



# BALTIMORE REGION ECONOMIC BRAND

Overview and General Session

# AGENDA

1. Welcome & Purpose
2. Overview & Vision
3. Partner Selection Process
4. Research Highlights
5. Key Learnings
6. Elements of the Brand
7. Questions & Discussion



# WELCOME & PURPOSE

## **The Goal:**

Position the Baltimore Region for national & global competitiveness

## **Why This Matters:**

A unified brand strengthens our message, attracts investment, and elevates the region's profile



# GBC Overview

Greater Baltimore Committee is the **leading voice for the private sector** in the Baltimore Region.

- Dedicated to fostering **prosperity** in this region.
- Comprised of **300+ members** across business, nonprofit, and education
- Driving **inclusive growth and investment**
- Focused on **economic opportunity, infrastructure & collaboration**



# GBC Multi-Year Agenda

**Set of 12 initiatives** that support the organization's role in shaping the Baltimore Region's economic future.

## Goal Areas:

- Economic Opportunity
- Transportation & Infrastructure
- Collective Impact

An aerial, high-angle photograph of a city, likely Boston, showing a dense urban landscape with numerous buildings, streets, and a waterfront area with a harbor and bridge in the distance. The image is in grayscale and serves as a background for the text on the left side of the slide.

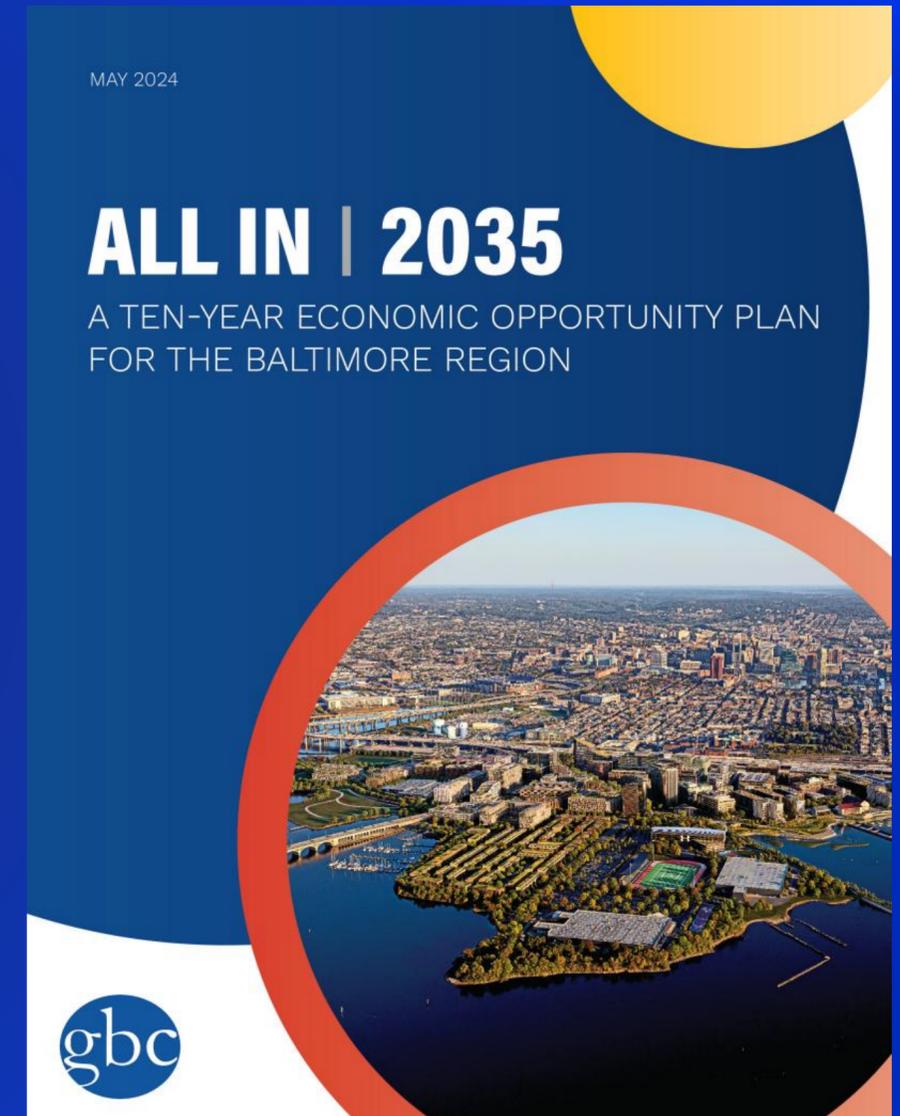
# **GBC Multi-Year Agenda**

**(cont.)**

**In the Multi-Year Agenda,  
GBC positioned the need  
for a regional brand as  
the #2 initiative.**

## Rooted in the 10-Year Plan, the Regional Brand is designed to:

- Elevate the region's profile
- Unify the region's messaging
- Support the region's long-term growth and investment goals



**“The region’s positive economic momentum can be accelerated by a more coordinated, collaborative, and inclusive approach to retaining and attracting jobs, businesses, and investment.”**

*– GBC’s All In 2035 Plan*

If we amplify our distinct story that highlights the region's value, vision, and competitive edge, we will affirm **the Baltimore Region is a compelling destination for growth.**

# **PARTNER SELECTION PROCESS**

# COLLABORATIVE APPROACH

**FALL 2023**

**Launched RFP**

**WINTER 2024**

**Vetted 23 local and  
global submissions**

**SPRING 2024**

**Selection made by  
proposal committee**

# REGIONAL BRAND SELECTION COMMITTEE



**Trish McClean**  
Visit Baltimore



**Emma Wesoloski**  
National Aquarium



**Keith West**  
M&T Bank



**Madeleine Stokes**  
UpSurge Baltimore



**Brennan Murray**  
Baltimore Development Corporation



**Michael Teitelbaum**  
Baltimore Magazine



**Wendy Bronfein**  
Curio Wellness



**Vicki Franz**  
I95 Business Magazine



**Karen Holt**  
Harford County Office of Economic Development

# Our Selection

Resonance  
In partnership with Ipsos and Timber  
Strategies

New York-based Resonance is a global  
Place-branding, place-marketing and  
place-based strategy consultancy.

