+ Fayetteville & Cumberland County, NC

Brand Research & Strategy Presentation
September 18, 2019
Research

Strategic DNA

Creativity & Action
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

- 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)

Vision of Stakeholders

Competitive Position

Perception of Consumers
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
Materials Audit

- 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)
- 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

**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

LOCAL PERCEPTIONS
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?"

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

Detractors

Passives

Promoters
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...

-31.09% Living

-15.45% Visiting

-17.84% Conducting Business

Fayetteville National Average
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...

- Living: -26.97%
- Visiting: -21.58%
- Conducting Business: -22.00%

Cumberland County  National Average
One Word Descriptions

**Patriotic**
**Resilient**
**Caring, serving**
**Misfits/underdogs**
**Vibrant**
**Charming**
**“Fayette-nam”**
**Easily accessed**
**Diverse**
**Small town**

**Proud**
**Family-oriented**
**Under-valued**
**82nd Airborne**
**Welcoming**
**Inclusive**
**Hardworking**
**All-American**
**Driven**
**Midpoint**
Which of the following are the best descriptors for Fayetteville? Choose up to three answers only.

- Military town: 68.33%
- Patriotic, All-American: 37.49%
- Diverse, global melting pot: 34.32%
- Affordable: 26.82%
- Historic: 21.20%
- Dirty, unattractive appearance: 17.45%
- Dangerous, crime-ridden: 17.25%
- Family-friendly: 13.01%
- Poor: 9.81%
- Welcoming: 8.36%
- Comfortable: 7.64%
- Other: 6.82%
- Conservative: 6.57%
- Artistic, creative: 5.71%
- Progressive: 5.68%
- Quaint, charming: 2.38%

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.

- Military: 56.52%
- Growing: 39.09%
- Affordable: 33.22%
- Patriotic: 27.27%
- Midpoint between NY and FL: 26.84%
- Country, rural: 21.60%
- Distressed, poor: 17.60%
- Family-friendly: 16.29%
- Historic: 13.10%
- Conservative: 9.63%
- Scenic, beautiful: 8.82%
- Hardworking: 7.47%
- Progressive: 4.28%
- Other: 3.26%

Other:
- Boring, nothing to do
- Diverse
- Crime-ridden
### Greatest Assets

<table>
<thead>
<tr>
<th>Fayetteville &amp; Cumberland County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skilled workforce</td>
</tr>
<tr>
<td>7,000 Bragg retirees available annually</td>
</tr>
<tr>
<td>Cost of living/value</td>
</tr>
<tr>
<td>Beaches and mountains proximity</td>
</tr>
<tr>
<td>Warm, accepting people</td>
</tr>
<tr>
<td>Location, accessibility (I-95)</td>
</tr>
<tr>
<td>Secondary education</td>
</tr>
<tr>
<td>Airborne and Special Ops Museum (ASOM)</td>
</tr>
<tr>
<td>Arts scene, culture</td>
</tr>
<tr>
<td>Higher education institutions</td>
</tr>
<tr>
<td>Cape Fear River</td>
</tr>
<tr>
<td>Baseball stadium</td>
</tr>
<tr>
<td>People look out for each other</td>
</tr>
<tr>
<td>Faith-based community</td>
</tr>
<tr>
<td>Diversity, melting pot of Carolinas</td>
</tr>
<tr>
<td>Real America - microcosm of America</td>
</tr>
<tr>
<td>Community of strong work ethic, honest nature</td>
</tr>
</tbody>
</table>
Community Survey

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

- Fort Bragg: 56.16%
- Central location, access to I-95: 48.84%
- Downtown Fayetteville: 29.10%
- Proximity, central location: 27.82%
- Higher education: 21.44%
- Diversity, global feel: 20.15%
- Restaurants and breweries: 19.15%
- Cape Fear River: 12.70%
- History and museums: 12.56%
- Quality of life: 8.29%
- Outdoor recreation, sports: 5.34%
- Arts scene: 5.27%
- Other: 4.86%
- Pro-business attitude: 3.95%
- Youthful residents: 3.26%
- Well-trained workforce, work ethic: 2.64%

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.

