

BRAND NC STAR PROJECT

Final Report

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UNC
KENAN-FLAGLER
BUSINESS SCHOOL

Team Born and Bred | April 2014

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WHY BRAND NORTH CAROLINA?

**Making the Case for a Statewide Umbrella
Brand**

Continuing with a lack of consistent brand produces two outcomes: 1) Lack of Awareness and 2) Inconsistency of Message

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Lack of Awareness

1 in 4

People who have never lived, worked, or traveled to North Carolina have **no perception** of the state.

Inconsistent Message

Other responses were mixed across a wide range, many negative.



Source: Primary Research (2014); General Population State Perception Survey (2014); Trone Research Survey (2009)

In the absence of proactively communicating who North Carolina is others can, and will, fill that messaging gap

5

Recent opinion editorial pieces in national news media and satirical television programs may have begun to establish a “brand” for North Carolina.

JULY 26, 2013, 4:10 PM | 317 Comments

North Carolina: First in Voter Suppression

By DAVID FIRESTONE

North Carolina First State To Cut Welfare Amid Shutdown

Reuters | Posted: 10/15/2013 8:38 pm EDT

EDITORIAL

The Decline of North Carolina

By THE EDITORIAL BOARD

Published: July 9, 2013 | Comment



“Scientists predict an economy-destroying, 39-inch sea level rise, but North Carolina drafts a law to make it eight inches.”

[Video](#)

One-fourth of current residents and one-fifth of non-residents indicate having some negative perceptions of North Carolina

6

NC Residents

26%

Of current NC residents have some negative perceptions of the state.

Non-Residents

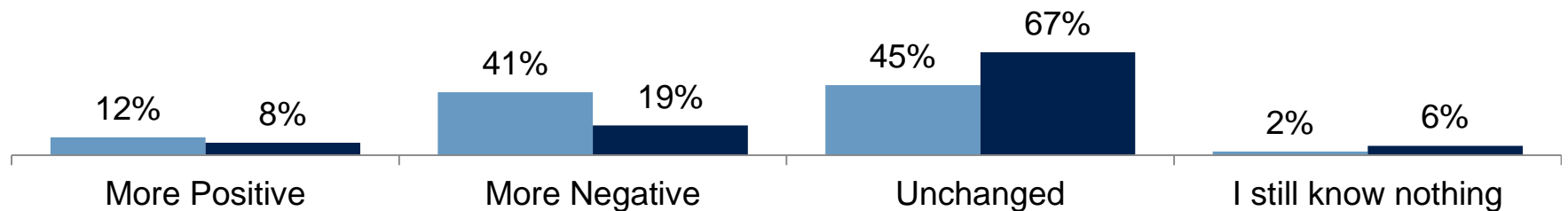
20%

Of non-residents have some negative perceptions of the state.

Negative Perceptions Trends

Have your perceptions of North Carolina changed in the past 6 Months? (Among Negative/Some Negative)

■ NC Residents (n=130) ■ Non Residents (n=99)



Source: Primary Research

Within the state, there is a lack of a consistent message across communications

7

Marketing campaigns employed by the state are not integrated, with different tourism, commerce, and internal messaging.

Additionally, State government cabinet agencies today look like separate entities with individual brands:



A key challenge of the state branding is the broad target base; this brand must consider diverse stakeholders

8



Business

Supporting the continued success of growing and attracting some of America's best businesses.



Tourism

Complement and enhance the efforts of NC Tourism to bring more visitors to the State.



Citizens

Meet the needs of all current and future citizens of North Carolina.

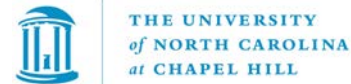
To address such a broad target, the objective is to create an umbrella brand with sub-branding as needed

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An **umbrella brand** (or family brand) strategy will create an overarching brand that captures and communicates the main themes of the State's value proposition.

Sub-brands (e.g. state agencies or executions – tourism, business recruitment) will share brand imagery and seek to highlight one or several of the key values of the parent brand while also communicating their unique differentiators.





Examples of Umbrella Brands



Creating this type of explicit umbrella brand for a state is rare and a unique challenge.

Some states have done some level of branding, which have all had positive results, suggesting a missed opportunity in not having a strong brand

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State	Brand Produced	Type of Campaign
Colorado		Statewide branding effort, with an emphasis on government efficiency
Michigan		Tourism campaign
Virginia		Tourism campaign
Kentucky		Logo and slogan

brandCOLORADO maximizes efficiency by aligning tourism and economic development behind the core state brand message

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Colorado also estimates it could save up to **\$300K** each year in graphic design fees alone at each of its 22 state agencies

The Colorado Tourism Office expects to produce a state return of **\$3.60** for every incremental \$1.00 spent in FY 2013-14 for this fully integrated branding platform



Source: brandcolorado.gov

The Pure Michigan tourism campaign indicates that a successful branding effort can significantly increase out-of-state tourism

12

The Pure Michigan campaign began regionally in 2006, and was launched nationally in 2009 with an initial spend of \$7.8M.

PURE *M*ICHIGAN®

7.7M

Trips to MI by
out-of-state
visitors since
2009

\$2.4B

Visitor spend at
MI businesses

\$167M

New tax revenue
generated for MI

\$5.76

2012 ROI of the
Pure Michigan
campaign

Source: Longwoods International

“Live Passionately” helped VA recover from the 2008 recession, resulting in increases in expenditures, employment, and taxes

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Source: Virginia Tourism Corporation

Kentucky's "Unbridled Spirit" has increased awareness of the state and improved perceptions and the overall appeal of Kentucky

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7.3%

Out-of-state residents increase
in favorable perception of KY
since Y1



8.6%

Out-of-state residents increase
in likelihood to visit KY since Y1

88.9%

KY residents correctly identified
the state brand after 3 years

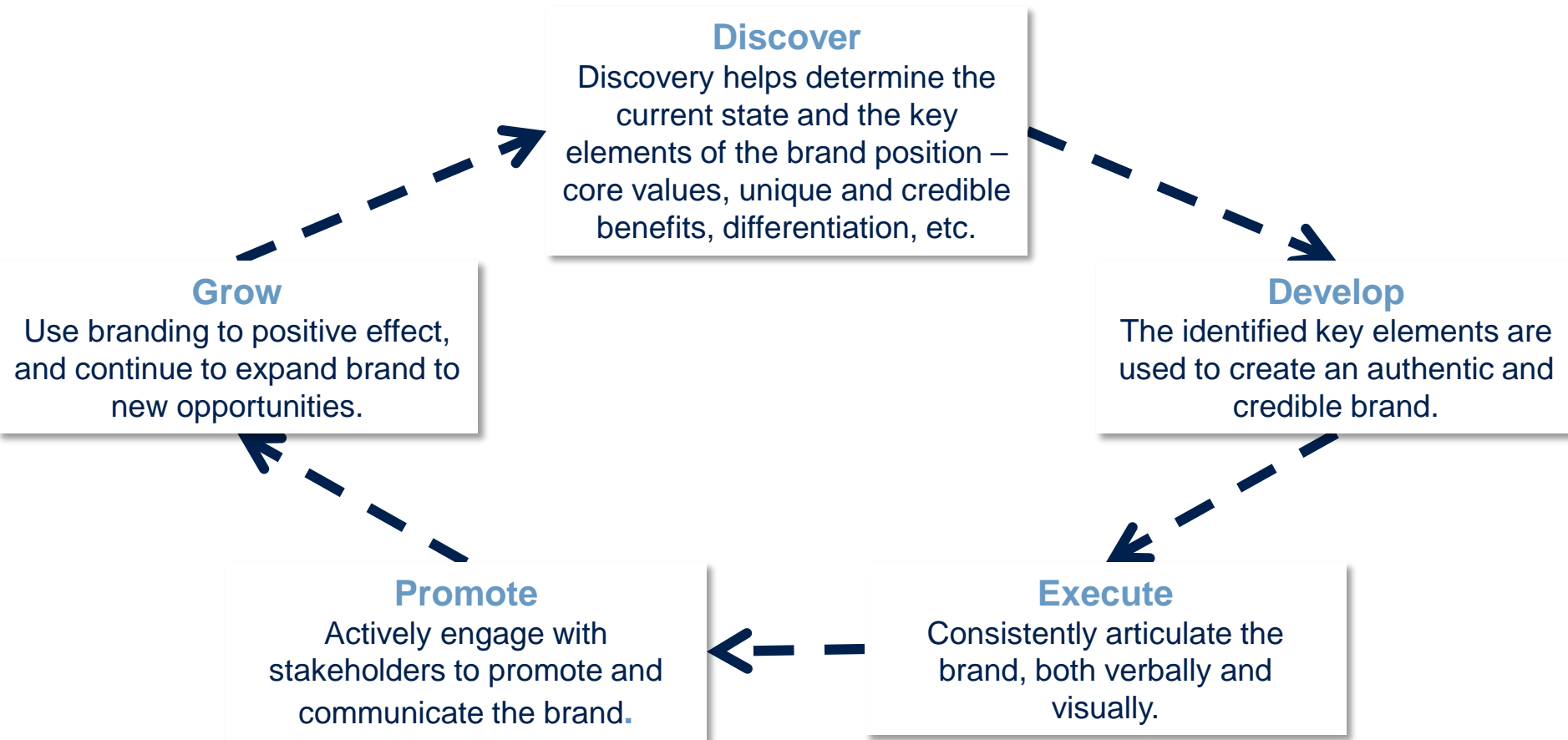
Source: kentucky.gov

HOW DO WE BUILD NORTH CAROLINA'S BRAND?

Our Approach to Identifying NC's Promise

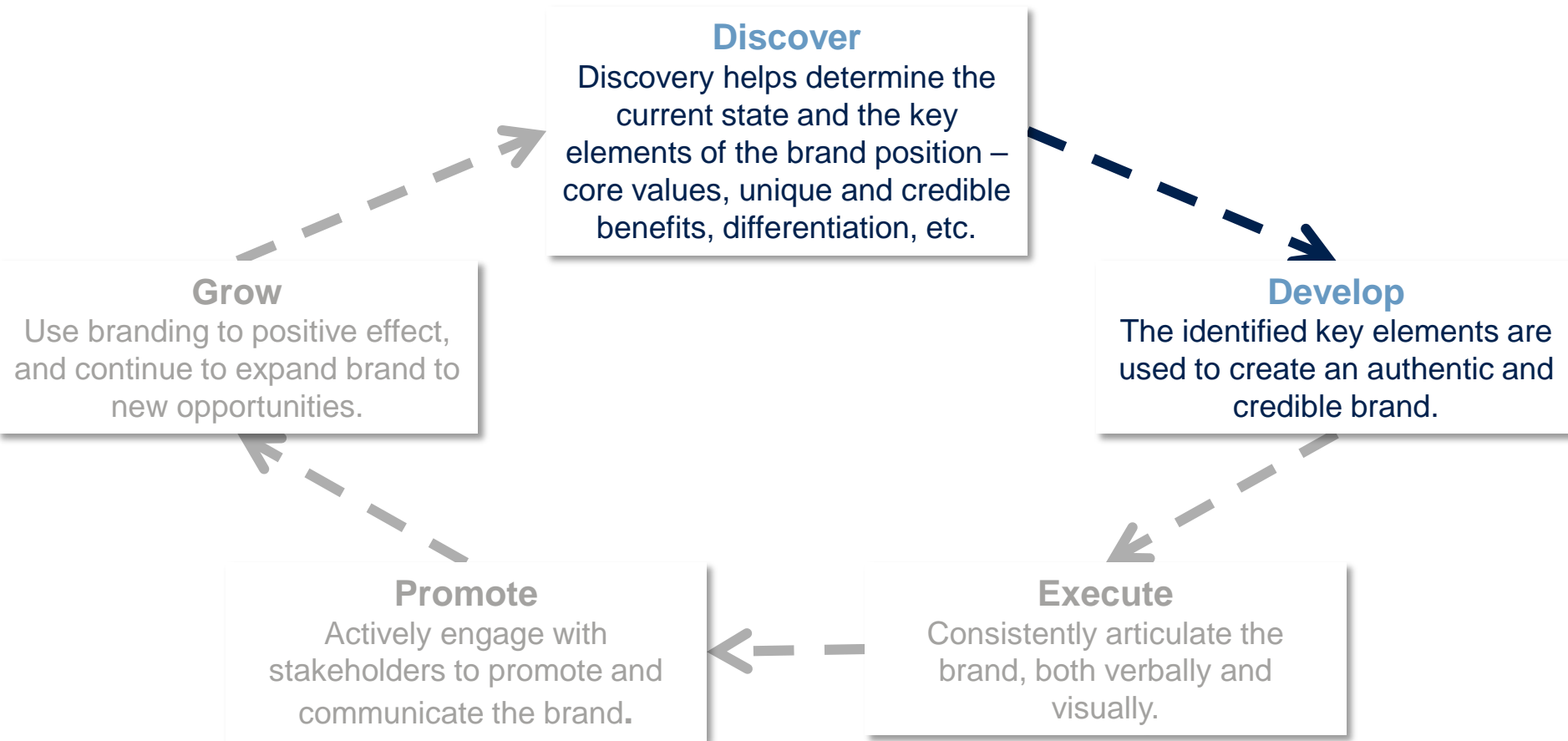
We envision a five-stage brand development process: Discover, Develop, Execute, Promote, and Grow