Resonance creates transformative  
strategies, brands and campaigns that  
help countries, cities and communities  
attract talent, visitors, residents and  
investment.

brussels 

HOUSTON

Los Angeles

 Hamburg  
Marketing

San Diego

Ho Chi Minh City

 DESTINATION  
CANADA

VANCOUVER

Ottawa

  
ARLINGTON  
VIRGINIA

ChristchurchNZ

 Choose  
Scottsdale.

  
HARRISBURG REGIONAL  
CHAMBER & CREDC

VisitPITTSBURGH 

PARTNER  
TULSA

PROJECT TEAM

# A Global Expert Team in Place Branding, Business Attraction & Reputation

resonance



**Jeremie Feinblatt**  
Vice President,  
Strategy



**Camille Trummer**  
Engagement  
Strategist



**Dianna Carr**  
Vice President,  
Storytelling



**Dominic Prevost**  
Group Creative  
Director



**Shannon Duffy**  
Account Manager



**Jason McGrath**  
EVP, Reputation



**Bob Knott**  
Founder & Principal

# RESEARCH HIGHLIGHTS

# UNDERSTANDING THE LANDSCAPE

## Partner Engagement

**100+ stakeholders and GBC partners engaged**

## In-Market/Out-of-Market Research

**Nationwide survey of 250 Business Decision Makers in key growth sectors**

## Field Research

**Regional Site Visits**

# Our Competitive Set



## Assessed Baltimore Region Against 12 Competing and Aspirational Regions

### Peer Regions:

- Austin
- Charlotte
- Columbus
- Detroit
- Houston
- Indianapolis
- Nashville
- Philadelphia
- Pittsburgh

### Aspirational Regions:

- Atlanta
- San Francisco
- Seattle

# We measured Baltimore's performance across 44 metrics and 5 dimensions

## Liveability

- Safety
- Traffic
- Outdoors
- Housing Availability
- Housing Affordability
- Cost of Living
- Biking Infrastructure
- Walkability
- Access to Healthcare
- Public Transportation

## Lovability

- Cultural Institutions
- Events
- Nightlife
- Restaurants
- Shopping
- Family-Friendly Activities
- Social Media
- Travel Media
- Online Reputation

## Prosperity

- Size of Economy
- Growth of Economy
- Job Opportunities
- Population
- Prime Age
- Diversity
- Income
- Shared Prosperity
- Standard of Living
- Educational Attainment
- Meeting Space
- Airport Connectivity
- Commute Patterns

## Innovation Ecosystems

- LQ of creative-related employment
- Percentage of jobs in creative occupations
- 5-year jobs in creative occupations growth rates
- LQ of life-science-related employment
- Percentage of jobs in life-science-related occupations
- 5-year growth rate of life-science-related occupations
- Number of startups
- University R&D Expenditures
- Number of patents by Region
- 2-digit NAICS industry exported sales
- LQ of light manufacturing and logistics employment
- Share of total jobs that are light manufacturing and logistics

# TRIANGULATED METHODOLOGY

## Quantitative

- Surveyed 250+ national BDMS
- Benchmarked vs. 12 peer/aspirational regions

## Qualitative

- Partner Roundtables
- Partner 1-on-1 interviews
- Regional site visits



# TRIANGULATED METHODOLOGY

(CONTINUED)

## **Strategic Synthesis**

- 20+ reports reviewed
- Engaged local creatives to identify authentic brand identity

## **Concept Validation**

- Commissioned external evaluation of three final brand options



# KEY LEARNINGS

# 1

**We need to be better  
advocates.  
Stop defending,  
start promoting.**



# It's Time We Move on From *The Wire* Perception

It debuted the same year as the Enron scandal, the Euro was introduced, LinkedIn was founded, and Apple released its 2nd iPod.

It ended the same year Barack Obama was first elected President of the United States, Bernie Madoff was arrested, and Lehman Brothers was a trusted financial institution.

Many modern-day business decision makers were mere children during the show's run.

## It's history.

The Wire / First episode date

# June 2, 2002

USA

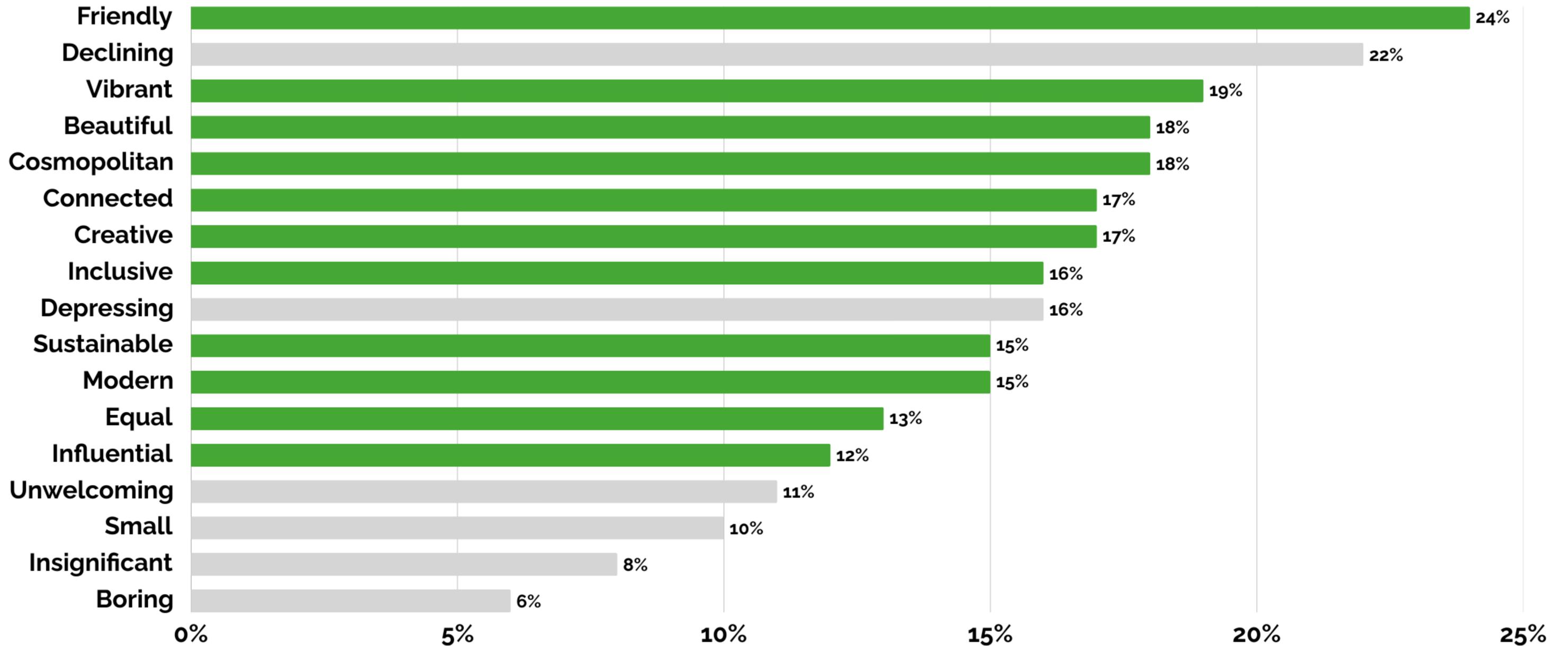
The series premiered on **June 2, 2002**, and ended on March 9, 2008, comprising 60 episodes over five seasons.