- Fort Bragg: 55.39%
- Location on I-95: 53.54%
- Room to grow: 35.24%
- Ex-military residents: 28.73%
- Small town atmosphere: 24.42%
- Cape Fear River: 18.48%
- Parks and trails: 14.38%
- Higher education: 9.18%
- Agriculture: 8.26%
- Arts and culture amenities: 7.16%
- Public schools (K-12): 7.05%
- Entrepreneurial spirit: 6.76%
- Outdoor recreation, sports: 5.02%
- Scenic beauty: 4.84%
- Other: 2.46%
- Industry and manufacturing: 1.53%

Other:
- Affordability
- Diversity
- Baseball stadium
Fayetteville & Cumberland County

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.

- Military connection, Fort Bragg: 80.54%
- Downtown Fayetteville: 34.52%
- Diverse residents, global melting pot: 32.88%
- Affordable lifestyle: 31.41%
- Central location: 25.02%
- Family-oriented: 12.89%
- Community engagement: 11.71%
- Higher education: 11.57%
- Arts and culture: 10.48%
- Business, job opportunities: 10.10%
- Quality of life: 9.40%
- Other: 3.95%
- Youth: 2.31%

Other:
- History
- I-95 and I-295
- Shopping areas
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.

- Military connection, Fort Bragg (74.46%)
- Location in NC and East Coast (43.01%)
- City of Fayetteville, Downtown (37.80%)
- Affordable lifestyle (32.32%)
- Cape Fear River (20.98%)
- Small towns, charm (18.19%)
- Arts and cultural events, festivals (15.17%)
- Rural character (13.02%)
- Agriculture (8.90%)
- Outdoor recreation (5.31%)
- Natural resources (4.70%)
- Industry and manufacturing (3.84%)
- Other (2.87%)

Other:
- Higher education
- Diversity
Fayetteville & Cumberland County

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.*

- Negative reputation/perception: 45.48%
- Lack of large employers: 30.31%
- Homelessness: 25.61%
- Crime: 25.13%
- Good old boys network: 22.96%
- Quality of public education: 21.20%
- Suitable jobs for available workforce: 20.32%
- Poverty: 17.19%
- Blight, unattractive appearance: 16.68%
- Over-emphasis on Fort Bragg: 15.54%
- Recruiting and keeping talent: 14.29%
- Cooperation between City and County: 12.78%
- Drug and alcohol use: 11.57%
- Revitalizing Downtown Fayetteville: 8.49%
- Other: 5.91%
- Over-emphasis on Fayetteville: 2.46%

**Other:**
- Entertainment options
- Traffic
- City government
Fayetteville & Cumberland County

- 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.*

- Good first impression and positive reputation: 35.83%
- Large employers: 34.06%
- Suitable jobs for available workforce: 30.63%
- Strong K-12 education: 28.08%
- Reasons to visit: 22.84%
- Nightlife, activities for young adults: 16.24%
- Cooperation between City and County: 15.65%
- Marketing and promotion of area: 15.09%
- Vision for future, new leadership: 13.80%
- Sophistication: 11.99%
- High-end retail and events: 11.51%
- Family-friendly activities: 10.11%
- Young, Millennial workforce: 9.85%
- Identity, distinction: 8.08%
- Other (please specify): 7.79%
- Community engagement: 7.34%
- Self-esteem: 7.20%
- Communication between City and towns: 6.20%

Other:
- Safety
- Walkability, park trails
- Mass transit/traffic flow solution
Fayetteville & Cumberland County

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 Fayettenam)
- 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

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
Do you consider Fayetteville to be business friendly?

- **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

Do you consider Cumberland County to be business friendly?

- **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.

- **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?