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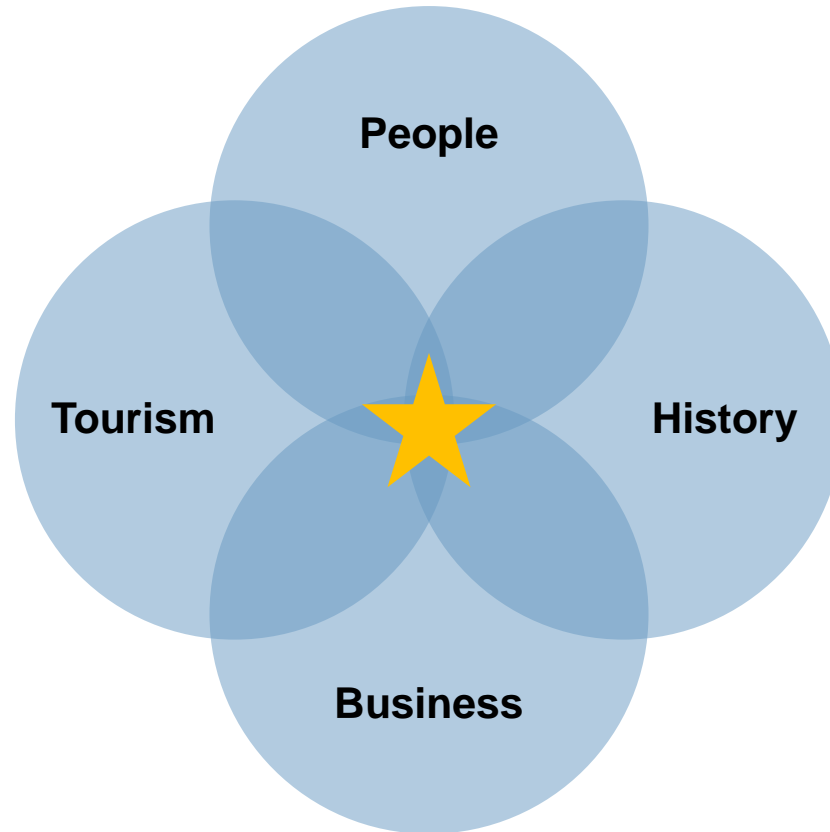
Our project has focused on executing the first two stages, and providing the tools for you to execute the following three stages

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Discovery started with four key areas of focus for identifying the key brand elements: People, History, Business, and Tourism

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The brand is built on the themes and elements identified in the intersections of the focus areas.

Major themes across our focus areas include: Education, Innovation, Hospitality, and Natural Beauty

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People

Hospitality

Educated

Quality of Life



History

Education

Innovation

Pride



Tourism

Natural Beauty

Relaxing

Diverse



Business

Transitioning

Workforce

Innovation



The State Motto was also identified as a potential foundation of the North Carolina brand

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Esse quam videri

(To be, rather than to seem)

- Strong historical support
- Credible and unique
- Can serve as a guidepost

Key Questions:

- Awareness?
- Understanding?
- Resonance?



We developed four potential brand promises to execute on these themes, and tested them with a national survey

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Themes Based

1
Innovate, educate, and cultivate
with Southern charm.

2
Southern Innovation. Beautiful
Destinations. Charming People.

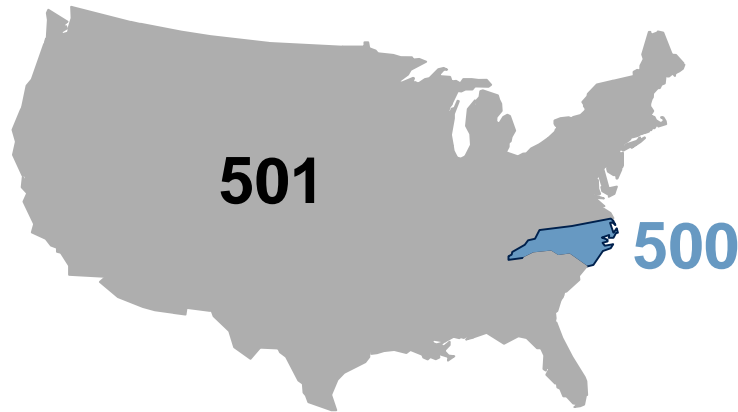
State Motto Based

3
Delivering loud results with quiet
confidence.

4
The promise of genuine
opportunity.

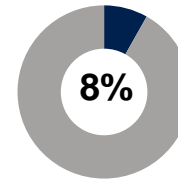
We surveyed 1,001 respondents, divided between NC Residents and Non-Residents, using a nationwide research panel

Base Sizes

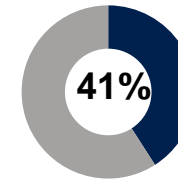


NC Experience

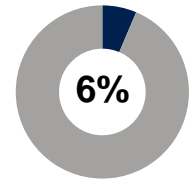
Lived in NC



Traveled to NC

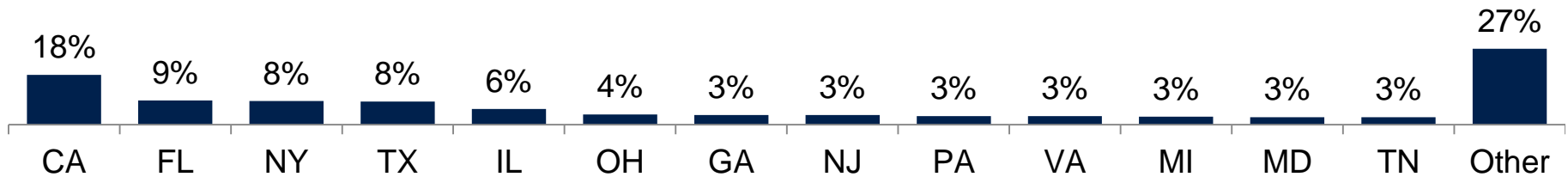


Worked in NC



National Respondents

Non-NC State Representation



Source: Primary Research

The themes-based concepts scored better on key metrics, with the 2nd concept scoring directionally higher than the first

Key Metrics

	NC Residents			Non-NC Residents		
	Authentic	Appealing	Unique	Authentic	Appealing	Unique
1 Innovate, educate, and cultivate with Southern charm.	3.8	3.8	3.6	3.5	3.5	3.4
2 Southern Innovation. Beautiful Destinations. Charming People.	4.1	4.1	3.8	3.7	3.7	3.5
3 Delivering loud results with quiet confidence.	3.3	3.1	3.4	3.2	3.1	3.3
4 The promise of genuine opportunity.	3.5	3.6	3.2	3.4	3.5	3.3



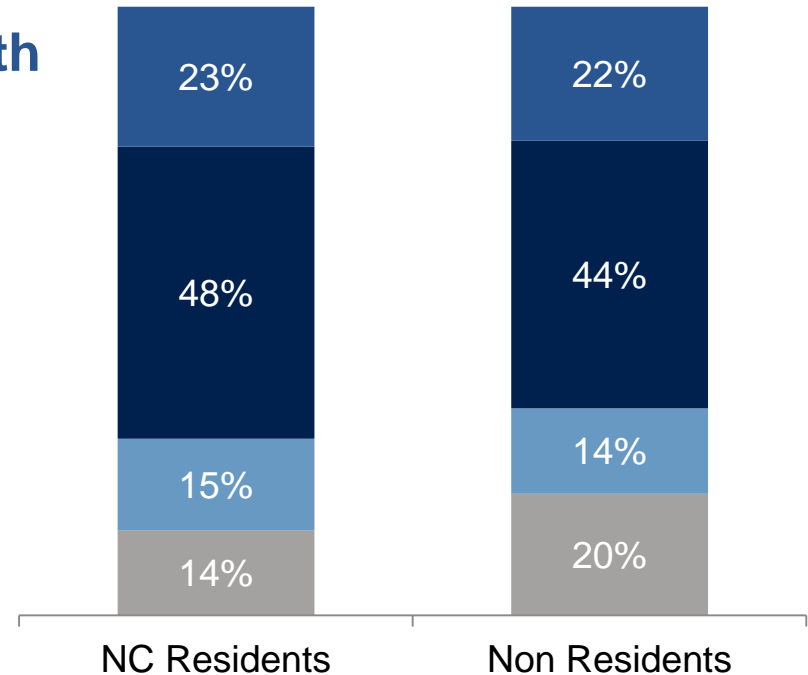
Source: Primary Research

The 2nd promise was deemed the best fit for North Carolina by the largest proportion of both NC residents and non-residents

Fit with North Carolina

Which of these brand promises do you believe is the best fit for the state of North Carolina?

- 1 Innovate, educate, and cultivate with Southern charm.
- 2 **Southern Innovation.**
Beautiful Destinations.
Charming People.
- 3 Delivering loud results with quiet confidence.
- 4 The promise of genuine opportunity.



Source: Primary Research

Unaided awareness of the motto is low, and, even on an aided basis, a third of North Carolinians misidentify/don't know the motto

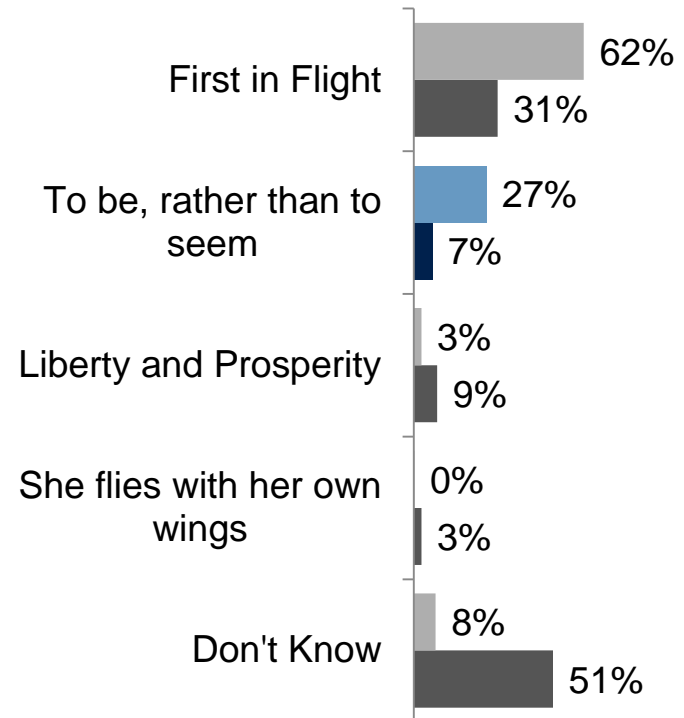
Unaided Awareness

- **21% of NC-Residents correctly identified the state motto** on an unaided basis, with 63% indicating that they “don’t know.”
- Only **3% of Non-Residents correctly identified the state motto**, vs. 7% who believe “*First in Flight*” is North Carolina’s motto.

Aided Awareness

Which of these is the North Carolina state motto?