# 2

**We have differing views  
when it comes to our  
personality.**



# Associations with Baltimore are Resoundingly Positive



QWORD. Which of the following words do you associate with each of the following cities? Select all that apply.

## **Stakeholders Align on One Major Thing: “It’s Good to Live Here”**

**“Charm City hasn’t lost its charm.”**

**Once you’re in, you’re in. People protect each other, which allows us to take risks.”**

**“There’s such a low bar for entry. We’re highly accessible and affordable.”**

**“A lot of our quality of life is what you do on a Saturday morning. Saturdays feel really good in Baltimore.”**

**Right place for everyone: C-suite executives will find the lifestyle they need and lowest paid staff will be able to live in the city.”**

# 3

**Our branding efforts need to help and be focused on driving investments.**



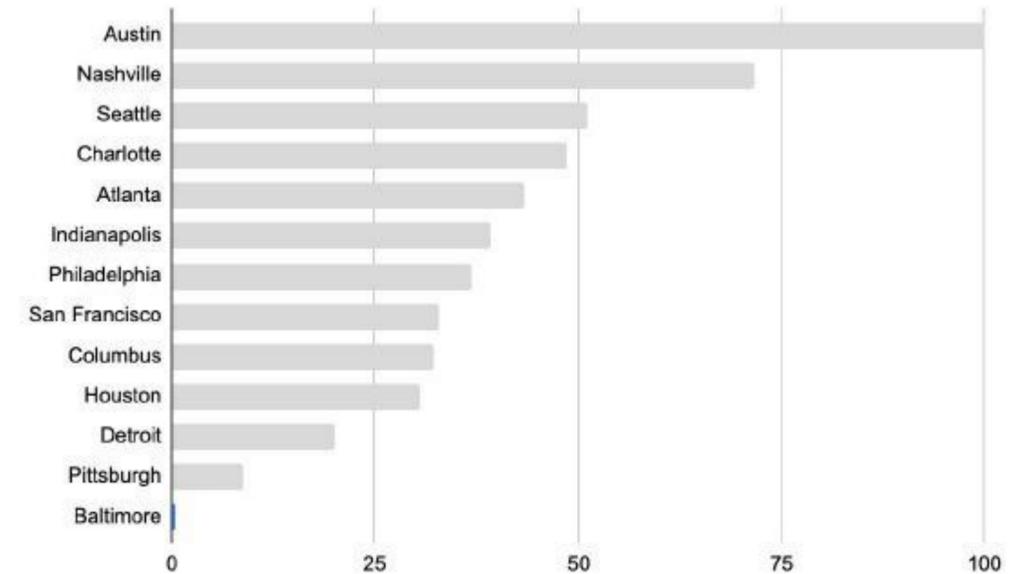
# Investment Is Our Priority

Data confirms our opportunity is driving new capital and investment to spur growth.

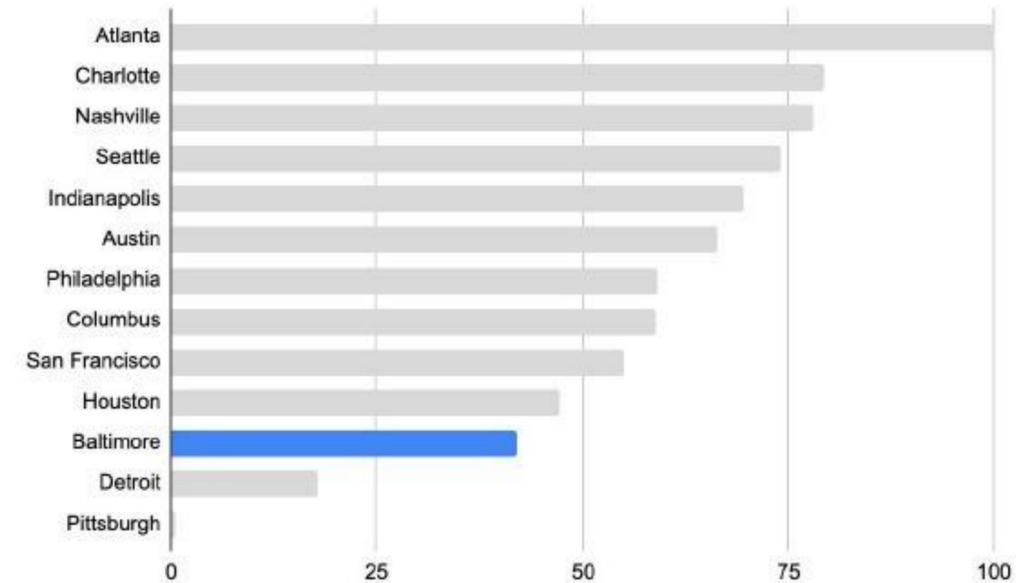
“We need more tech companies to bring onboard bigger groups.”

