs and investment wins prove new energy is working
- Leveraging I-95 location, largest metro between Richmond & Savannah
- **Recruitment Focus:** Applied Advanced Technology, Logistics, Manufacturing (light blue collar), International (need to further leverage languages)
- **Key:** selling (and retaining) Bragg skills: cyber ops, technology, medical diagnostics, robotics, etc.
- Branding will be critical to next step of growth: a concise, consistent value proposition

## A Unified Front – Internally & Externally

- **Regional Community Brands Succeed** when there is cooperative buy-in and implementation
- It takes internal and external synergy to be successful
- **The Mandate:** your commitment of effort, energy and resources

## A Recent Success



*California.* WHERE BUSINESS IS BOUNDLESS.

# Competitive Positioning Review

# Competitor City Brands

FULL LIFE. FULL FORWARD.  
**FLORENCE**  
SOUTH CAROLINA



**Raleigh**



**DURHAM**  
*Where great things happen*



**Greenville**  
NORTH CAROLINA  
*Find yourself in good company®*

**Greenville**  
NORTH CAROLINA

122



# Competitor County Brands



Welcome  
TO HOKE COUNTY



Harnett  
COUNTY  
NORTH CAROLINA

123



# STRATEGY

## Insights



# STRATEGY

Authentic + Aspirational

# STRATEGY

“The essence of strategy is sacrifice”

David Ogilvy

# Our Focus Today

The job of the brand is to tell your most competitive story.



The job of the strategy is to determine what that story should be about.

# Insights

## WHAT WE LEARNED.

- **Invested & Expectant:** There is unquestionable energy, momentum and passion in Fayetteville and Cumberland County. The willingness of multiple partners to push for progress together says that the community's time is now. It is ready to go to the next level and applying action to do so.
- **Skewed Self Perception (That Needs Correcting!):** Within the community, Fort Bragg and the military is a dominant self-label. Further, the community believes outsiders have a negative view of the community. This may contribute to their reluctance to recommend the community as a place to live, do business or visit.
- **Lower Relative Familiarity Creates Neutral Outside Understanding:** People around North Carolina are familiar with Fayetteville at average levels for its size (Wilmington over-indexes). Outsiders also tie the community closely to the military and Fort Bragg, however, they tend to have more vague perceptions of the community – not necessarily negative.
- **Transience & Ethnic Diversity Drive A Welcoming, Accepting Culture:** While sometimes described as a negative, for most the transient military population drives a culture of acceptance (“we’re all newcomers, we’re all in this together, we all look out for each other”). In addition, the community’s diverse (“melting pot”) culture seems to have reduced stigma around differences, furthering a character of acceptance and inclusion. This is the context within which the diversity story should be told as statistically the community is not extremely diverse and the diversity is not a highly accessible feature of the community.

# Insights

## WHAT WE LEARNED.

- **An Extraordinary Talent Source (and Ethos) Is Here for Employers:** 7,000 military retirees leave Bragg each year, trained in logistics, mechanical, cybersecurity, public affairs, executive management, strategic planning, IT/network integration, engineering, international relations and more. With the ability to deploy anywhere in the world within 18 hours, Bragg personnel are trained around the concept of readiness. They carry with them the Army values of *Loyalty, Duty, Respect, Selfless Service, Honor, Integrity and Personal Courage*.
- **Generosity of Spirit & A Service Mindset:** around the state (four cities surveyed), only 27% of people view Fayetteville as having a strength of character and a generosity of spirit. Inside the community, the story and the facts are different. The community leads the state Generosity Index ratings (2014), has a large faith community (600+ congregations) and individuals cite taking care of each other and a neighborly, helping attitude.
- **Greatest Strengths Are Unknown, The Stage is Set For Surprise:** arts and culture, international culture and population, ethnic diversity, generosity of spirit, interesting history and highly trained talent all rank mid-to-low vs. other North Carolina communities. Conversely, the military association is extreme.
- **Area History & Fort Bragg Have Inspired A Culture of Readiness & Action:** From pre-revolutionary settlers, to FILI, the town burnings, floods and the Civil War, Fayetteville and Cumberland County citizens have demonstrated resilience, fortitude and readiness. Fort Bragg's mission literally *is* readiness and its professionals are trained for that goal alone. As these personnel influence the community and live, work and retire in the community, they inherently shape a culture of readiness and action (similar to the generosity of spirit).