■ NC Residents ■ Non-Residents



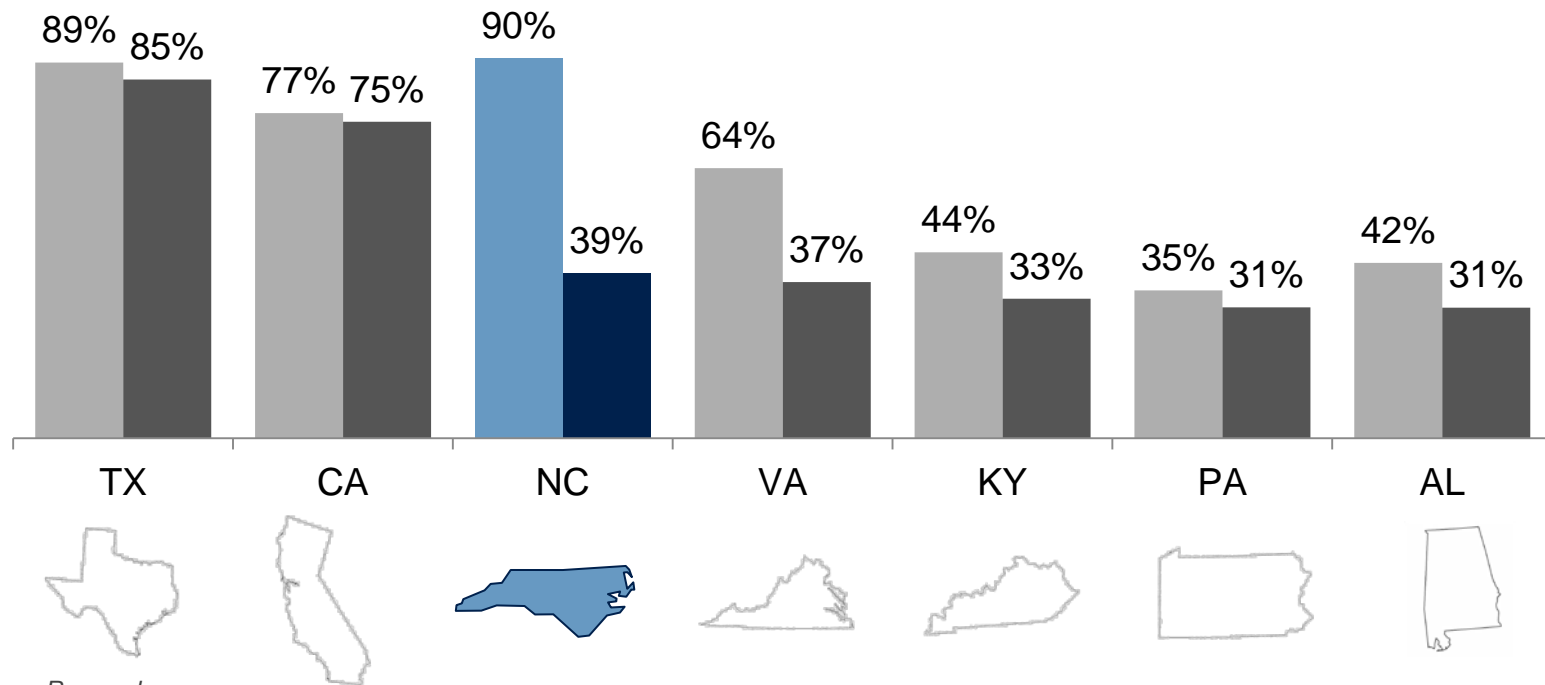
Source: Primary Research

Recognition of the state outline is strong for residents, but not “best-in-class” among non-residents

State Outline Recognition

What state is this?
(Correct Identification)

■ NC Residents ■ Non-Residents



Source: Primary Research

OUR BRAND RECOMMENDATION

**Communicating North Carolina's Value
Proposition**

NORTH CAROLINA



Southern Innovation. Beautiful Destinations. Charming People.



“Southern Innovation. Beautiful Destinations. Charming People.” is an authentic and credible brand for North Carolina

The new brand promise for the state of North Carolina will be a statement guaranteeing to deliver the following:



Southern Innovation.

Tradition of innovative firsts and new initiatives that is still flourishing



Beautiful Destinations.

Scenic mountains and relaxing beaches for all to enjoy



Charming People.

Provides homegrown hospitality and a friendly charm

Selected as the best fit by both in-state and out-of-state respondents more than twice as often as the runner-up.



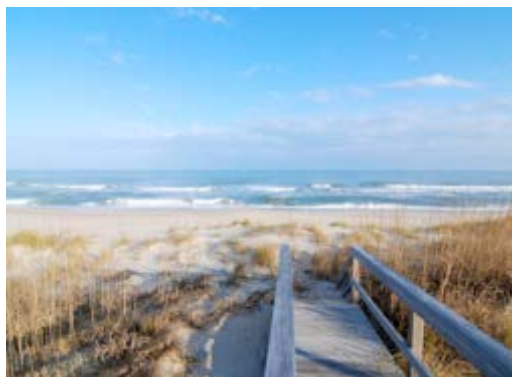
The new brand serves as a guarantee to stakeholders of what North Carolina will consistently deliver

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BUSINESS

An educated labor force, range of growing industries and homegrown ingenuity provides businesses with opportunities to thrive.



TOURISM

NC is home to a variety of tourist attractions ranging from scenic mountains, to relaxing beaches to historic sights.



CITIZENS

In and out-of-state residents benefit from the state's balanced lifestyle and friendly nature of the personality.



Southern Innovation.

North Carolina's history of innovative **firsts** in the sciences, education and business continues to this day, as it promises cutting-edge **opportunities** in a variety of industries and **for all citizens.**



**Leading the way
in education with
the first state
university.**



**Changing the world by being
the first in flight.**

**Innovating the arts with the
first official state symphony.**



**Creating a better
life for North
Carolinians and
the world in
Research
Triangle Park.**



Leading **research universities** delivering new innovations.





Improving education as the nation's pioneer for the early college system.



**Businesses leading the way by
investing in the future.**



Beautiful Destinations.

From the breathtaking **mountains** to the sloping shores of the **beaches**, and from **historic towns** to modern **cultural hubs**, North Carolina provides a variety of places to **explore** and **enjoy**.

From the Blue Ridge Mountains...





**...through the
Piedmont...**

**...to the Outer
Banks.**





**North Carolina has thriving
cities...**

... and endearing **small towns.**



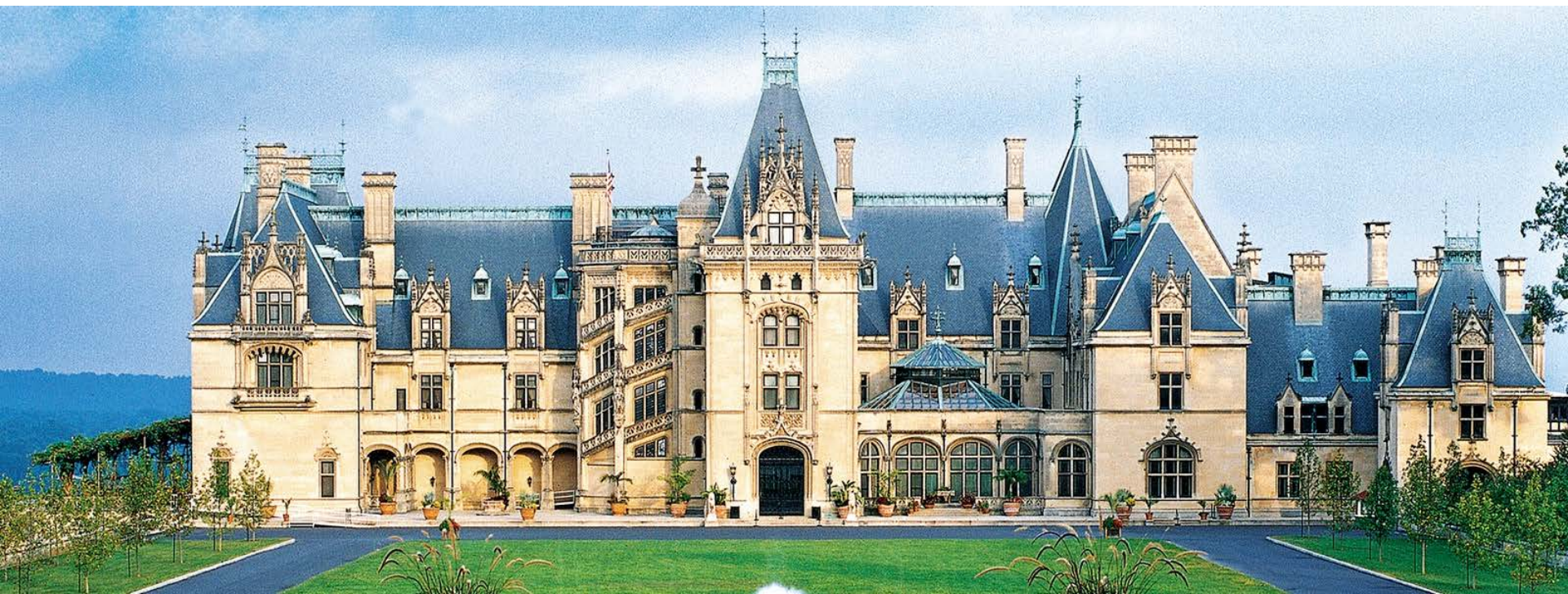
Experience world-class **golf
courses.**





**Indulge your
appetite with
world-
renowned
Southern
Comfort Food.**

**Enjoy the view from America's
largest private residence.**



**Experience
college
basketball's
best rivalry
from center
court.**





**Enjoy a craft beer from one of
North Carolina's 100
breweries.**



Charming People.

North Carolina is the proud home of a **diverse** population.
Both multi-generational North Carolinians and new residents retain the
historic **friendliness, hospitality** and Southern charm that has long
characterized this **welcoming** state.

**North Carolina has one of
the country's most
increasingly diverse
populations.**



**Positive and welcoming attitudes
toward businesses.**





**People who are eager to invite
you to relax and escape.**



**A historic
tradition of
friendly local
citizens.**



A place where **southern
hospitality is a way of life, and
every visitor can feel at home.**

**A state
characterized
by people who
enjoy
balanced
lives.**





**People who
are proud to
call North
Carolina
home.**

BRAND LOGO EXPLANATION

**A Look at the Different Symbols and Their
Significance to North Carolina**






The logo is made up of 15 symbols that best represent the core themes embodied in our brand promise

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Each symbol represents a unique aspect of North Carolina's history and values

60

	First in Flight	The Wright brother's plane represents the popular NC license plate slogan " First in Flight. "
	Basketball	Home to college basketball's best rivalry, the basketball represents NC's rich basketball history.
	BBQ	Part of NC's history and heritage, the grill represents NC's unofficial food dish, BBQ.
	NASCAR	The checkered flag represents N NASCAR.
	Golf	Home to over 400+ courses, including the host of this year's US Open, the golf club and ball represents one of NC's most popular recreational activities, golf.

Each symbol represents a unique aspect of North Carolina's history and values (continued)

61

	Research Triangle Park	The triangle represents NC's Research Triangle Park , which is home to more than 170 global companies.
	Biotech & Pharma	The pill represents NC's reputation as a global epicenter of biotechnology and pharmaceutical companies.
	Education	With top colleges and home to the first state university, the pantheon represents NC's reputation as a leader in education .
	Research	Home to the leading R&D firms and top research universities, the microscope represents NC's focus on cutting-edge research .
	Innovation	Fostering a culture of scientific advancement and competitive excellence, the lightbulb represents NC's focus and reputation for innovation .

Each symbol represents a unique aspect of North Carolina's history and values (continued)

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Lighthouse

The lighthouse represents one of NC's most iconic symbols, the **Lighthouses** across the Outer Banks.



Agriculture

The leading industry in NC, **agriculture**, is represented by a leaf.



Southern Hospitality

The shaking hands represents **southern hospitality**, a way of life in NC, where every visitor can feel like they're home.