“Only 50% of companies that start at Hopkins stay here.”

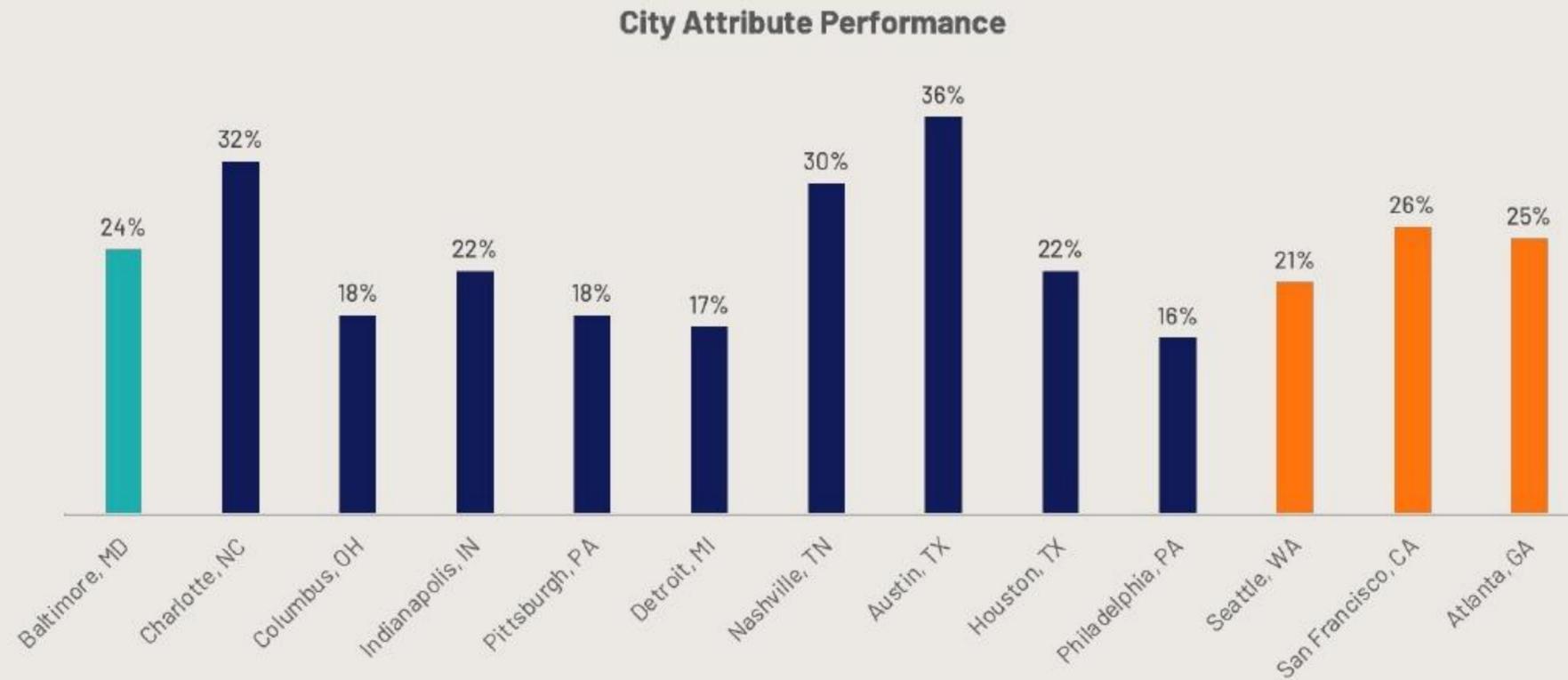
Growth of the Economy (5 years)



Job Opportunities



We rank #4 in “A good city to invest in”  
And +3 pts above average in likelihood to invest



QATTR. Which of the following cities do you associate with each of the following attributes? Select all that apply.  
IS A GOOD CITY TO INVEST IN

Likelihood to invest

26%

of respondents are interested in locating or investing in a business in Baltimore in the next 10 years

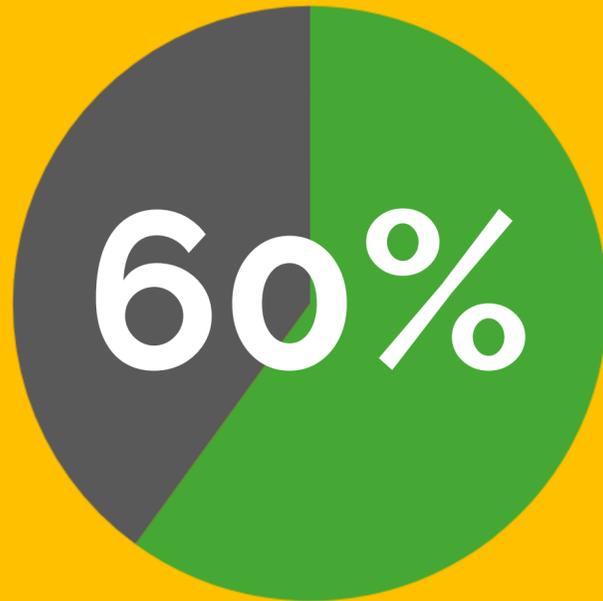
+3 points above all city average

# 4

**Baltimore has a rather good relative perception from business decision makers, in line with our relative performance against key metros.**