<table>
<thead>
<tr>
<th>Fayetteville</th>
<th>Cumberland County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skilled workforce</td>
<td>Skilled workforce</td>
</tr>
<tr>
<td>Location</td>
<td>Available space</td>
</tr>
<tr>
<td>95/295 Corridors</td>
<td>95/295 Corridors</td>
</tr>
<tr>
<td>Available space</td>
<td>Location</td>
</tr>
<tr>
<td>Affordability</td>
<td>Tax incentives</td>
</tr>
<tr>
<td>Transient</td>
<td>Affordability</td>
</tr>
<tr>
<td>Military</td>
<td>Transient</td>
</tr>
<tr>
<td>Population</td>
<td>Affordable labor</td>
</tr>
<tr>
<td>Affordable labor</td>
<td>Military</td>
</tr>
<tr>
<td>Diversity</td>
<td>Small town feel</td>
</tr>
<tr>
<td>Growing</td>
<td>Youth</td>
</tr>
<tr>
<td>Higher education</td>
<td>Diversity</td>
</tr>
<tr>
<td>Fayetteville</td>
<td>Cumberland County</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------</td>
</tr>
<tr>
<td>• Shared vision/plan</td>
<td>• Marketing</td>
</tr>
<tr>
<td>• High paying jobs</td>
<td>• Shared vision/plan</td>
</tr>
<tr>
<td>• Dining</td>
<td>• City/County collaboration</td>
</tr>
<tr>
<td>• Entertainment</td>
<td>• High paying jobs</td>
</tr>
<tr>
<td>• Marketing</td>
<td>• Entertainment</td>
</tr>
<tr>
<td>• Economic growth</td>
<td>• Identity</td>
</tr>
<tr>
<td>• Educated workforce</td>
<td>• Industry</td>
</tr>
<tr>
<td>• Quality of life</td>
<td>• Matching talent with positions</td>
</tr>
<tr>
<td>• Amenities</td>
<td>• New leadership</td>
</tr>
<tr>
<td>• Beautification</td>
<td>• Quality of life</td>
</tr>
<tr>
<td>• Corporations</td>
<td>• Corporations</td>
</tr>
<tr>
<td>• Downtown development</td>
<td>• Educated workforce</td>
</tr>
</tbody>
</table>
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

Identity

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
## Stakeholders

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

<table>
<thead>
<tr>
<th>Marquis de Lafayette</th>
<th>J. Cole</th>
<th>Martin Luther King, Jr.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young, military ties, a vision for the future</td>
<td>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</td>
<td>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</td>
</tr>
</tbody>
</table>

*A risk taker, a person unwilling to take no for an answer, resilient, dynamic, brave.*
Stakeholders

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

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
Consumer Awareness & Perception Study

413 EXTERNAL responses
Charlotte, Greensboro, Raleigh, and Wilmington
External Perceptions
### CAP Study

**In which area do you currently reside?**

<table>
<thead>
<tr>
<th>Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greensboro, NC area</td>
<td>25.18%</td>
</tr>
<tr>
<td>Raleigh, NC area</td>
<td>25.18%</td>
</tr>
<tr>
<td>Charlotte, NC area</td>
<td>25.18%</td>
</tr>
<tr>
<td>Wilmington, NC area</td>
<td>24.46%</td>
</tr>
</tbody>
</table>
CAP Study Have you or your immediate family member ever been stationed at Fort Bragg?

- Yes: 42.35%
- No: 57.65%
Unaided Perceptions
# CAP Study

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

<table>
<thead>
<tr>
<th>City</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Durham, NC</strong></td>
<td>College town, Minor league baseball, Close to Raleigh, Business</td>
</tr>
<tr>
<td><strong>Fayetteville, NC</strong></td>
<td>Military/Army base, Country/Rural, Crime, University</td>
</tr>
<tr>
<td><strong>Greensboro, NC</strong></td>
<td>University, Shopping, Airport, Coliseum</td>
</tr>
<tr>
<td><strong>Jacksonville, NC</strong></td>
<td>Military/Marine Corps Base, Country/Rural, Beach, Boring</td>
</tr>
<tr>
<td><strong>Pinehurst/Southern Pines, NC</strong></td>
<td>Golf, Country/Rural, Affluent, Nice</td>
</tr>
<tr>
<td><strong>Wilmington, NC</strong></td>
<td>Beach, Battleship, Fishing, Shopping</td>
</tr>
</tbody>
</table>
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
From your perspective, do you think the following cities are on the rise, staying the same, or have their best days behind them?
From your perspective, do you think the following cities are on the rise, staying the same, or have their best days behind them?
From your perspective, do you think the following cities are on the rise, staying the same, or have their best days behind them?
From your perspective, do you think the following cities are on the rise, staying the same, or have their best days behind them?

