NORTH STAR

+ Fayetteville & Cumberland County, NC

Brand Research & Strategy Summary

September 2019

An Important Note

These insights and ideas are the product of North Star's work in the community since beginning last February.

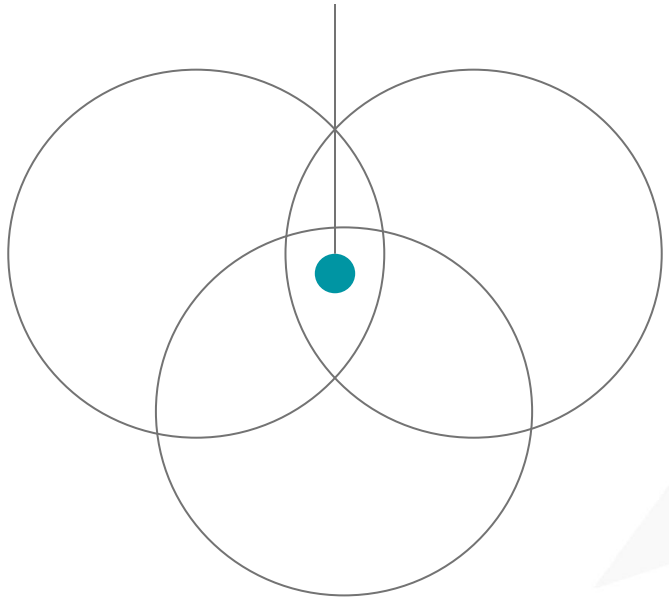
This document does not recommend the brand in a creative interpretation, but rather is **the underpinning of the creative brand still to be developed.**

This document is being shared with you **for your review and understanding of the strategic DNA statement** currently recommended.

With agreement among stakeholders on the strategic DNA statement, North Star will proceed to creative and action phases of the engagement.

Where Research Leads Us

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



Research Steps & 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**


5,000+ Voices
Uncovering Fayetteville
& Cumberland County's Unique Story

Locally Focused Research Included These Studies:

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

Research Outside of Fayetteville Included This Study:

- **Consumer Awareness & Perception Study**
  - 413 surveys completed to gauge consumer perceptions
  - Fielded in: Charlotte, Raleigh, Greensboro, Wilmington

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[8]

Historic

Small town feel

Family-friendly

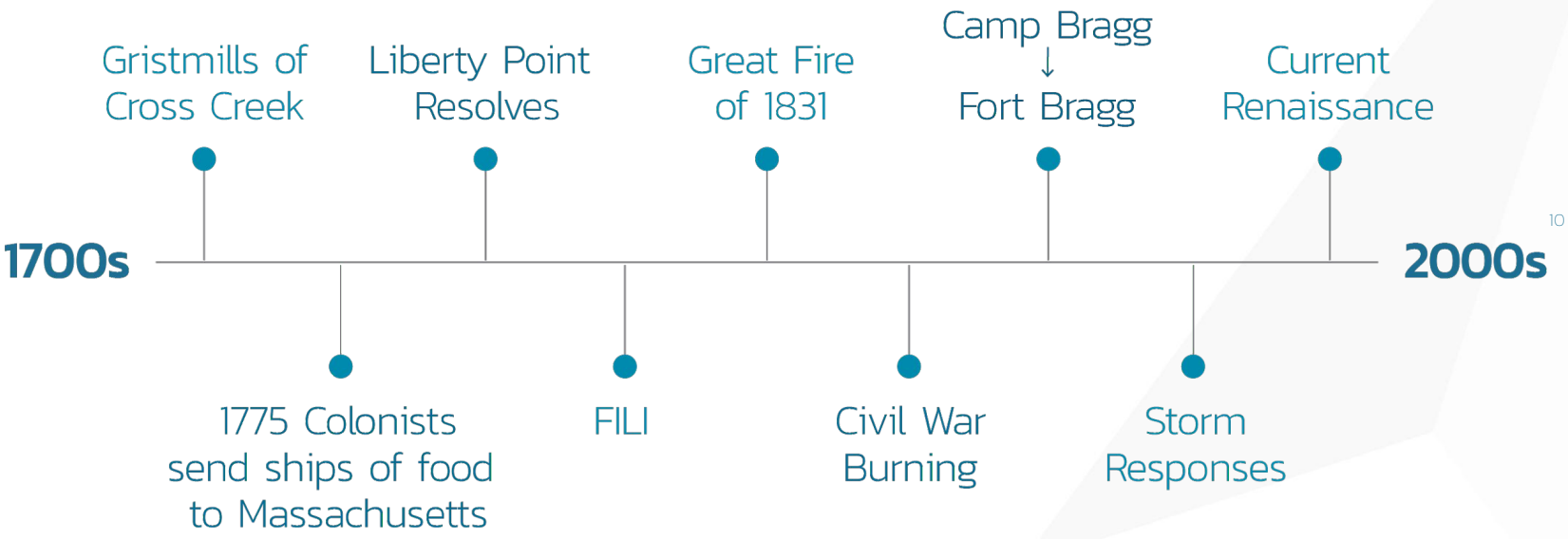
Southern charm and hospitality

Improved downtown

Cultural diversity

Community History & Accolades

A History of Resolve, Service & Action



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 (last study was 2014)
- **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.***

STRATEGY

Authentic + Aspirational

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PLACE BRANDING + MARKETING

Summary of Insights Gleaned from Research

- **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 an immediately 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 moderately 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).

STRATEGY

Platform

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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

NOTE: *Always Going Further* is not a proposed tagline, it is an expression of the community DNA

How Fayetteville & Cumberland County Always Go Further

The brand DNA idea of "Always going further" is not a slogan, it is a foundational idea for the creation of the brand still to come. Additionally, the idea is not intended to set up a "military brand." It will work across all facets of the community in these ways:

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 Rationale

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.

Strategy Rationale

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 Rationale

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 Rationale

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 and county** governments 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 downtown** will need to expand their context to deliver not only a themed and adventure experience, but a service-driven experience (to broaden reach and widen audience)
- **The arts and culture community** must continue to push forward passionately as they always have for funding, new ideas, new audiences and new impact

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**