# Baltimore Has a Good Perception From Business Decision Makers



**of business leaders in our key sectors have a favorable impression of Baltimore**



**3 Points**

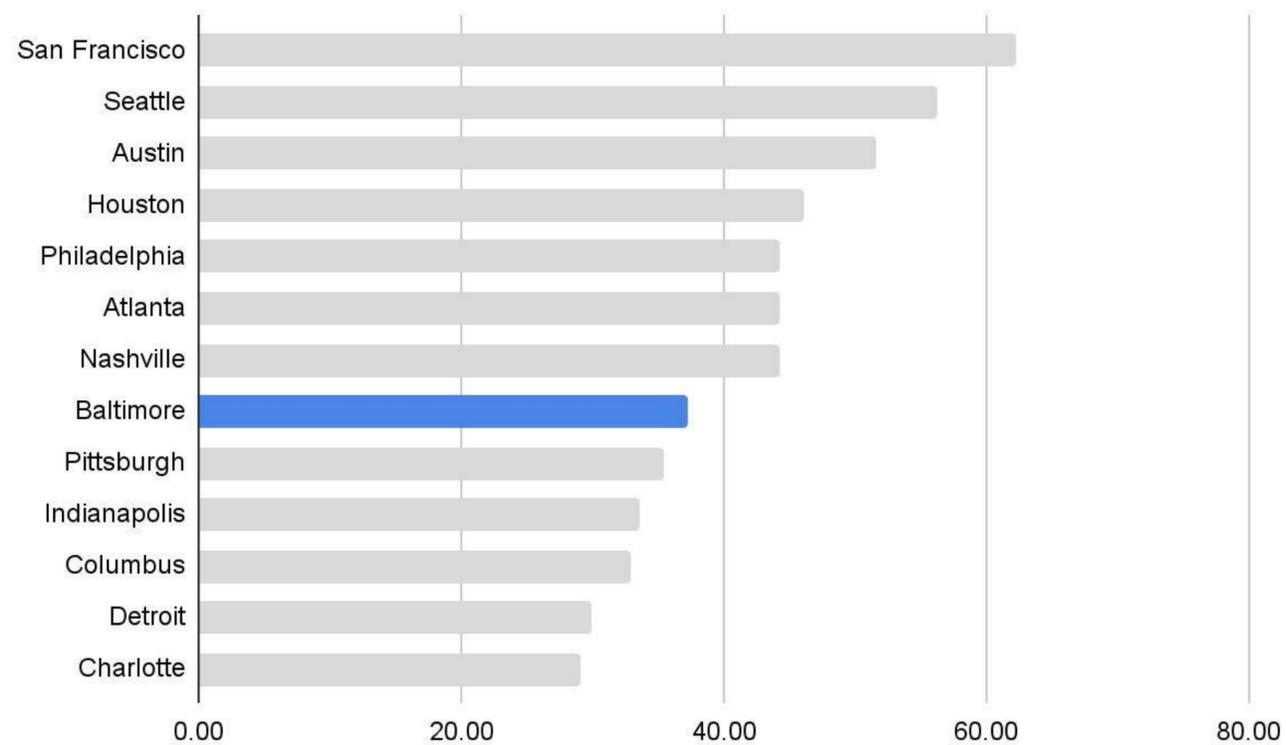
**Above average in terms of likelihood to invest in Baltimore in the next 10 years**



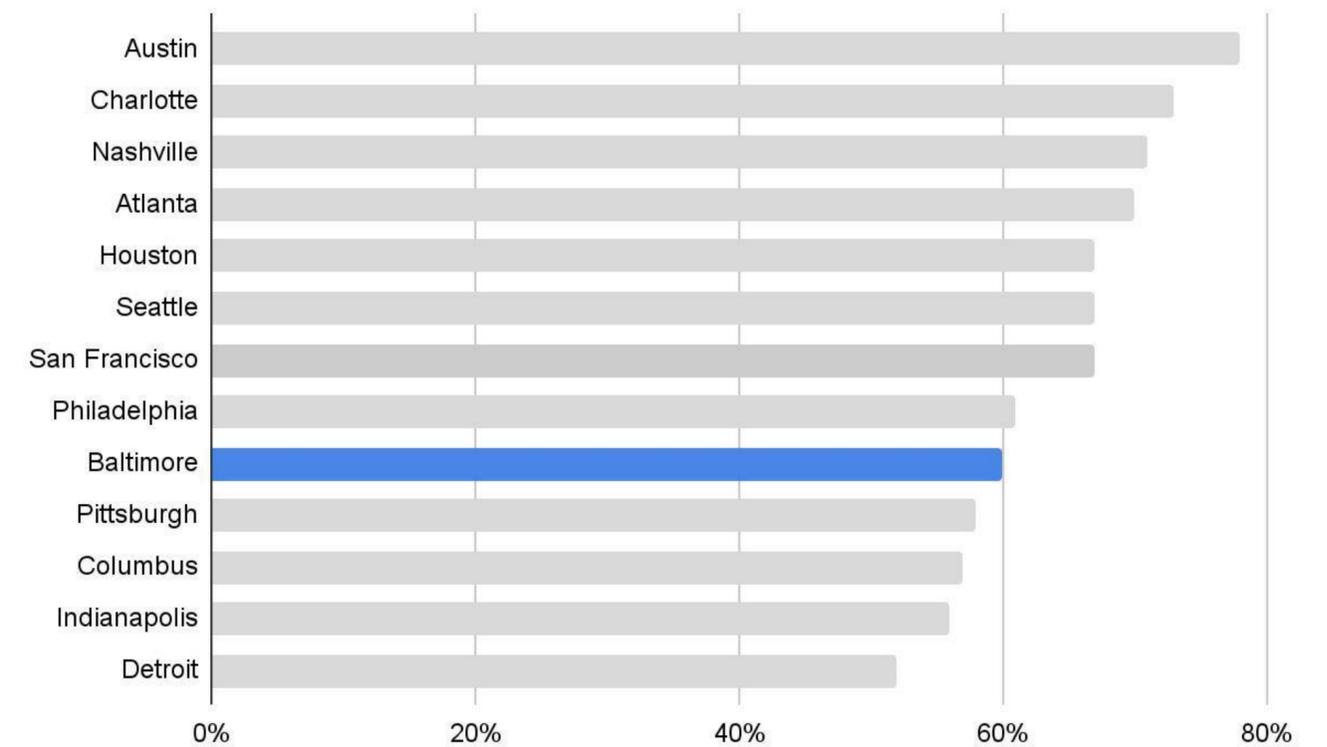
**of consumers have a positive impression of Baltimore**