- **Jacksonville, NC**: 17.31% on the rise, 15.38% staying the same, 10.10% best days behind.
- **Pinehurst/Southern Pines, NC**: 62.02% on the rise, 27.88% staying the same, 9.13% best days behind.
- **Wilmington, NC**: 54.33% on the rise, 36.54% staying the same, 9.13% best days behind.

**CAP Study**

**CHARLOTTE & RALEIGH RESPONDENTS ONLY**
Which of the following cities do you most associate with **arts and culture**? Choose two answers.

- Durham, NC: 55.45%
- Wilmington, NC: 47.94%
- Greensboro, NC: 40.92%
- Other: 15.01%
- Fayetteville, NC: 13.56%
- Pinehurst/Southern Pines, NC: 13.32%
- Jacksonville, NC: 6.54%

Other:
- Asheville
- Raleigh
- Charlotte
CHARLOTTE & RALEIGH RESPONDENTS ONLY

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

Choose two answers.

- Durham, NC: 57.69%
- Wilmington, NC: 40.87%
- Greensboro, NC: 37.98%
- Fayetteville, NC: 18.27%
- Other: 17.31%
- Pinehurst/Southern Pines, NC: 15.38%
- Jacksonville, NC: 5.29%
Which of the following cities do you most associate with an international culture and population?

Choose two answers.

- Durham, NC (49.39%)
- Greensboro, NC (36.08%)
- Wilmington, NC (35.59%)
- Fayetteville, NC (31.48%)
- Jacksonville, NC (20.58%)
- Pinehurst/Southern Pines, NC (8.96%)
- Other: Charlotte, Raleigh, Asheville (8.96%)
Which of the following cities do you most associate with an international culture and population? Choose two answers.

- Durham, NC: 51.92%
- Fayetteville, NC: 36.06%
- Greensboro, NC: 33.65%
- Wilmington, NC: 33.65%
- Jacksonville, NC: 18.27%
- Other: 10.58%
- Pinehurst/Southern Pines, NC: 8.65%
CAP Study

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

- Durham, NC: 49.88%
- Greensboro, NC: 42.62%
- Fayetteville, NC: 39.71%
- Wilmington, NC: 25.18%
- Jacksonville, NC: 20.58%
- Pinehurst/Southern Pines, NC: 9.44%
- Other: 6.54%

Other:
- Charlotte
- Raleigh
- Winston-Salem
Which of the following cities do you most associate with **ethnic diversity**?

*Choose two answers.*

- Durham, NC: 50.00%
- Fayetteville, NC: 44.23%
- Greensboro, NC: 35.58%
- Wilmington, NC: 23.08%
- Jacksonville, NC: 20.67%
- Pinehurst/Southern Pines, NC: 13.94%
- Other: 6.73%
Which of the following cities do you most associate with **interesting history**?

*Choose two answers.*

- Wilmington, NC: 55.69%
- Durham, NC: 39.47%
- Greensboro, NC: 33.17%
- Fayetteville, NC: 30.75%
- Jacksonville, NC: 16.95%
- Pinehurst/Southern Pines, NC: 13.08%
- Other: Raleigh, Charlotte, Asheville, New Bern
Which of the following cities do you most associate with interesting history?

Choose two answers.

- Wilmington, NC: 51.92%
- Durham, NC: 42.31%
- Fayetteville, NC: 34.13%
- Greensboro, NC: 26.92%
- Jacksonville, NC: 16.35%
- Pinehurst/Southern Pines, NC: 16.35%
- Other: 6.73%
In which of the following cities would you expect to find highly trained talent with advanced skills?

Choose two answers.

Other:
- Raleigh
- Charlotte
In which of the following cities would you expect to find highly trained talent with advanced skills?
Choose two answers.