Beaches

With more than 300 miles of coastline, charming small towns, the rolling valleys, and the most popular tourist attraction, the



Mountains

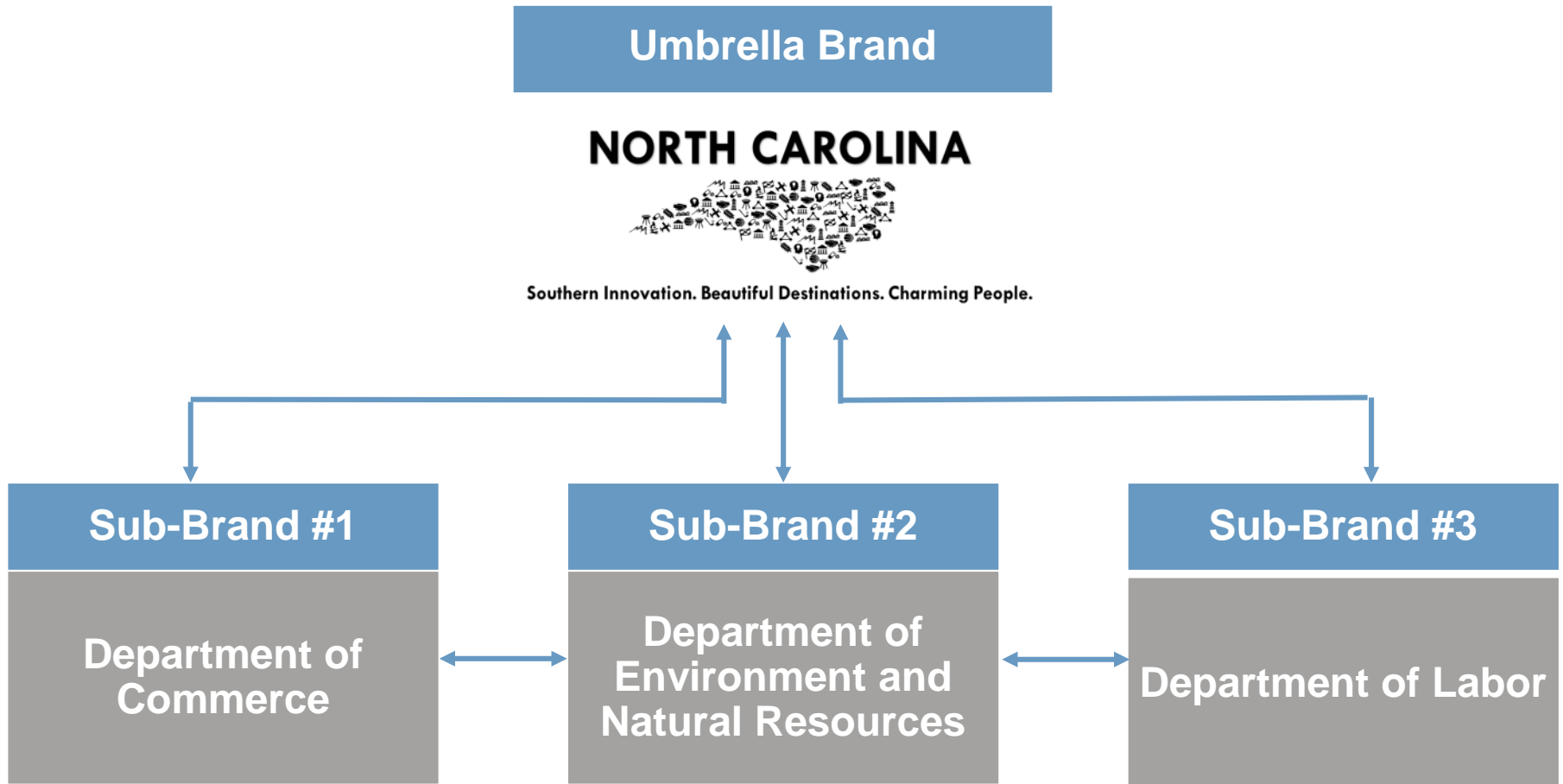
The soaring peaks represent the beauty and tranquility of the fertile valleys, rushing streams, and rich forests that can be found in NC's **mountains**.

EXECUTING THE BRAND

**Recommendations for Brand Architecture
and Implementation**

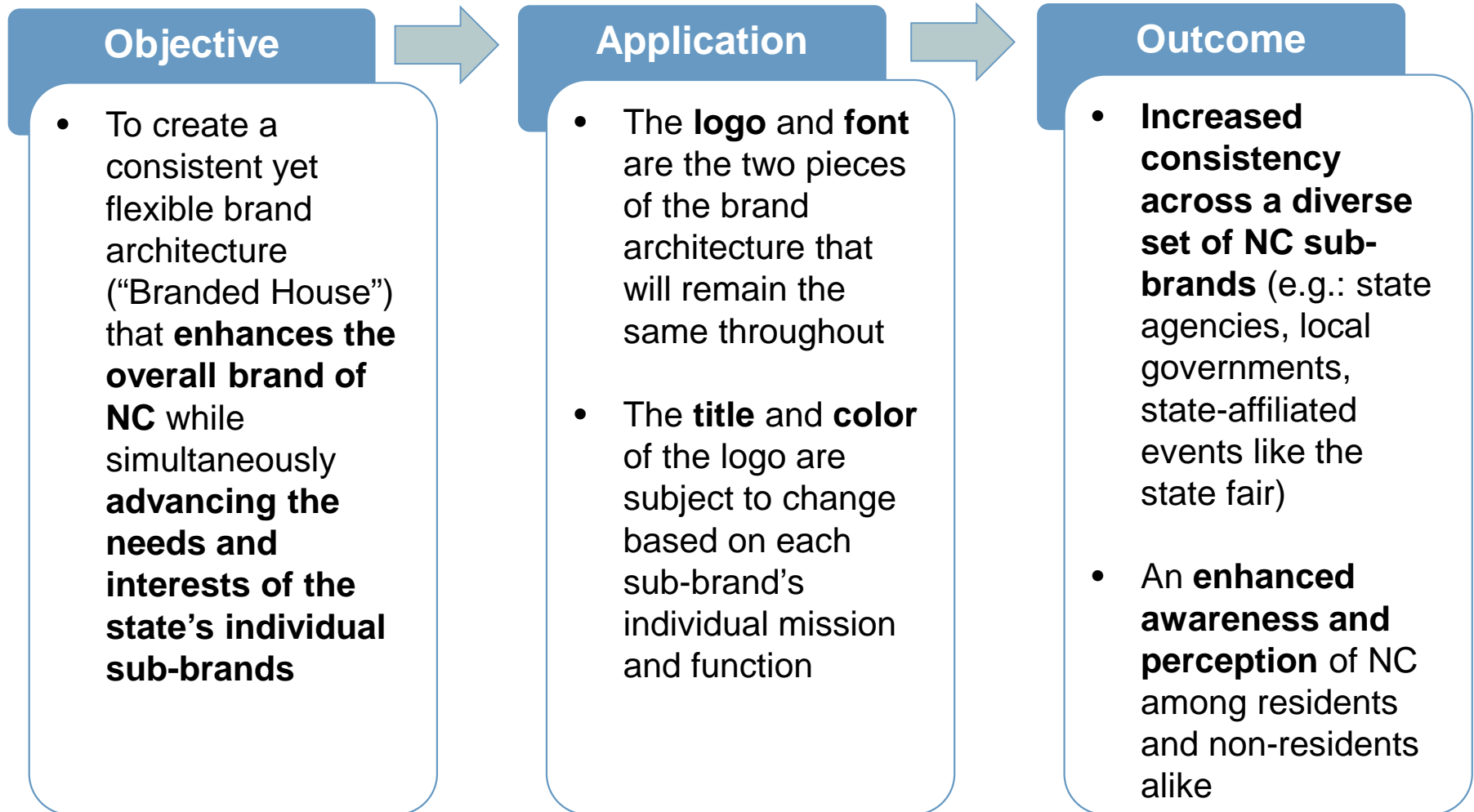
The most effective brand architectures are mutualistic in nature—the umbrella brand imparts value on each sub-brand and vice versa

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Our architecture achieves this goal by preserving certain elements of the umbrella brand while altering others to meet individual needs

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Our brand architecture seeks to maintain a level of consistency while also providing flexibility for individual adaptation

Brand Architecture Comparison

PURE MICHIGAN[®]
Business Connect

PURE MICHIGAN[®]
Talent Connect

PURE MICHIGAN[®]
Energy Office

PURE MICHIGAN[®]
Shifting Gears

PURE MICHIGAN[®]
Shifting Code

Our Brand Architecture

NORTH CAROLINA



DEPARTMENT OF COMMERCE

NORTH CAROLINA



**DEPARTMENT OF ENVIRONMENT
& NATURAL RESOURCES**

NORTH CAROLINA



DEPARTMENT OF LABOR

A sub-brand's color scheme can be altered to enhance its appeal to key stakeholders from an emotional/psychological standpoint

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Color Meaning

Blue is commonly associated with “productivity”. It also exudes a sense of security and trust.

Green is commonly connected with the environment, Mother Nature, and fertility.

Red denotes a commitment to safety as well as passion and intensity.

Source: Fast Company

Our Brand Architecture

NORTH CAROLINA



DEPARTMENT OF COMMERCE

NORTH CAROLINA



DEPARTMENT OF ENVIRONMENT
& NATURAL RESOURCES

NORTH CAROLINA



DEPARTMENT OF LABOR

SUMMARY

A rundown of our approach and our final recommendation

We established the rationale for rebranding North Carolina

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- Why rebrand North Carolina?

We examined state rebranding campaigns in CO, KY, MI, and VA and determined that there was a business case for rebranding NC

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- Why rebrand North Carolina?


- Best practices

We conducted secondary research, investigating four focus areas that best represented the state as well as the state motto

71



- Why rebrand North Carolina?



- Best practices



- Secondary research

We developed four brand promises, two modeled off four common themes that we identified and two modeled off the state motto

72



- Why rebrand North Carolina?



- Best practices



- Secondary research



- Brand promises

We tested the four brand promises using a panel survey consisting of five hundred in-state and five hundred out-of-state residents

73

- Why rebrand North Carolina?

- Best practices

- Secondary research

- Brand promises

- Primary research

Based off our primary research, we deemed “Southern Innovation. Beautiful Destinations. Charming People.” to be the best fit

74



- Why rebrand North Carolina?



- Best practices



- Secondary research



- Brand promises



- Primary research



- Our recommendation

We created the concept for an icon-based brand architecture that best represented our recommended brand promise

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- Why rebrand North Carolina?

- Best practices

- Secondary research

- Brand promises

- Primary research

- Our recommendation

- Brand architecture

“Southern Innovation. Beautiful Destinations. Charming People.” is an authentic and credible brand for North Carolina

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The new brand promise for the state of North Carolina will be a statement guaranteeing to deliver the following:



Southern Innovation.

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Beautiful Destinations.

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Charming People.

Provides homegrown hospitality and a friendly charm

PROJECT CONTACTS

The “Born and Bred” STAR Team

The “Born & Bred” Star Team

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APPENDIX

All of the details...