# Insights

## BUT WHAT MAKES US DISTINCT?

*"The community has a culture of service and sacrifice – it's in our history, our churches, our volunteerism – even taking care of each other after a storm."*

*"It's the best community in the world to choke on a piece of meat at a restaurant – you're always surrounded by caring people and highly trained military people who will save you."*

*"We've got one of the largest Kiwanis Clubs in America and a huge faith community – this place is about service."*

# Insights

## BUT WHAT MAKES US DISTINCT?

*"No one is a minority here. Everyone understands coming in and knowing no one. We live as one, neighbor to neighbor."*

*"We're the working man city of the Carolinas. We don't need to compete with Charlotte and Raleigh, we just need to be the best Fayetteville we can be."*

131

*"People here do what they say. That's a real rarity."*

*"Work ethic has always been a fabric of our community."*

# Insights

## BUT WHAT MAKES US DISTINCT?

*"All the raw ingredients are here, we just don't know the recipe."*

*"There is an emphasis on service to the customer and giving them everything they need to put on events or have a good time."*

*"(I want us to be) a place with a rich history, but also a willingness to try new things. A place that reinvents itself every few years. Always new, always changing."*

*"We're ready for you."*



# STRATEGY

## Platform

# Fayetteville & Cumberland County DNA Platform Statement

Target Audience: *To whom Fayetteville & Cumberland County has the most appeal*

Frame of Reference: *Geographic context of Fayetteville and Cumberland County*

Point-of-Difference: *What makes Fayetteville & Cumberland County special*

Benefit: *Why it should matter to the consumer*

# Fayetteville & Cumberland County DNA Platform Statement

Target Audience: *For those interested in a southern location with a global perspective and new energy*

Frame of Reference: *Fayetteville and Cumberland County, at the heart of the Carolinas and home to the world's largest U.S. military installation*

Point-of-Difference: *is where America's most highly trained professionals and most devoted neighbors always go further for you,*

Benefit: *encouraging, enabling and advancing your goals and dreams.*

# Fayetteville & Cumberland County DNA Pillars



# How Fayetteville & Cumberland County Always Go Further

**HUMAN Level** (Community/Social Service/Religious): *welcome, accept, befriend, assist and serve*

**RESIDENT Level** (Services/Arts & Culture/Schools): *provide, protect, educate, entertain, inspire and enrich*

**GROWTH Level** (Economic Development): *invest, support, innovate, partner and advance*

**VISITOR Level** (Tourism/Downtown): *intrigue, inform, anticipate, accommodate, excite and delight*

**MILITARY Level** (Ft. Bragg): *prepare, mobilize (globally), engage and influence* (conflict, cultural, disaster)

**Target Audience:** *For those interested in a southern location with a global perspective and new energy*

- **Southern Location:** F-CC's mid-size, lower levels of national awareness and budget suggest that ED, CVB and residential targeting should be among those already considering the southeastern U.S. region. The goal is to make Fayetteville a distinctive and desirable southern choice.
- **Global Perspective:** F-CC's opening is to appeal, albeit not exclusively, to those who are active participants in the global economy and may value language skills, international relations/commerce capability and military or defense contractor linkages.
- **New Energy:** Most of all, F-CC should seek targets who value its two signature levels of "new energy" – first, the level of investment, momentum and drive it now seeks to convert to success and, second, the continuously replenished (perpetual) pipeline of new human energy and talent made possible by its transient military population.

Frame of Reference: ***Fayetteville and Cumberland County, at the heart of the Carolinas and home to the world's largest U.S. military installation***

- **Heart of the Carolinas:** F-CC is literally in the center of two of the most prosperous and growing states in the U.S., the Carolinas. In fact, both North and South Carolina are among the Top 10 fastest growing states. Add to that F-CC's location on I-95, which Charlotte cannot match, and the "heart of the Carolina's" adds more meaning.
- **World's Largest U.S. Military Installation:** with its stimulus to the local retail and residential economy, its vendor and supplier base, plus 7,000 annual transitioning personnel, the importance of Fort Bragg's location beside Fayetteville and in Cumberland County can't be understated. The post provides not only these benefits, but a shield for economic cycles.