- Durham, NC: 61.54%
- Greensboro, NC: 47.60%
- Fayetteville, NC: 27.40%
- Wilmington, NC: 21.63%
- Pinehurst/Southern Pines, NC: 14.42%
- Jacksonville, NC: 10.58%
- Other: 10.58%
Which of the following cities do you most associate with strength of character and generosity of spirit? Choose two answers.

- Wilmington, NC: 44.79%
- Greensboro, NC: 33.66%
- Durham, NC: 30.02%
- Pinehurst/Southern Pines, NC: 28.33%
- Fayetteville, NC: 26.88%
- Jacksonville, NC: 20.82%
- Other: 6.54%

Other: Raleigh, Charlotte, Asheville
Which of the following cities do you most associate with strength of character and generosity of spirit? Choose two answers.
Which of the following cities are you **most interested in visiting**?

*Choose two answers.*

- Wilmington, NC: 63.20%
- Pinehurst/Southern Pines, NC: 33.41%
- Greensboro, NC: 28.33%
- Durham, NC: 26.39%
- Fayetteville, NC: 20.10%
- Jacksonville, NC: 16.46%
- Other: 8.23%

Other:
- Asheville
- Charlotte
- Raleigh
Which of the following cities are you most interested in visiting? Choose two answers.

- Wilmington, NC: 63.46%
- Pinehurst/Southern Pines, NC: 33.17%
- Greensboro, NC: 29.33%
- Durham, NC: 26.44%
- Fayetteville, NC: 21.63%
- Jacksonville, NC: 15.38%
- Other: 7.21%
<table>
<thead>
<tr>
<th>City</th>
<th>Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pinehurst/Southern Pines, NC</td>
<td>Golf</td>
</tr>
<tr>
<td></td>
<td>Visit family</td>
</tr>
<tr>
<td></td>
<td>Shopping</td>
</tr>
<tr>
<td></td>
<td>Scenery</td>
</tr>
<tr>
<td>Fayetteville, NC</td>
<td>Shopping</td>
</tr>
<tr>
<td></td>
<td>Military facilities</td>
</tr>
<tr>
<td></td>
<td>Visit family</td>
</tr>
<tr>
<td></td>
<td>History</td>
</tr>
<tr>
<td>Greensboro, NC</td>
<td>Shopping</td>
</tr>
<tr>
<td></td>
<td>Visit family/friends</td>
</tr>
<tr>
<td></td>
<td>Visit university</td>
</tr>
<tr>
<td></td>
<td>Go to a concert</td>
</tr>
<tr>
<td>Durham, NC</td>
<td>Shopping</td>
</tr>
<tr>
<td></td>
<td>Dine out</td>
</tr>
<tr>
<td></td>
<td>Baseball</td>
</tr>
<tr>
<td></td>
<td>Visit Duke</td>
</tr>
<tr>
<td>Jacksonville, NC</td>
<td>Go to beach</td>
</tr>
<tr>
<td></td>
<td>Military facilities</td>
</tr>
<tr>
<td></td>
<td>Visit family</td>
</tr>
<tr>
<td></td>
<td>History</td>
</tr>
<tr>
<td>Wilmington, NC</td>
<td>Beach vacation</td>
</tr>
<tr>
<td></td>
<td>Dine out</td>
</tr>
<tr>
<td></td>
<td>Work/Business</td>
</tr>
<tr>
<td></td>
<td>History</td>
</tr>
<tr>
<td>Pinehurst/Southern Pines, NC</td>
<td>Golf</td>
</tr>
<tr>
<td></td>
<td>Visit family</td>
</tr>
<tr>
<td></td>
<td>Shopping</td>
</tr>
<tr>
<td></td>
<td>Scenery</td>
</tr>
</tbody>
</table>
CAP Study