FOCUS AREA THEMES

Identifying the Elements of NC's brand

Evaluating the people of North Carolina suggests themes of: hospitality, education, and high quality of life

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PEOPLE



Hospitality

NC's people have a reputation for being welcoming and friendly



Educated

NC's people are a product of the state's strong education programs



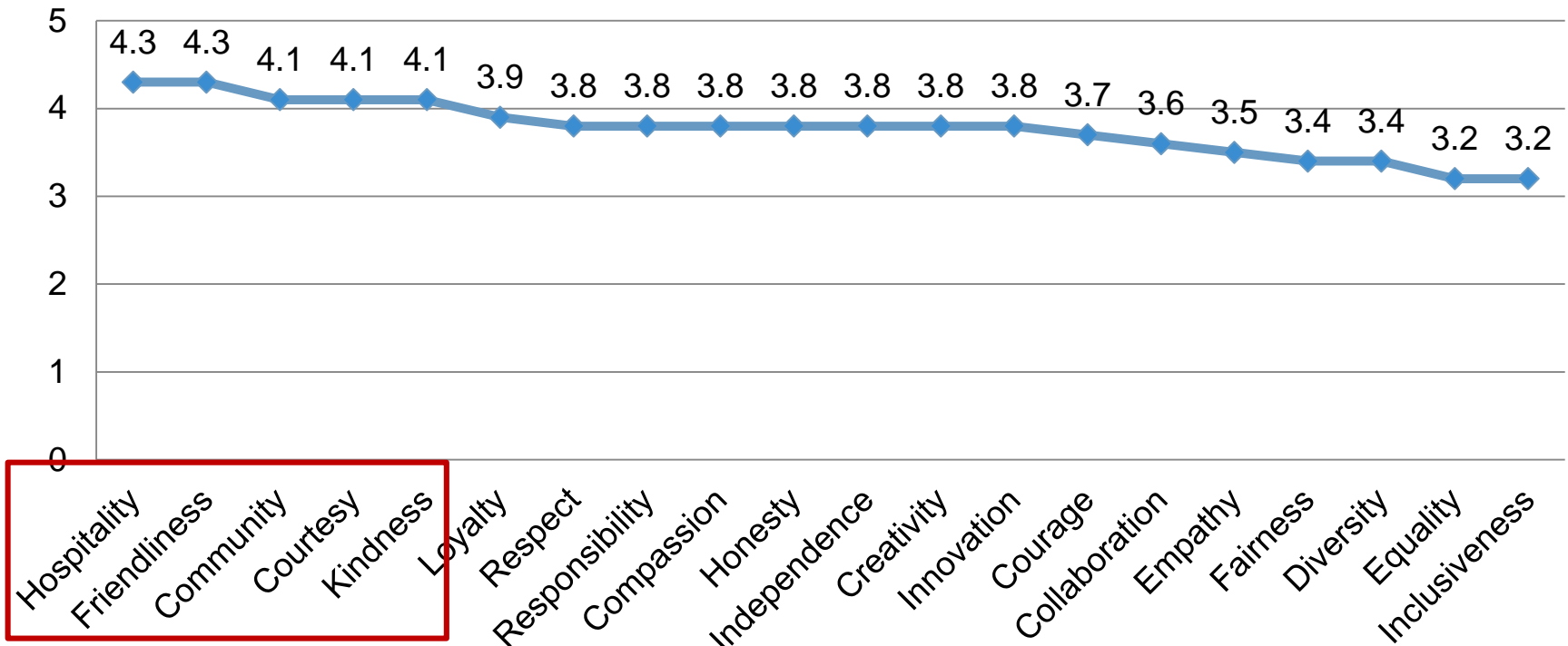
Quality of Life

NC's people lead healthy, balanced lives

North Carolinians are known for their “friendliness”, “hospitality”, “community”, “courtesy”, and “kindness”

Findings from The Brand North Carolina Project

NC's Core Values (5-Strongly Agree to 0-Strongly Disagree)



Source: Enduring Core Values Survey

North Carolina's education system is attractive to new and old residents alike

83

Pre-Kindergarten



NC ranks among the top 4 states nationally for state pre-kindergarten quality standards

K-12 System



NC is the #1 state for National Board Certified teachers

NC's average SAT score exceeds the Southeast's average score

Higher Education



NC's community college system has 58 campuses within a 30-minute commute of 99% of the state's population

The UNC system is one of the least expensive in the nation

North Carolina's high quality of life lends itself to a satisfied population that will stay and give back to the state

84

Moderate Climate



Rich Culture



Sports Legacy



Quality Health Care



Low Costs



Recreation



North Carolina has a strong history of education, innovation and state pride

85

HISTORY



Education

Success in higher education and modern education system improvements



Innovation

Home for new businesses and innovative technology and ideas



Pride

Tradition of pride in doing what is right and taking a stand

North Carolina has historical success in higher education and leads nationwide initiatives in modern education system improvements

86

Examples of Educational Success in North Carolina

■ HIGHER EDUCATION



The number of influential universities and leaders that these schools have produced distinguishes NC from other states.

■ EARLY COLLEGE SYSTEM



North Carolina has become a nationwide leader with its innovative and highly successful implementation of early colleges.

In recent history North Carolina has made national news with its successful implementation of the early college system

87

WHAT?

Aim to graduate students with a high school degree and two years of transferrable college credit at no cost to their families.

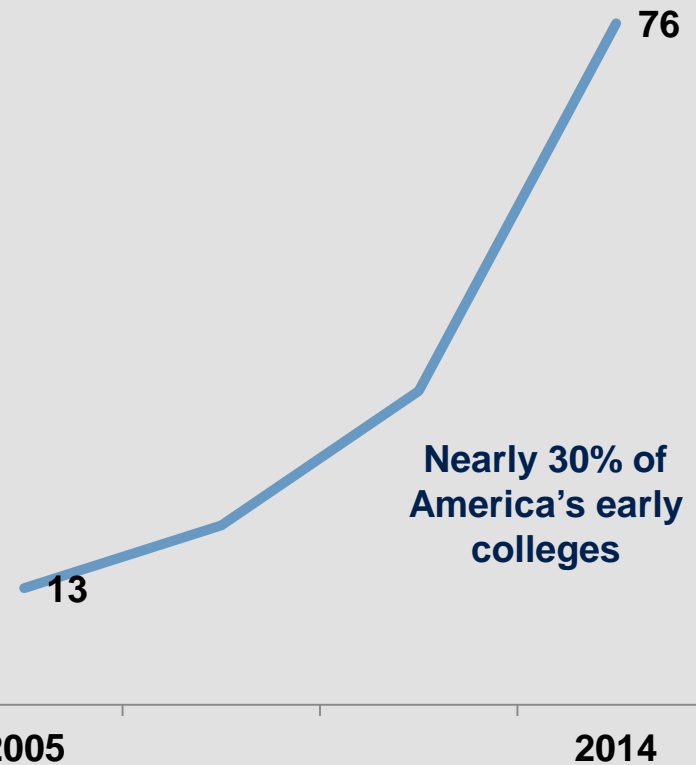
WHERE?

Two to four year university campuses located throughout the state of North Carolina

SUCCESS?

Higher graduation rates, decreased dropout and increased college matriculation

Growth of Early Colleges in North Carolina

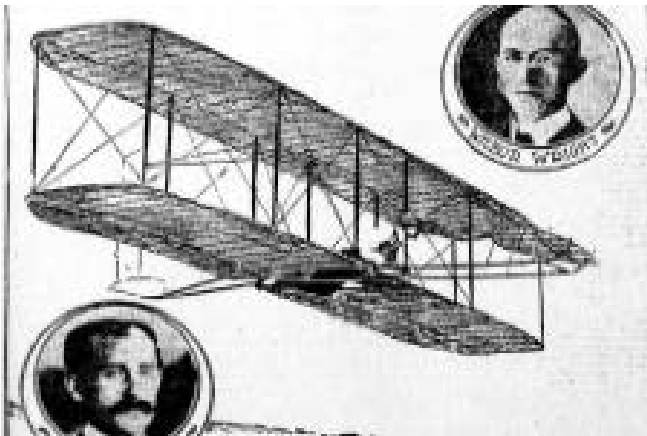


North Carolina is the birthplace of many innovative global corporations, technological discoveries and pioneering milestones

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Examples of Innovation in North Carolina

■ DISCOVERIES AND PROGRESS



Significant inventions and innovative technology makes North Carolina's historical timeline unique from that of neighbor states.

■ BIRTHPLACE OF BUSINESS

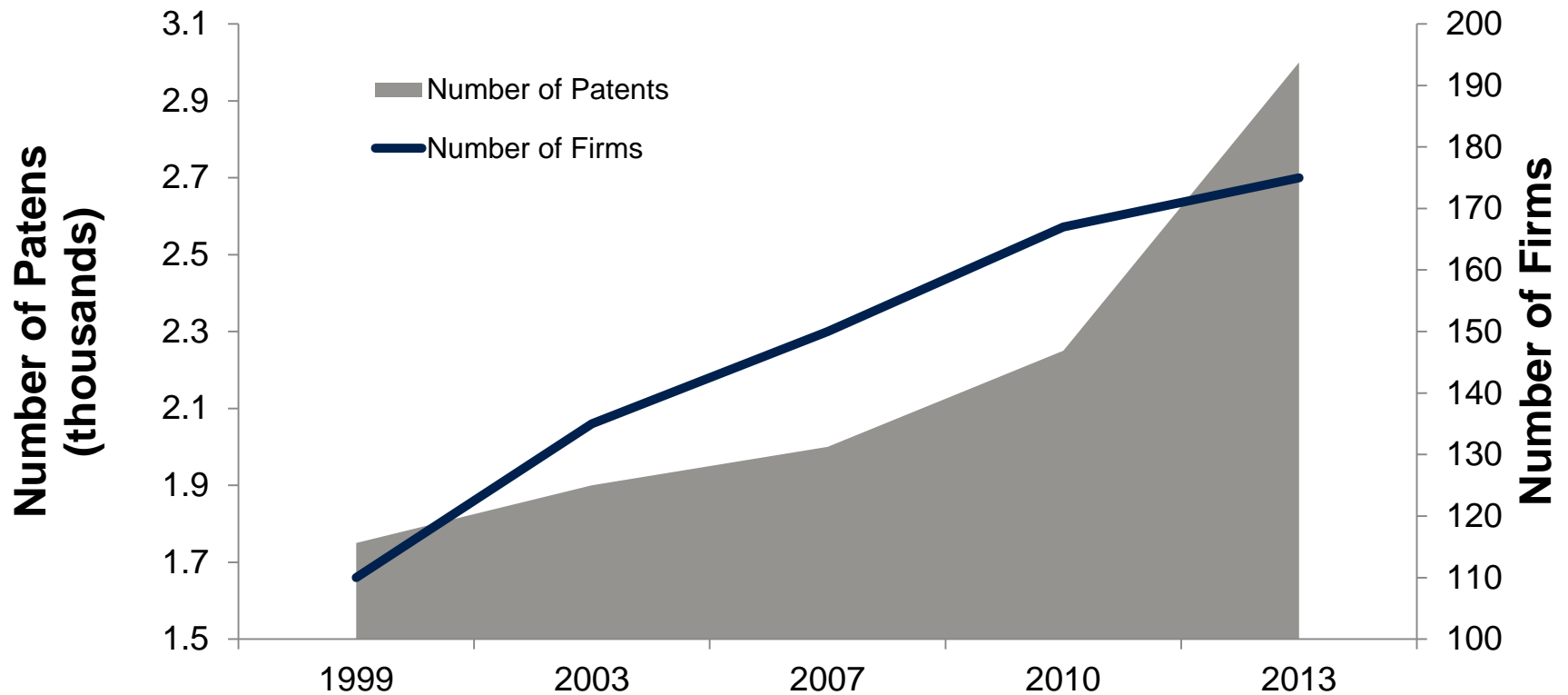


Countless businesses and corporations call North Carolina both their place of origin and modern headquarters.

Since 1959, Research Triangle Park has galvanized the growth and success of innovation in North Carolina on a national scale

Research Triangle Park Driving Innovation

Growth of Firms and Patents at RTP



In political, military and cultural history NC is a vanguard state which takes pride in standing by its beliefs and core values

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Examples of Pride in North Carolina

■ MILITARY AND POLITICAL HISTORY



North Carolina has a tradition of loyally adhering to honest values and standing strong by its actions.

■ CULTURAL HISTORY



NC's rich cultural history shows its determination to remain a welcoming place and to fight whenever this value is challenged.