# There is a Strong Alignment Between Performance and Perception

## Benchmarking Performance

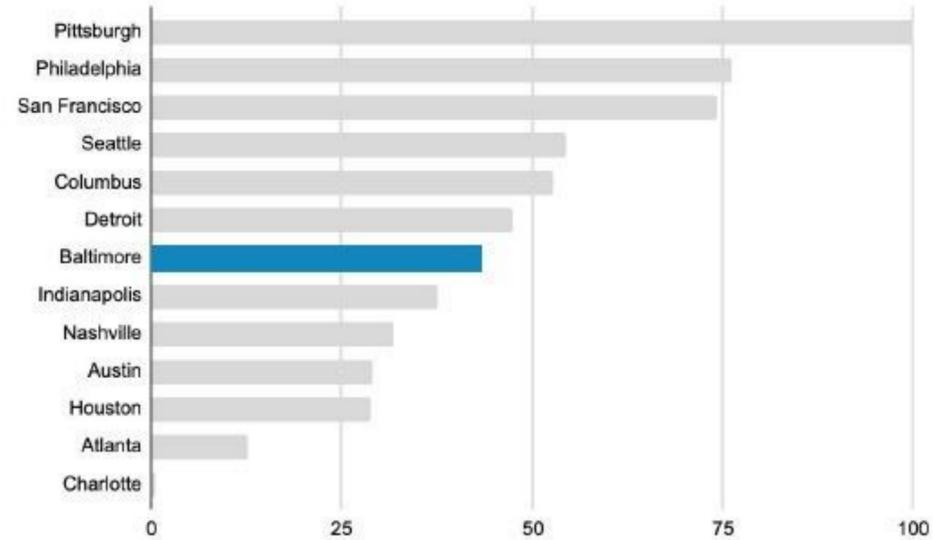


## Favorable Impressions

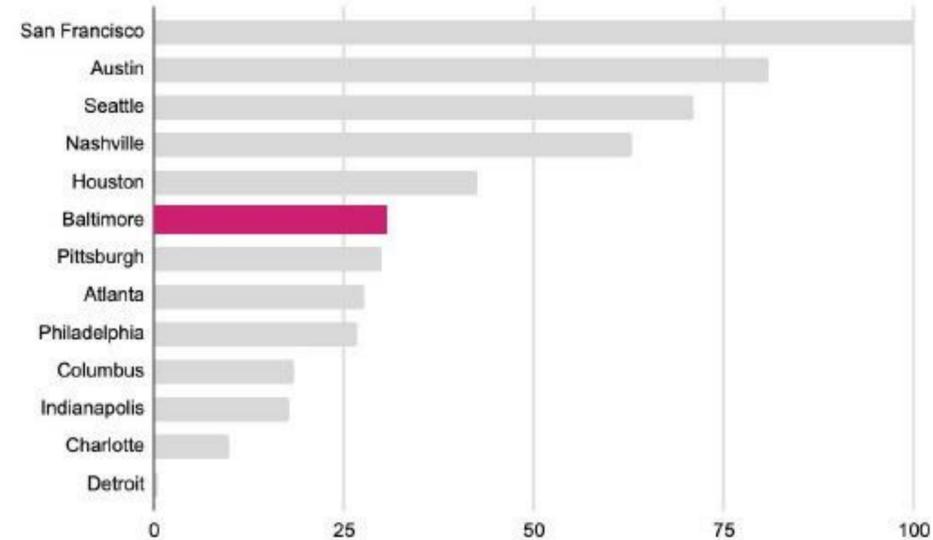


**In terms of performance, Baltimore is aligned with its competitive and aspirational set.**

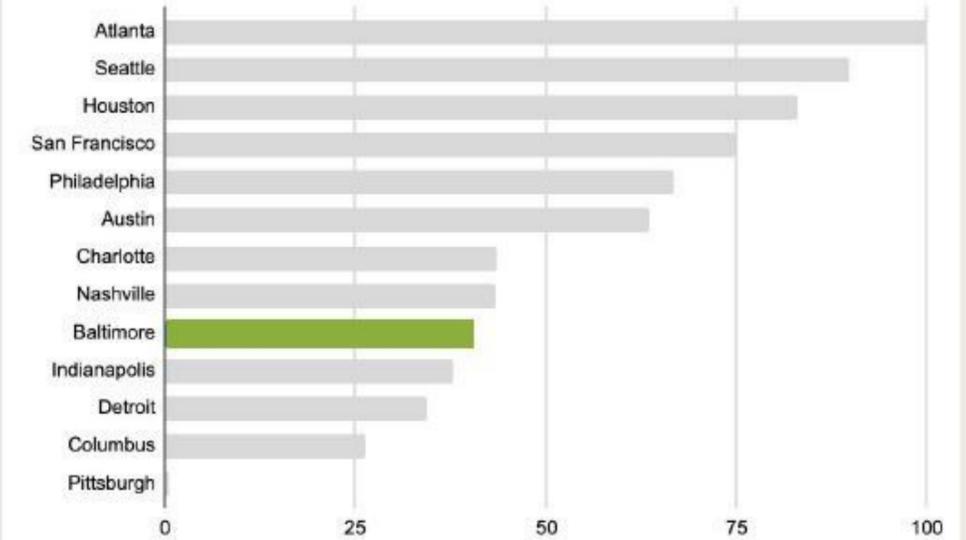
## LIVABILITY



## LOVABILITY



## PROSPERITY



# Though We Rank Behind in Terms of Perception

“Has a high quality of life”