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

Less likely to visit 46.73%
More likely to visit 53.27%

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

*Choose three answers.*

<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Military town</td>
<td>71.19%</td>
</tr>
<tr>
<td>Historic</td>
<td>39.95%</td>
</tr>
<tr>
<td>All-American</td>
<td>36.08%</td>
</tr>
<tr>
<td>Dangerous, crime-ridden</td>
<td>19.13%</td>
</tr>
<tr>
<td>Diverse, global melting pot</td>
<td>18.89%</td>
</tr>
<tr>
<td>Boring, nothing to do</td>
<td>15.25%</td>
</tr>
<tr>
<td>Affordable</td>
<td>15.01%</td>
</tr>
<tr>
<td>Comfortable, family-friendly</td>
<td>14.77%</td>
</tr>
<tr>
<td>Dirty, unattractive appearance</td>
<td>14.29%</td>
</tr>
<tr>
<td>Up and coming</td>
<td>10.65%</td>
</tr>
<tr>
<td>Quaint, charming</td>
<td>10.65%</td>
</tr>
<tr>
<td>Artistic, creative</td>
<td>8.96%</td>
</tr>
<tr>
<td>Advanced workforce and skills</td>
<td>8.47%</td>
</tr>
<tr>
<td>Poor</td>
<td>8.23%</td>
</tr>
<tr>
<td>Forward-thinking</td>
<td>4.60%</td>
</tr>
<tr>
<td>Other</td>
<td>3.87%</td>
</tr>
</tbody>
</table>

Other:
- Gangs, violence
- Shopping and dining options
- Amtrak stop
Which phrase or adjective best describes Cumberland County, NC?

Choose three answers.

- Military: 36.32%
- Country, rural: 35.11%
- Historic: 27.85%
- Patriotic: 24.21%
- Family-friendly: 23.97%
- Growing: 19.13%
- Agricultural: 19.13%
- Boring, nothing to do: 18.16%
- Hardworking: 17.68%
- Scenic, beautiful: 17.43%
- Affordable: 15.98%
- Distressed, poor: 15.01%
- Up and coming: 10.41%
- Midpoint between NY & FL: 9.20%
- Forward-thinking: 7.02%
- Other: 3.39%

Other:
- Not sure
- On Cape Fear River
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
What was the primary purpose or main reason you visited Fayetteville or Cumberland County on your most recent visit?

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit family or friends (not military)</td>
<td>25.22%</td>
</tr>
<tr>
<td>Visit family or friends in the military</td>
<td>12.83%</td>
</tr>
<tr>
<td>Passing through</td>
<td>11.95%</td>
</tr>
<tr>
<td>Other</td>
<td>7.52%</td>
</tr>
<tr>
<td>Conduct business</td>
<td>7.08%</td>
</tr>
<tr>
<td>Visit Ft. Bragg</td>
<td>5.75%</td>
</tr>
<tr>
<td>Go shopping</td>
<td>4.87%</td>
</tr>
<tr>
<td>Eat at a restaurant</td>
<td>4.87%</td>
</tr>
<tr>
<td>Attend church or religious service</td>
<td>3.54%</td>
</tr>
<tr>
<td>Attend a meeting or convention</td>
<td>2.65%</td>
</tr>
<tr>
<td>Visit a college or university</td>
<td>2.65%</td>
</tr>
<tr>
<td>Attend a sporting event</td>
<td>1.77%</td>
</tr>
<tr>
<td>Visit a museum, historic site, or botanical garden</td>
<td>1.77%</td>
</tr>
<tr>
<td>Attend a special event or festival</td>
<td>1.77%</td>
</tr>
<tr>
<td>Participate in youth or adult sports</td>
<td>1.77%</td>
</tr>
<tr>
<td>Car trouble on interstate</td>
<td>1.77%</td>
</tr>
<tr>
<td>Attend a wedding or reunion</td>
<td>0.88%</td>
</tr>
<tr>
<td>Outdoor recreation (boating, fishing, hiking, etc.)</td>
<td>0.88%</td>
</tr>
<tr>
<td>Meet with a realtor</td>
<td>0.44%</td>
</tr>
<tr>
<td>Attend musical or theater performance</td>
<td>0.00%</td>
</tr>
</tbody>
</table>
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 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