North Carolina's rich cultural heritage contains many examples of state pride and forward-thinking "firsts"

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Southern Hospitality

Tradition of Welcoming People and Friendly Lifestyles



Stand for Civil Rights

Negro Voters League in Raleigh

Supporter of the Arts

First State Museum of Art in Raleigh



First State Symphony Orchestra

Founded in 1943

Capitalize on North Carolina's productive labor force to generate innovative concepts and support a diverse economy

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BUSINESS



Transitioning

North Carolina is undergoing a significant shift in key industries



Workforce

Educated labor and migration provide large and capable workforce



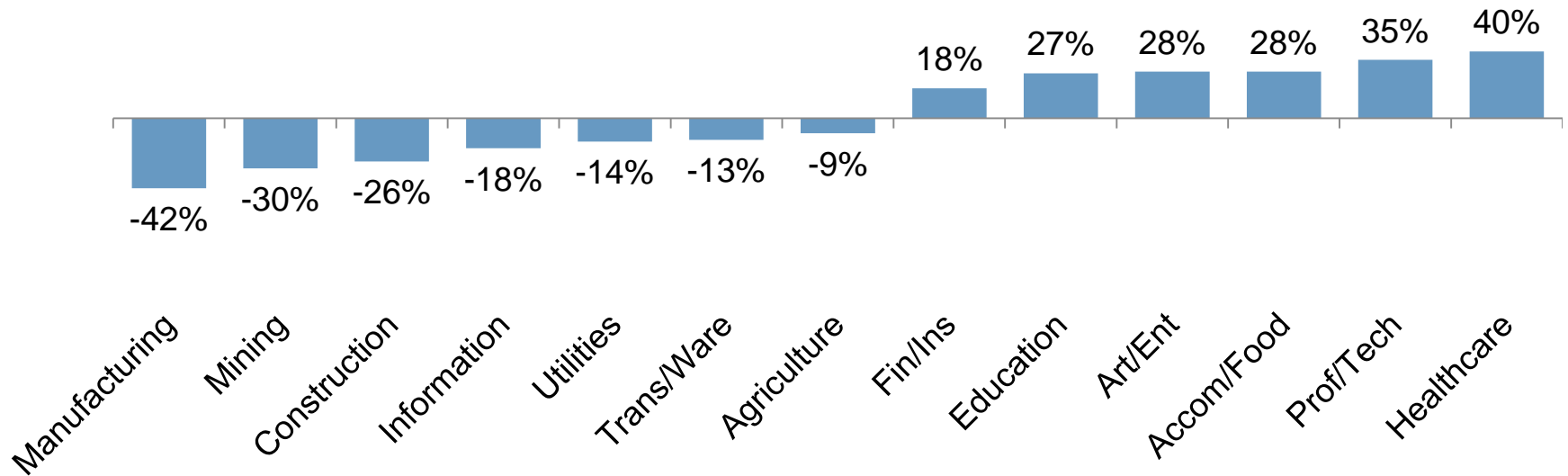
Innovation

Strong foundation for research, technology, and startups near prestigious universities

The business climate in North Carolina has undergone a decade of transition, driving a greater demand for skilled workers

Industry Shifts

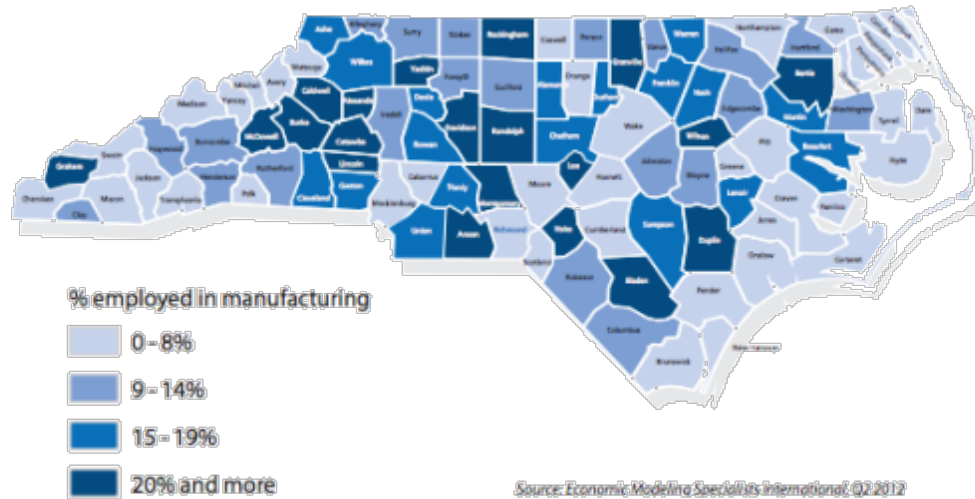
The Changing Face of NC Employment – 2000 to 2012



The growing sectors of employment in the state include financial services, education, and health professions

Source: NC Jobs Plan Report

However, manufacturing firms still play an important role in North Carolina, especially in rural areas



	NC Total	Urban NC	Rural NC
MFG jobs (2012)	438,982	217,206	221,776
MGS as % of total employment	10.9%	8.9%	13.8%
Avg annual MFG wage	\$53,337	\$64,610	\$42,297
Avg annual private wage (excluding MFG)	\$40,425	\$44,826	\$32,458

Source: North Carolina Rural Economic Development Center

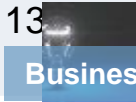
MFG wages relative to private average wages: 133% (Urban NC) and 130% (Rural NC)



People



History



Business



Tourism



The NC education system can serve the growing need for a skilled workforce

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North Carolina is well positioned to meet this need through a strong University system and a robust Community College system.

University System



- **First public university** in United States
- **17 institutions** across the state
- Total enrollment of **220K+**

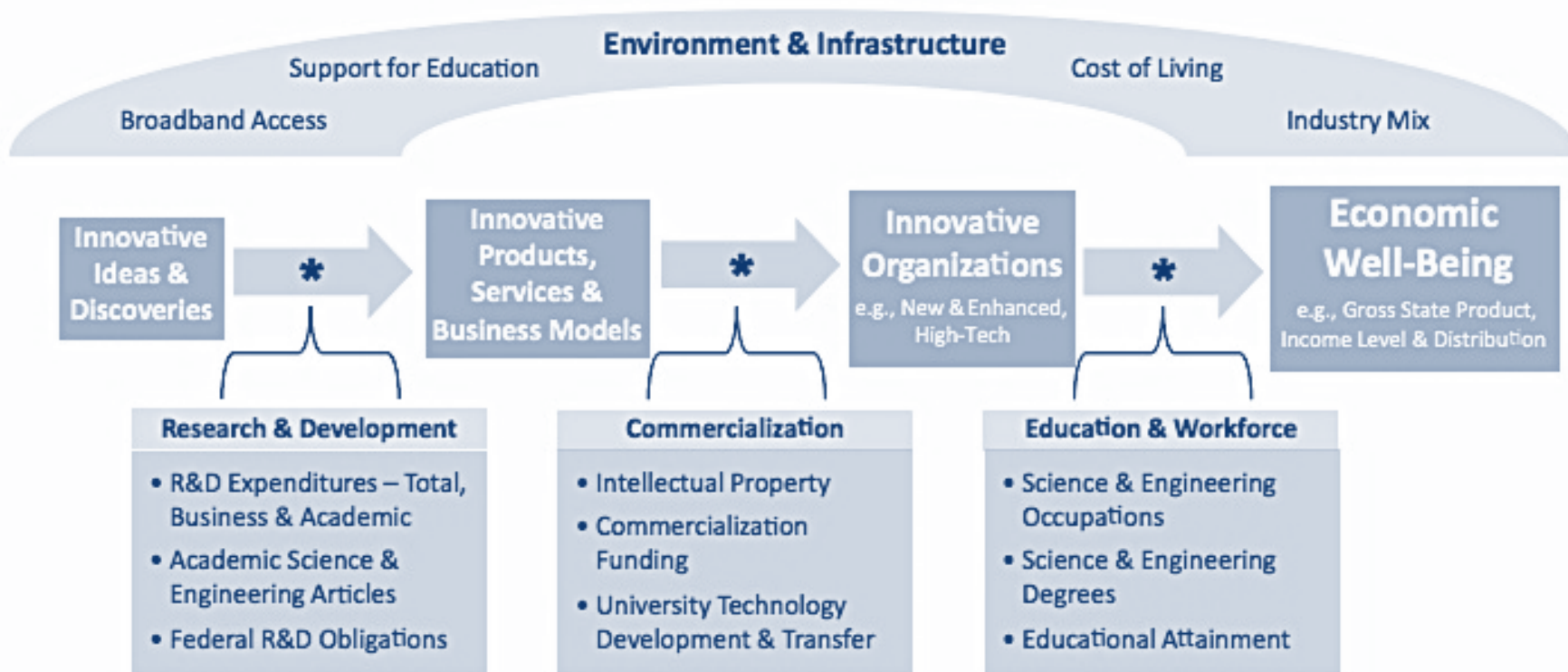
NC Community Colleges



- **3rd largest** community college system nationally
- **5 NC Colleges** in the top-10% of national community colleges
- **840,000 enrolled students** (2010-11)– 1 in 9 citizens 18+
- **30 minutes maximum drive** for citizens to nearest community college

Source: *Creating Success: NC Community Colleges*; NorthCarolina.edu

North Carolina fosters innovation through a unique “Innovative Ecosystem” approach to attract business



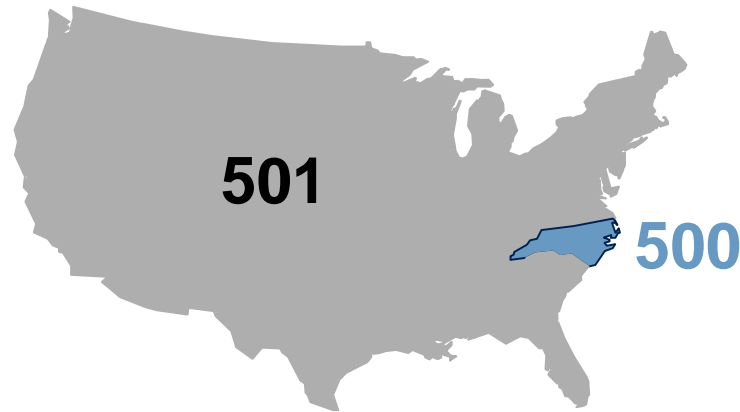
Source: North Carolina Board of Science and Technology

PRIMARY RESEARCH

**Understanding the Market and Evaluating
Potential Brand Promises**

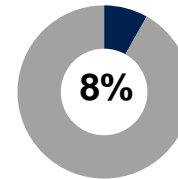
We surveyed 1,001 respondents, divided between NC Residents and Non-Residents, using a nationwide research panel

Base Sizes

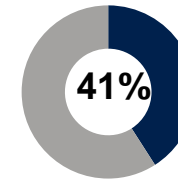


NC Experience

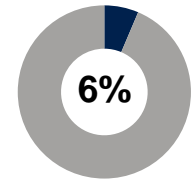
Lived in NC



Traveled to NC

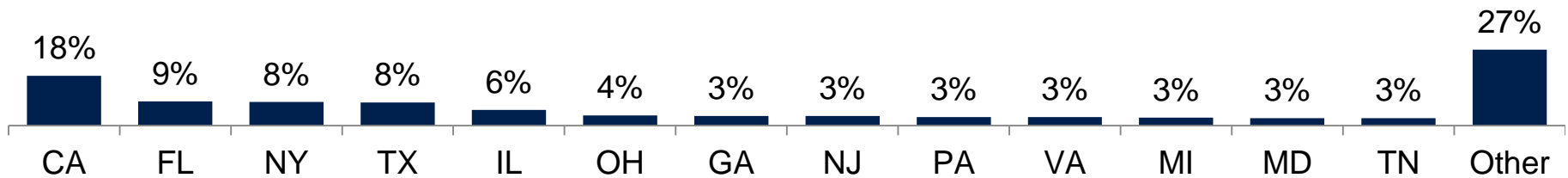


Worked in NC



National Respondents

Non-NC State Representation



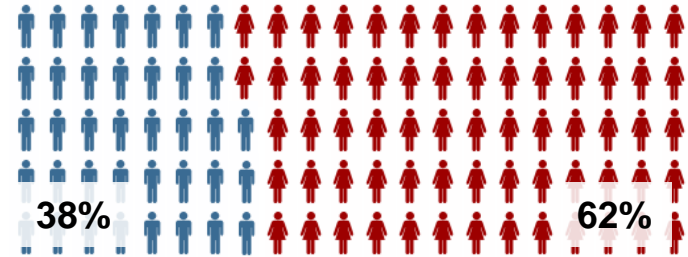
Source: Primary Research

Survey respondents were a fairly representative sample with a skew in favor of female and middle age participants

NC Resident Gender Breakdown

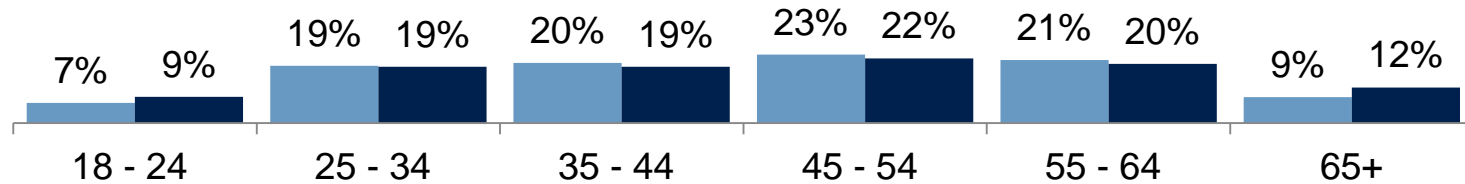


Non-Resident Gender Breakdown



Age

■ NC Residents ■ Non-Residents



BRAND PROMISE SUMMARIES

Brand Promise Feedback

The themes-based concepts scored better on key metrics, with the 2nd concept scoring directionally higher than the first