Point-of-Difference: *is where America's most highly trained professionals and most devoted neighbors always go further for you*

- **America's Most Highly Trained Professionals:** as the U.S. Army's premier power projection platform, Ft. Bragg is necessarily home to the most highly trained military professionals in America. Between the Special Operations Command, 82nd Airborne (including the logistics-driven ESC) and FORSCOM, Bragg attracts and retains top talent with a vast array of skills – warriors, diplomats and problem solvers. Some 7,000 of these professionals leave the Army annually and are available to Fayetteville/Cumberland County employers.
- **Most Devoted Neighbors:** throughout its history and today, Fayetteville and Cumberland County have been known for their generosity, supportiveness, acceptance of newcomers, conviction and care of one another. The support of early settlers and Revolutionary War soldiers. Enduring two city burnings and rebuilding. Assisting one another in times of natural disaster. The breadth of its religious and non-profit community. The City's designation as North Carolina's Most Generous City and its distinction of having one of the strongest Kiwanis Clubs (and other service clubs) in America. All of these facts (and more) support the community's position as home of America's most devoted neighbors.
- **Always Go Further For You:** this is the very essence of the people of Fayetteville & Cumberland County – they always go further, willing to serve, act and advance one another and their community.



**Benefit:** *encouraging, enabling and advancing your goals and dreams.*

- **Encouraging:** this sentiment echoes the 4Ps (A Positive Place for Positive People). This community seeks to build people, institutions and businesses up.
- **Enabling:** this idea speaks to generosity and ingenuity. This community will find a way to assist worthy ideas and initiatives.
- **Advancing:** through people, commitment, infrastructure and greater effort (its own level of power projection), F-CC tries harder and delivers more to those it serves.
- **Goals:** every person, worker, family, business and visitor has a goal. F-CC owns and advances those goals.
- **Dreams:** in the higher order realm, everyone has dreams. F-CC stands ready to help you, your family or your business fulfill your dreams.

# Authentic and aspirational

Living into the *Always Going Further* DNA puts positive pressure on all of the stakeholders:

- **City, towns, county, healthcare providers, PWC and ALL community stakeholders** will need to work intensively (and together) to live up to the promise of readiness, willingness, responsiveness and action
- **Economic development** has the energy and responsiveness, now incentives, workforce training, available sites and elements of successful deals must always go further
- **The CVB and** will need to expand their context to deliver not only a themed and adventure experience, but incorporate a service-driven experience (to broaden reach and widen audience)
- **Downtown** also has a wonderful opportunity to enhance its already charming experience with an at-the-ready, going-further service mindset and experience
- **The arts and culture community** must continue to push forward passionately as they always have for funding, new ideas, new audiences and new impact

## Takeaways

- Your first campaign should be targeted to your people
- City-County unity and cooperation will be important. To project unity, we suggest “sibling” brands over “cousin” brands
- Your international culture is best shared as a message of “all are welcome and accepted” (think Ellis Island over United Nations)
- The world knows your military linkage well. It is a core driver of your DNA, but now tell them the rest of your incredible story.
- It is time to share the new dimension of Fayetteville & Cumberland County that is not understood from afar



# Fayetteville & Cumberland County DNA Platform Statement

Target Audience: *For those interested in a southern location with a global perspective and new energy*

Frame of Reference: *Fayetteville and Cumberland County, at the heart of the Carolinas and home to the world's largest U.S. military installation*

Point-of-Difference: *is where America's most highly trained professionals and most devoted neighbors always go further for you,*

Benefit: *encouraging, enabling and advancing your goals and dreams.*

# Next Steps

- DNA consensus
- Local commitment to own and drive the brand
- Creative and action plan development for internal and external collaboration and deployment
  - Logo system
  - Tagline and key messaging
  - Brand narrative
  - Advertisements
  - Wayfinding
  - Physical environment
  - Merchandise
  - Key partner applications
  - Business community, schools
  - Brand standards guide
  - **Brand action ideas and strategies; marketing activation plans**