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

- Positive change: 41.15%
- No change: 50.00%
- Negative change: 8.85%

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
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
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
<table>
<thead>
<tr>
<th>INTERNAL</th>
<th>EXTERNAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Military town</td>
<td>Military town</td>
</tr>
<tr>
<td>“Fayettenam”</td>
<td>Historic</td>
</tr>
<tr>
<td>Dangerous, crime-ridden</td>
<td>All-American</td>
</tr>
<tr>
<td>Boring, nothing to do</td>
<td>Rural, agriculture</td>
</tr>
<tr>
<td>Rural, country</td>
<td>Dangerous, crime-ridden</td>
</tr>
<tr>
<td>Dirty, unattractive appearance</td>
<td>Higher education institutions</td>
</tr>
<tr>
<td>Dogwood Festival</td>
<td>Historic</td>
</tr>
<tr>
<td>International Folk Festival</td>
<td>Small town feel</td>
</tr>
<tr>
<td></td>
<td>Family-friendly</td>
</tr>
<tr>
<td></td>
<td>Southern charm and hospitality</td>
</tr>
<tr>
<td></td>
<td>Improved downtown</td>
</tr>
<tr>
<td></td>
<td>Cultural diversity</td>
</tr>
<tr>
<td>What Fayetteville and Cumberland County &lt;&lt; Think OUTSIDERS say</td>
<td></td>
</tr>
<tr>
<td>VS.</td>
<td></td>
</tr>
<tr>
<td>What OUTSIDERS do say &gt;&gt;</td>
<td></td>
</tr>
</tbody>
</table>
Non-Visitors
CAP Study

Why have you not visited Fayetteville or Cumberland County?

- Not interested in what it has to offer: 22.99%
- Unaware of things to do there: 19.79%
- Do not have time: 13.37%
- Too far away: 12.83%
- Plan to visit in the future: 8.02%
- Cannot afford to travel: 5.88%
- Have heard there is nothing special: 5.88%
- Other: 5.88%
- Unsafe, negative image: 5.35%

Other:
- Do not travel
- Travel elsewhere
- Never heard of it
Perceptions
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”.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diversity</td>
<td>7.35</td>
</tr>
<tr>
<td>Dining options</td>
<td>7.01</td>
</tr>
<tr>
<td>Affordable cost of living</td>
<td>6.86</td>
</tr>
<tr>
<td>Parks, trails, and open spaces</td>
<td>6.83</td>
</tr>
<tr>
<td>Affordable homes</td>
<td>6.82</td>
</tr>
<tr>
<td>Events and festivals</td>
<td>6.77</td>
</tr>
<tr>
<td>Shopping and entertainment options</td>
<td>6.71</td>
</tr>
<tr>
<td>Outdoor recreation</td>
<td>6.69</td>
</tr>
<tr>
<td>Location and proximity</td>
<td>6.63</td>
</tr>
<tr>
<td>Friendly and welcoming</td>
<td>6.56</td>
</tr>
<tr>
<td>Advanced workforce and skills</td>
<td>6.46</td>
</tr>
<tr>
<td>Public schools (K-12)</td>
<td>6.36</td>
</tr>
<tr>
<td>Higher education opportunities</td>
<td>6.32</td>
</tr>
<tr>
<td>Entrepreneurial spirit</td>
<td>6.32</td>
</tr>
<tr>
<td>Public transportation</td>
<td>6.30</td>
</tr>
<tr>
<td>An active arts and culture scene</td>
<td>6.28</td>
</tr>
<tr>
<td>Fun place to visit</td>
<td>6.22</td>
</tr>
<tr>
<td>Walkable, pedestrian friendly</td>
<td>6.18</td>
</tr>
<tr>
<td>Location for sports</td>
<td>6.17</td>
</tr>
<tr>
<td>Great place to raise a family</td>
<td>6.12</td>
</tr>
</tbody>
</table>
CAP Study

What is most important to Fayetteville’s identity? (Without __________, Fayetteville would lose its essence.) Choose two answers.