Key Metrics

	NC Residents			Non-NC Residents		
	Authentic	Appealing	Unique	Authentic	Appealing	Unique
1 Innovate, educate, and cultivate with Southern charm.	3.8	3.8	3.6	3.5	3.5	3.4
2 Southern Innovation. Beautiful Destinations. Charming People.	4.1	4.1	3.8	3.7	3.7	3.5
3 Delivering loud results with quiet confidence.	3.3	3.1	3.4	3.2	3.1	3.3
4 The promise of genuine opportunity.	3.5	3.6	3.2	3.4	3.5	3.3



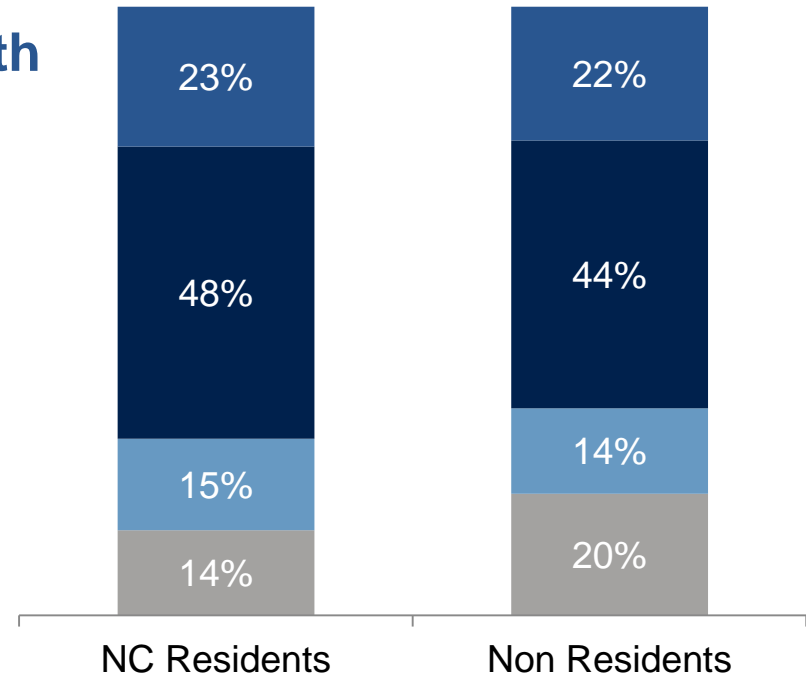
Source: Primary Research

The 2nd concept was deemed the best fit for North Carolina by the largest proportion of both NC residents and non-residents

Fit with North Carolina

Which of these brand promises do you believe is the best fit for the state of North Carolina?

- 1 Innovate, educate, and cultivate with Southern charm.
- 2 **Southern Innovation.**
Beautiful Destinations.
Charming People.
- 3 Delivering loud results with quiet confidence.
- 4 The promise of genuine opportunity.

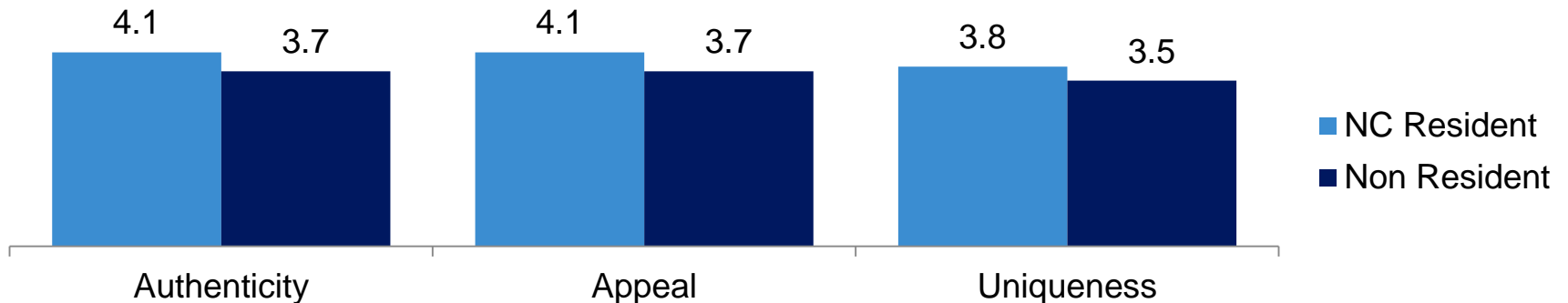


Source: Primary Research

“Southern Innovation. Beautiful Destinations. Charming People” received the highest fit ranking of all brand promises tested

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Authenticity, Appeal, and Uniqueness of Brand Promise



This brand promise was selected as the option which best described North Carolina **45%** of the time by all respondents.

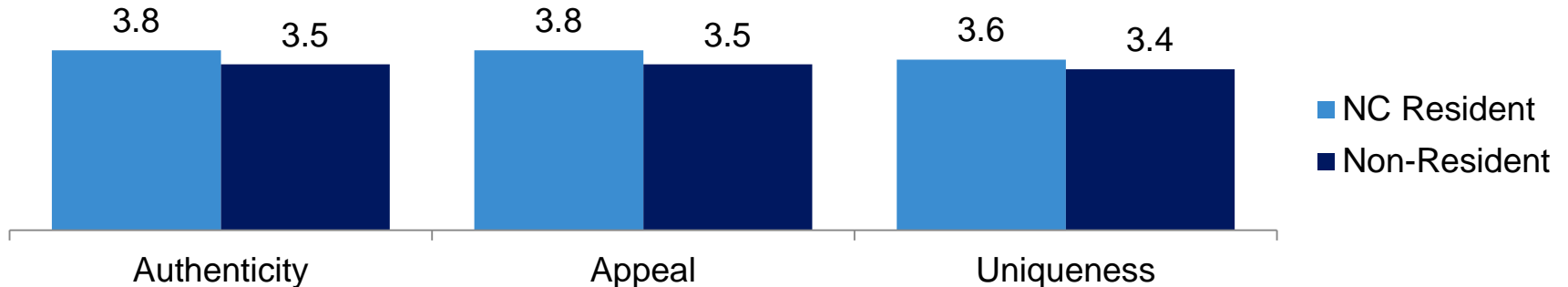
Survey Quotes

- “Our smiles have a special meaning behind it”*
- “Many interesting things and places to explore with the friendliness of the South”*
- “Our state is beautiful from one end to the other and our people are like no other. Love this!”*

Reactions to “Innovate, educate, and cultivate with Southern charm” show positive feedback for core values of the state

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Authenticity, Appeal, and Uniqueness of Brand Promise



This brand promise was only selected as the option which best described North Carolina 23% of the time by all respondents.

Survey Quotes

“There are opportunities to invent, to learn, to grow in a slower Southern picture”

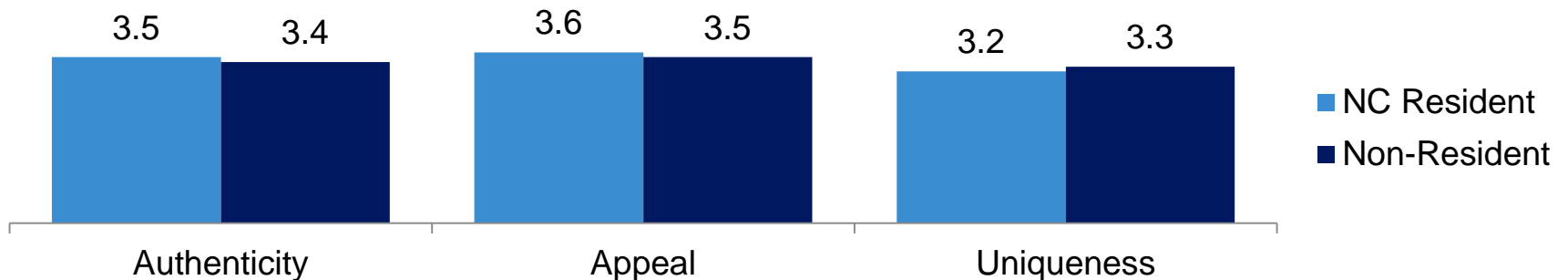
“They want to be a top state”

“I think it would be good to let the rest of the nation know what this state truly represents.”

“The Promise of Genuine Opportunity” is another neutral slogan which did not produce a strong idea or image of the state

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Authenticity, Appeal and Uniqueness of Brand Promise



This brand promise was only selected as the option which best described North Carolina **17%** of the time by all respondents.

Survey Quotes

“I really can’t say what this means, it’s much too general.”

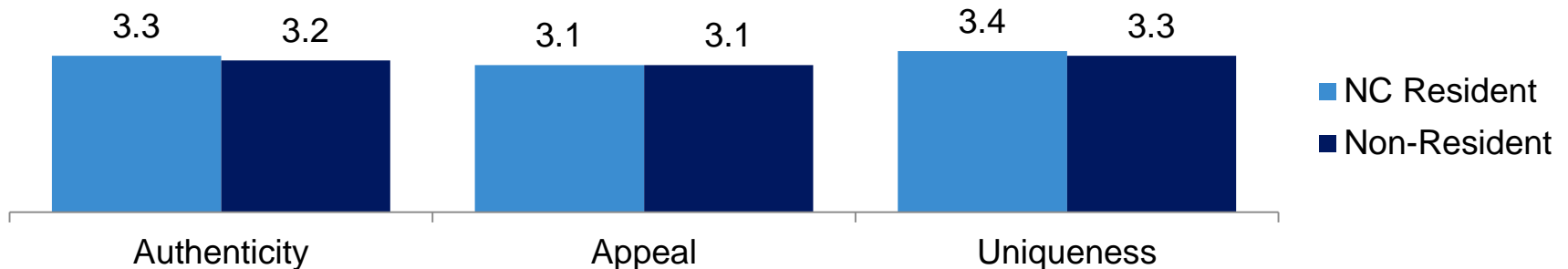
“There are many opportunities in NC?”

“Growth potential, but not too catchy.”

Neutral responses towards “Delivering loud results with quiet confidence” indicate a lack of excitement surrounding this brand

106

Authenticity, Appeal and Uniqueness of Brand Promise



This brand promise was only selected as the option which best described North Carolina 14% of the time by all respondents.

Survey Quotes

“This is almost a conflicting statement.”

“Nothing, really. It isn’t an attractive statement.”

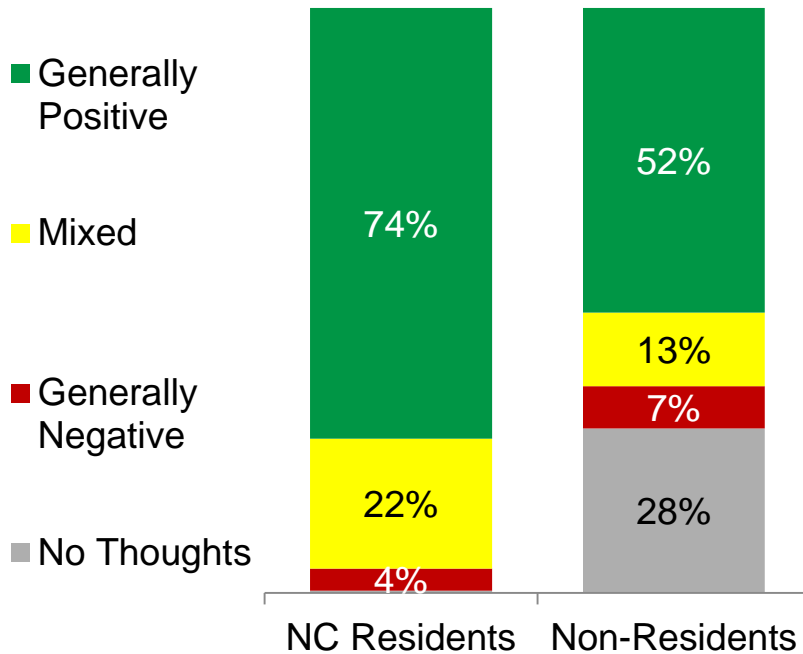
“The word “loud” does not conjure positive thoughts in my mind.”