City Attribute Performance



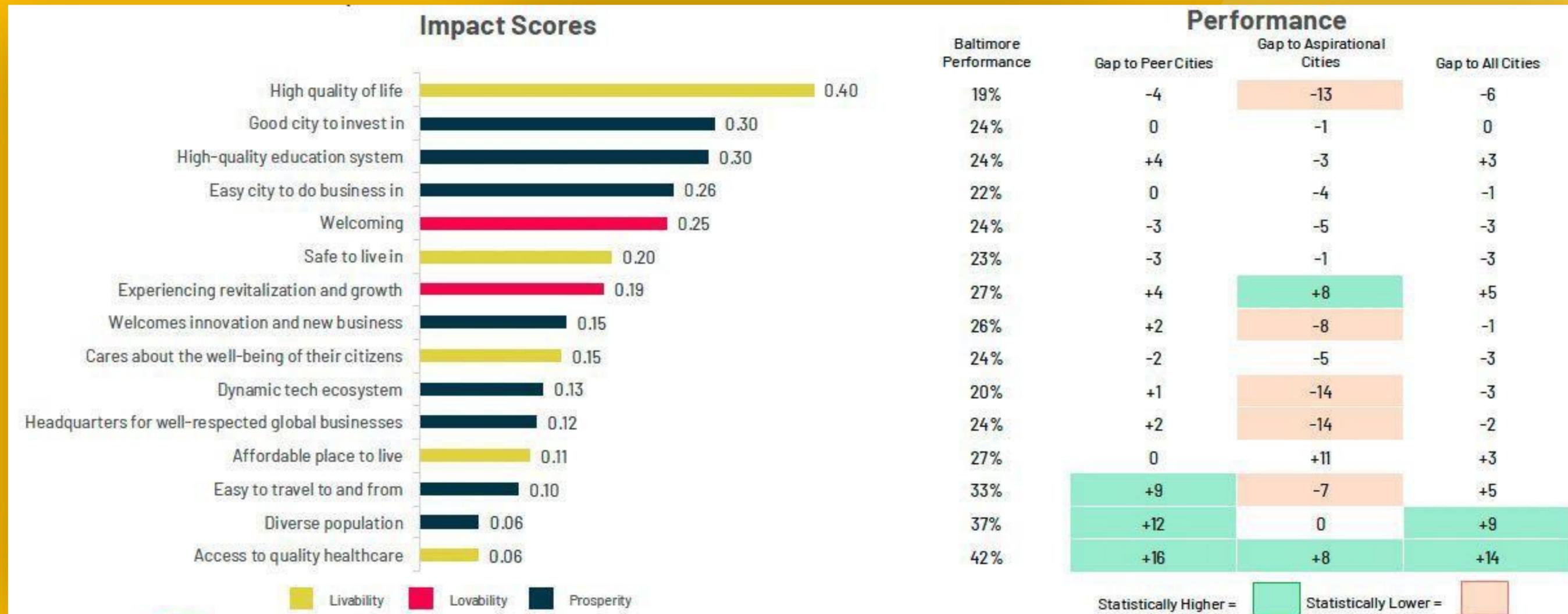
Ipsos Business Decision Leader survey  
Which of the following cities do you associate with each of the following attributes? Select all that apply

5

**Quality of life and ease of doing business are two key priorities for communication.**



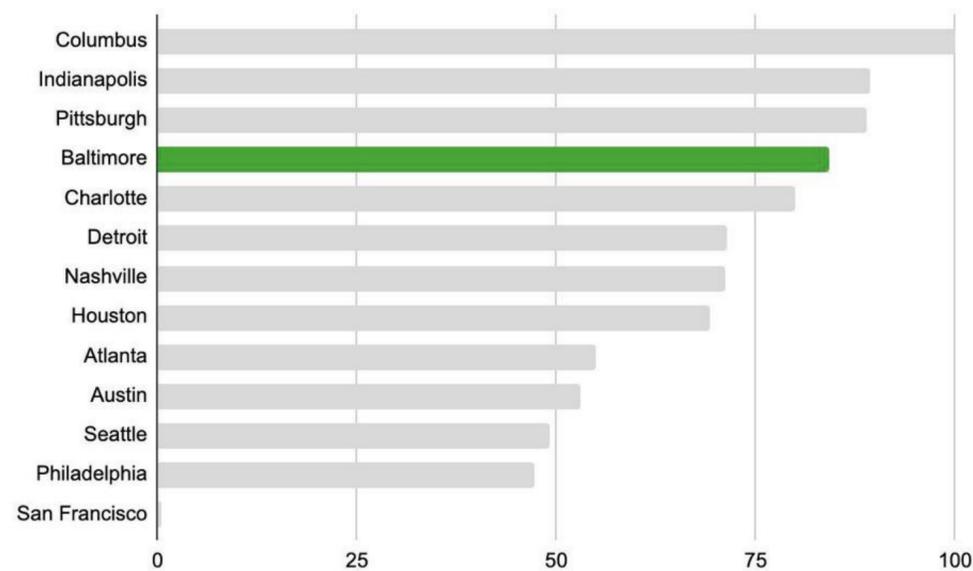
# Quality of Life and Ease of Doing Business Are Two Key Drivers of Investment for Business Leaders



# We Rank High in Quality-of-Life Indicators

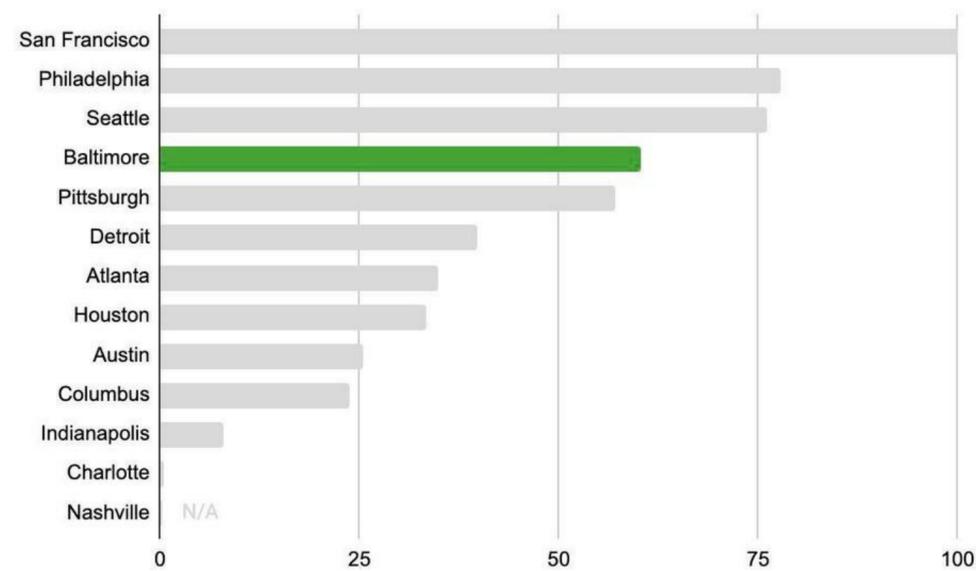
Cost of Living and Housing Affordability are our competitive strengths. Access to Healthcare is also an area where we perform well.