- Military connection, Ft. Bragg: 66.59%
- History: 28.57%
- Downtown Fayetteville: 15.50%
- Diverse residents, global melting pot: 14.77%
- Central location: 10.65%
- Family oriented: 9.44%
- Arts and culture: 8.96%
- Higher Education: 8.23%
- Businesses, job opportunities: 7.51%
- Quality of life: 5.33%
- Youth: 4.84%
- Community engagement: 4.36%
- Other: 4.12%

Other: Nightclubs, Amtrak, Scenic Views
What is most important to Cumberland County’s identity? (Without _________, Cumberland County would lose its essence.)

Choose two answers.

- Military connection, Ft. Bragg: 38.98%
- City of Fayetteville, Downtown: 20.34%
- Rural character: 17.68%
- Cape Fear River: 17.43%
- Location in NC and East Coast: 16.71%
- History: 15.98%
- Small towns, charm: 13.56%
- Agriculture: 11.38%
- Affordable lifestyle: 9.44%
- Arts and cultural events, festivals: 7.99%
- Natural resources: 6.54%
- Outdoor recreation: 5.57%
- Industry and manufacturing: 5.08%
- Other: 3.63%

Other: Not sure
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 Fayettevile
- 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

#### 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

#### External Perceptions

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**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 Fayettevile
- 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

**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

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Site Visits

Discussions with 165+ LOCAL individuals
Perspectives

- “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

- “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

- “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

- “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.”
“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

1700s
- Gristmills of Cross Creek
- Liberty Point Resolves
- Great Fire of 1831

1775 Colonists send ships of food to Massachusetts
- FILI
- Civil War Burning

2000s
- Camp Bragg
- Fort Bragg
- Current Renaissance
- Storm Responses
“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

- 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 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
Competitive Positioning Review
Competitor City Brands
Competitor County Brands

- Competitor County Flags
- Welcome to Hoke County
- Harnett County Logos
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

- **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

- **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

“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

“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.”

“People here do what they say. That’s a real rarity.”

“Work ethic has always been a fabric of our community.”
Insights

“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
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

Always Going Further

Service
Generosity
Readiness
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)
Strategy

**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.
Strategy

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.
Strategy

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**

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<th>Age</th>
<th>Percentage</th>
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<td>Live Fay</td>
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**Community Survey – 3,051 Respondents**

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<tr>
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<td>Native American/Alaska Native</td>
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<td>Asian</td>
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<tr>
<td>Pacific Islander/Native Hawaiian</td>
<td>0.23%</td>
</tr>
<tr>
<td>Multi-racial</td>
<td>3.43%</td>
</tr>
<tr>
<td>Other</td>
<td>2.14%</td>
</tr>
<tr>
<td>No answer</td>
<td>11.14%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Length of Residence/Work in Fayetteville-CC</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 5 yrs</td>
<td>12.86%</td>
</tr>
<tr>
<td>6 - 10 yrs</td>
<td>10.08%</td>
</tr>
<tr>
<td>11 - 15 yrs</td>
<td>9.52%</td>
</tr>
<tr>
<td>16-20 yrs</td>
<td>9.39%</td>
</tr>
<tr>
<td>20+ yrs</td>
<td>58.15%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Race (cont’d.)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific Islander/Native Hawaiian</td>
<td>0.23%</td>
</tr>
<tr>
<td>Multi-racial</td>
<td>3.43%</td>
</tr>
<tr>
<td>Other</td>
<td>2.14%</td>
</tr>
<tr>
<td>No answer</td>
<td>11.14%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Household Income</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; $49,999</td>
<td>19.57%</td>
</tr>
<tr>
<td>$50,000 - $99,999</td>
<td>30.29%</td>
</tr>
<tr>
<td>$100,000 - $149,999</td>
<td>18.50%</td>
</tr>
<tr>
<td>$150,000 - $199,999</td>
<td>8.39%</td>
</tr>
<tr>
<td>$200,000 - $249,999</td>
<td>4.04%</td>
</tr>
<tr>
<td>&gt; $250,000</td>
<td>3.55%</td>
</tr>
<tr>
<td>No answer</td>
<td>15.54%</td>
</tr>
</tbody>
</table>
### 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:** 0.48%

### 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%