## Vision Survey – 134 Stakeholders

### Age

- Under 18: **0%**
- 18 - 24: **0%**
- 25 - 34: **3.74%**
- 35 - 44: **15.89%**
- 45 - 54: **28.04%**
- 55 - 64: **32.71%**
- 65 - 74: **12.15%**
- Over 75: **4.67%**

### Gender

- Male: **49.50%**
- Female: **46.7%**
- Prefer not to answer: **3.7%**

### Relationship to Fayetteville-CC

- Live Fay: **73.33%**
- Live CC outside Fay: **16.91%**
- Work Fay: **87.63%**
- Work CC outside Fay: **7.37%**
- Live Neither: **10.48%**
- Work Neither: **5.26%**

### Race

- White (not Hispanic): **66.36%**
- Latino(a): **2.80%**
- African-American: **17.76%**
- Asian: **1.87%**
- Multi-racial: **2.80%**
- Other: **1.87%**

## Community Survey – 3,051 Respondents

### Age

- Under 18: **0.19%**
- 18 - 24: **2.82%**
- 25 - 34: **12.89%**
- 35 - 44: **17.65%**
- 45 - 54: **22.68%**
- 55 - 64: **25.05%**
- 65 - 74: **12.58%**
- Over 75: **2.29%**
- No Answer: **3.85%**

### Gender

- Male: **30.96%**
- Female: **63.71%**
- No Answer: **5.34%**

### Relationship to Fayetteville-CC

- Live Fay: **64.86%**
- Live CC outside Fay: **23.91%**
- Work Fay: **77.05%**
- Work CC outside Fay: **12.14%**
- Live Neither: **11.23%**
- Work Neither: **10.8%**

### Length of Residence/Work in Fayetteville-CC

- < 5 yrs: **12.86%**
- 6 - 10 yrs: **10.08%**
- 11 - 15 yrs: **9.52%**
- 16-20 yrs: **9.39%**
- 20+ yrs: **58.15%**

### Race

- White (not Hispanic): **60.14%**
- African-American: **17.70%**
- Latino(a): **3.39%**
- Native American/Alaska Native: **0.88%**
- Asian: **0.95%**

### Race (cont'd.)

- Pacific Islander/Native Hawaiian: **0.23%**
- Multi-racial: **3.43%**
- Other: **2.14%**
- No answer: **11.14%**

### Household Income

- < \$49,999: **19.57%**
- \$50,000 - \$99,999: **30.29%**
- \$100,000 - \$149,999: **18.50%**
- \$150,000 - \$199,999: **8.39%**
- \$200,000 - \$249,999: **4.04%**
- > \$250,000: **3.55%**
- No answer: **15.54%**

## CAP Study – 413 Respondents

### Age

- Under 18: **0.00%**
- 18 - 24: **15.01%**
- 25 - 34: **22.76%**
- 35 - 44: **18.89%**
- 45 - 54: **15.25%**
- 55 - 64: **14.29%**
- 65 - 74: **10.41%**
- Over 75: **3.39%**

### Gender

- Male: **49.64%**
- Female: **50.36%**

### Race

- White (not Hispanic): **71.19%**
- Latino(a): **3.63%**
- African-American: **18.16%**
- Asian: **2.18%**
- Other: **0.97%**
- Native American or Alaska Native: **.48%**

### Household Income

- < \$49,999: **46.73%**
- \$50,000 - \$74,999: **22.03%**
- \$75,000 - \$99,999: **13.80%**
- \$100,000 - \$149,999: **12.11%**
- \$150,000 - \$199,999: **2.42%**
- \$200,000 - \$249,999: **1.69%**
- > \$250,000: **1.21%**

### Residence

- Greensboro, NC area: **25.18%**
- Raleigh, NC area: **25.18%**
- Charlotte, NC area: **25.18%**
- Wilmington, NC area: **24.46%**