NC AWARENESS

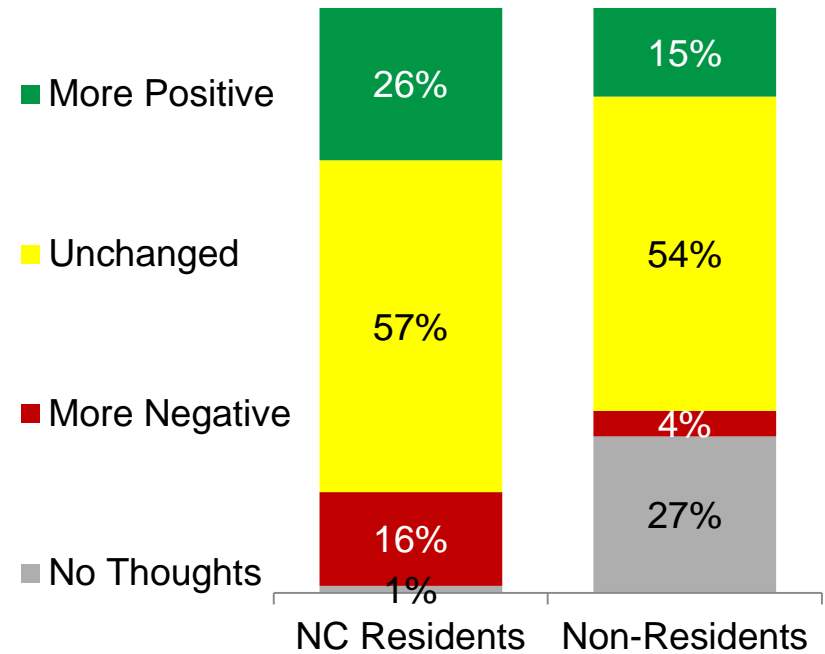
Perceptions, State Motto, State Map

Among residents, perceptions of NC are generally positive

If you have any thoughts about North Carolina, are they generally positive, negative, or mixed?



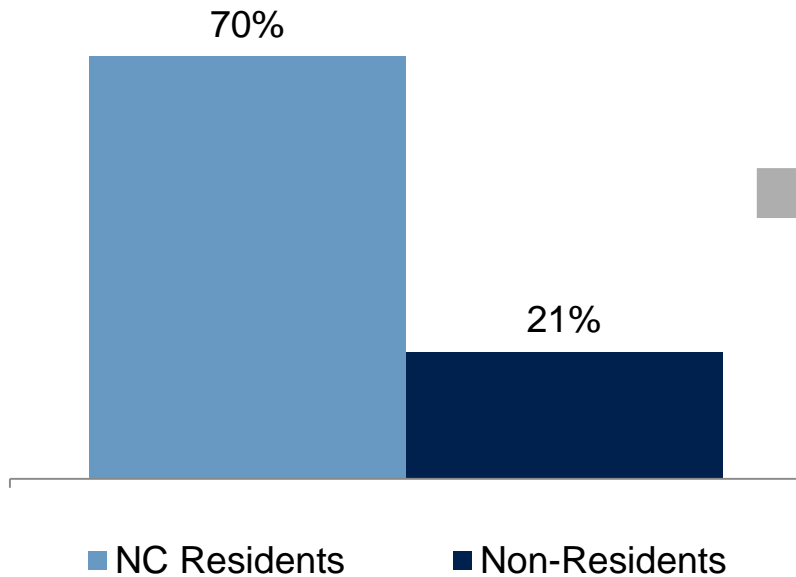
Have your perceptions of North Carolina changed at all in the past six months?



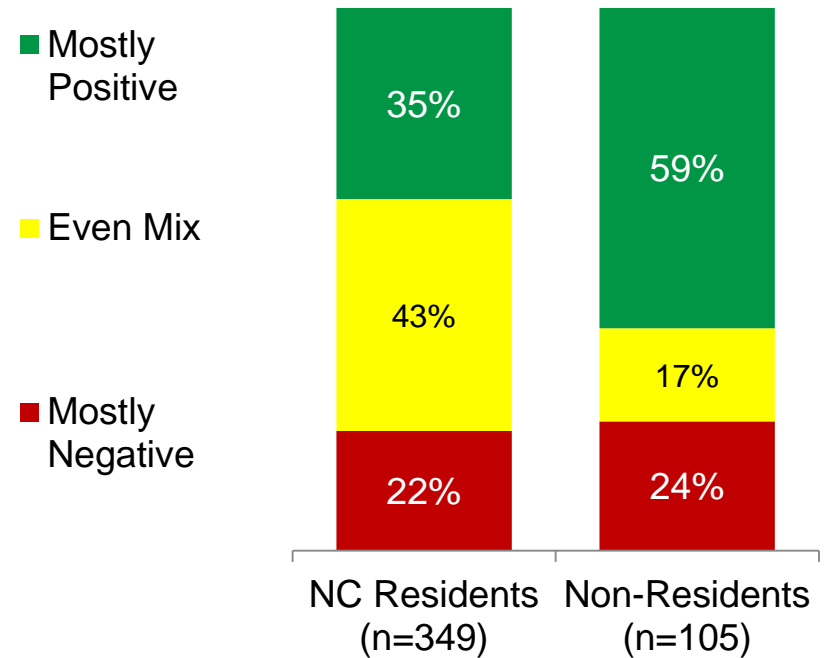
Perception of news stories is not negative, but out-of-state respondents had a significantly lower awareness of North Carolina

109

Have read, heard, and/or seen stories about NC in the news in the past six months



Were the stories mostly positive or mostly negative?



Unaided awareness of the motto is low, and, even on an aided basis, a third of North Carolinians misidentify/don't know the motto

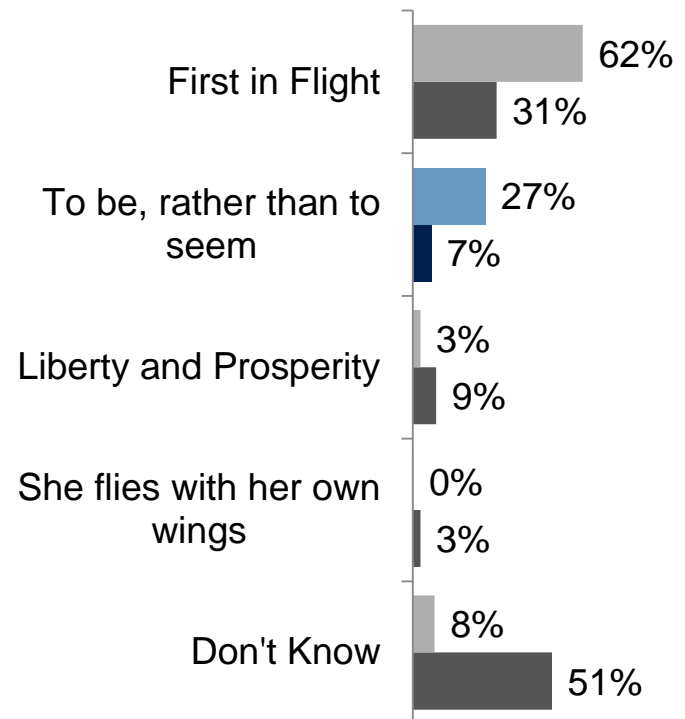
Unaided Awareness

- **21% of NC-Residents correctly identified the state motto** on an unaided basis, with 63% indicating that they “don’t know.”
- Only **3% of Non-Residents correctly identified the state motto**, vs. 7% who believe “*First in Flight*” is North Carolina’s motto.

Aided Awareness

Which of these is the North Carolina state motto?

■ NC Residents ■ Non-Residents



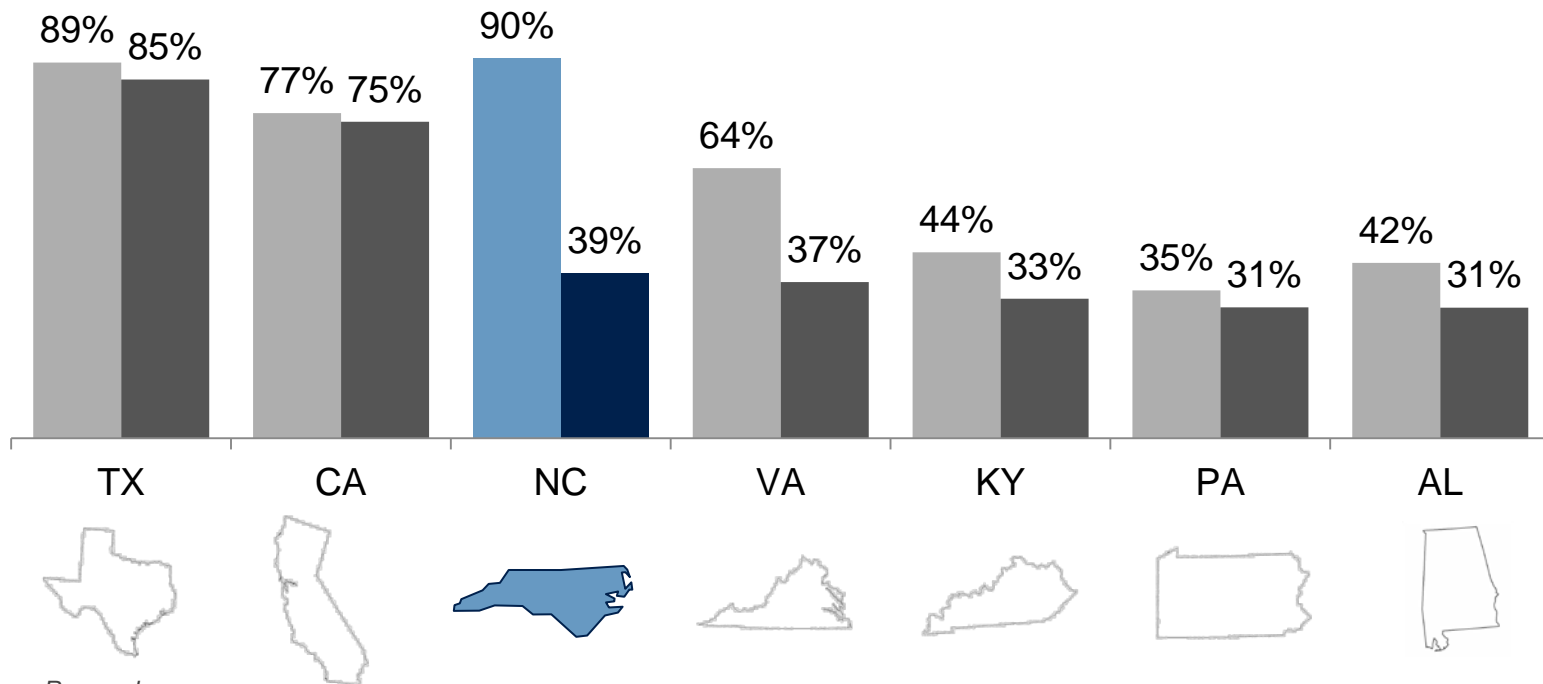
Source: Primary Research

Recognition of the state outline is strong for residents, but not “best-in-class” among non-residents

State Outline Recognition

What state is this?
(Correct Identification)

■ NC Residents ■ Non-Residents



Source: Primary Research

ADDITIONAL BRAND LOGOS

Here are some other ideas we considered

Brand Logo #1



Brand Logo #2

114



Brand Logo #3

115

North Carolina: Beautiful Destinations
Southern Innovation
Charming People

Brand Logo #4

116



Brand Logo #4 (continued)

117



NORTH CAROLINA



Department of Commerce

NORTH CAROLINA



Department of Environment
& Natural Resources

NORTH CAROLINA



Department of Labor

Brand Logo #5

119



Brand Logo #6 (continued)



Brand Logo #6 (continued)

121

NORTH ★ CAROLINA

Southern Innovation. Beautiful Destinations. Charming People.

NORTH ★ CAROLINA

Innovative. Beautiful. Charming.

N ★ C COMMERCE

Brand Logo #6 (continued)

122



Innovative. Beautiful. Charming.



Brand Logo #6 (continued)

123



Brand Logo #6 (continued)



Brand Logo #6 (continued)

125

N★C COMMERCE

N★C DENR

N★C DOL

Brand Logo #6 (continued)



 NORTH
 CAROLINA