## Cost of Living

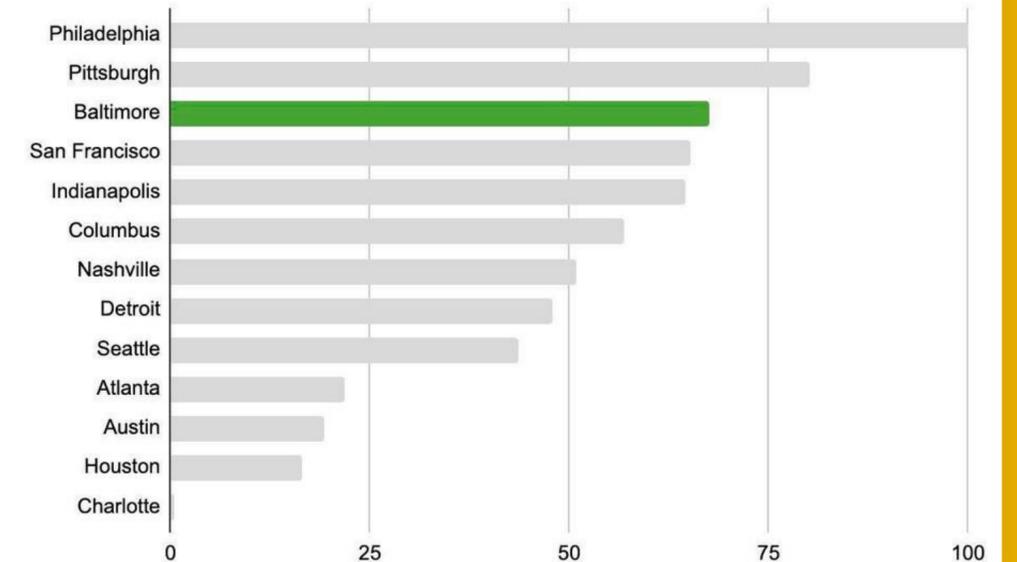


Cost of living measured by utilities, healthcare and transport. Baltimore ranks #4 in cost of Living but #7 in terms of housing affordability

## Walkability

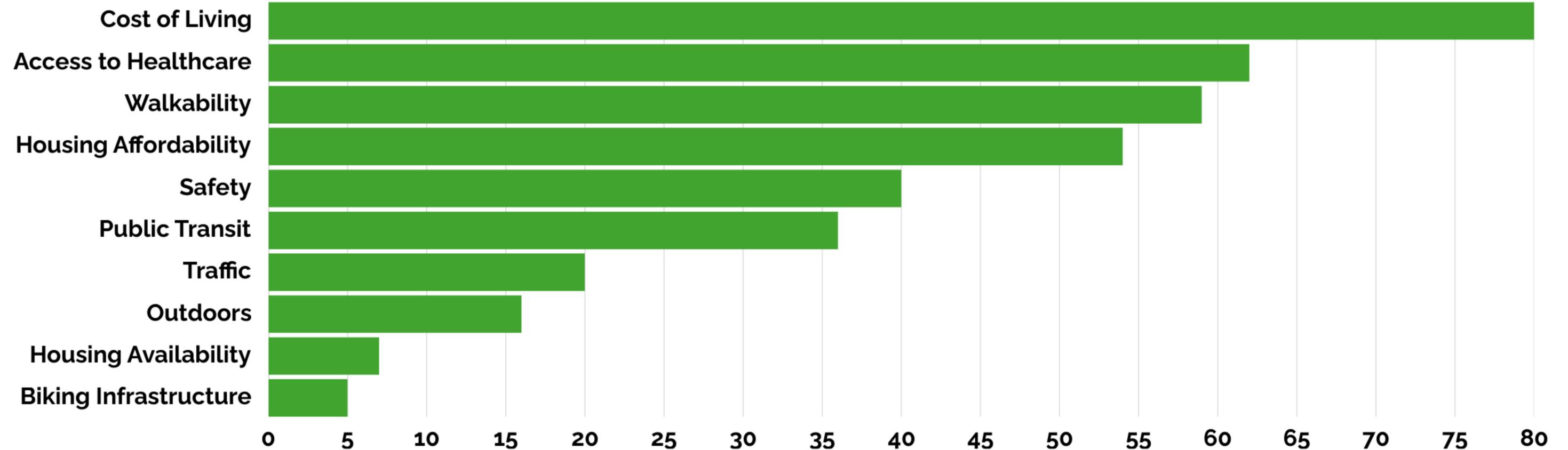


## Access to Healthcare



# Liveability is Our Core Strength

Cost of living and housing-affordability are our competitive strengths. Access to healthcare is also an area where we perform well.



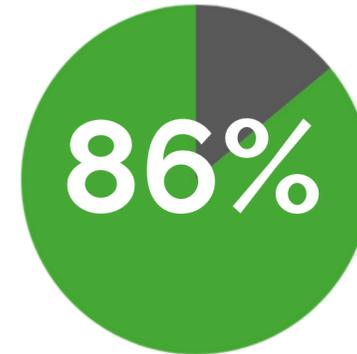
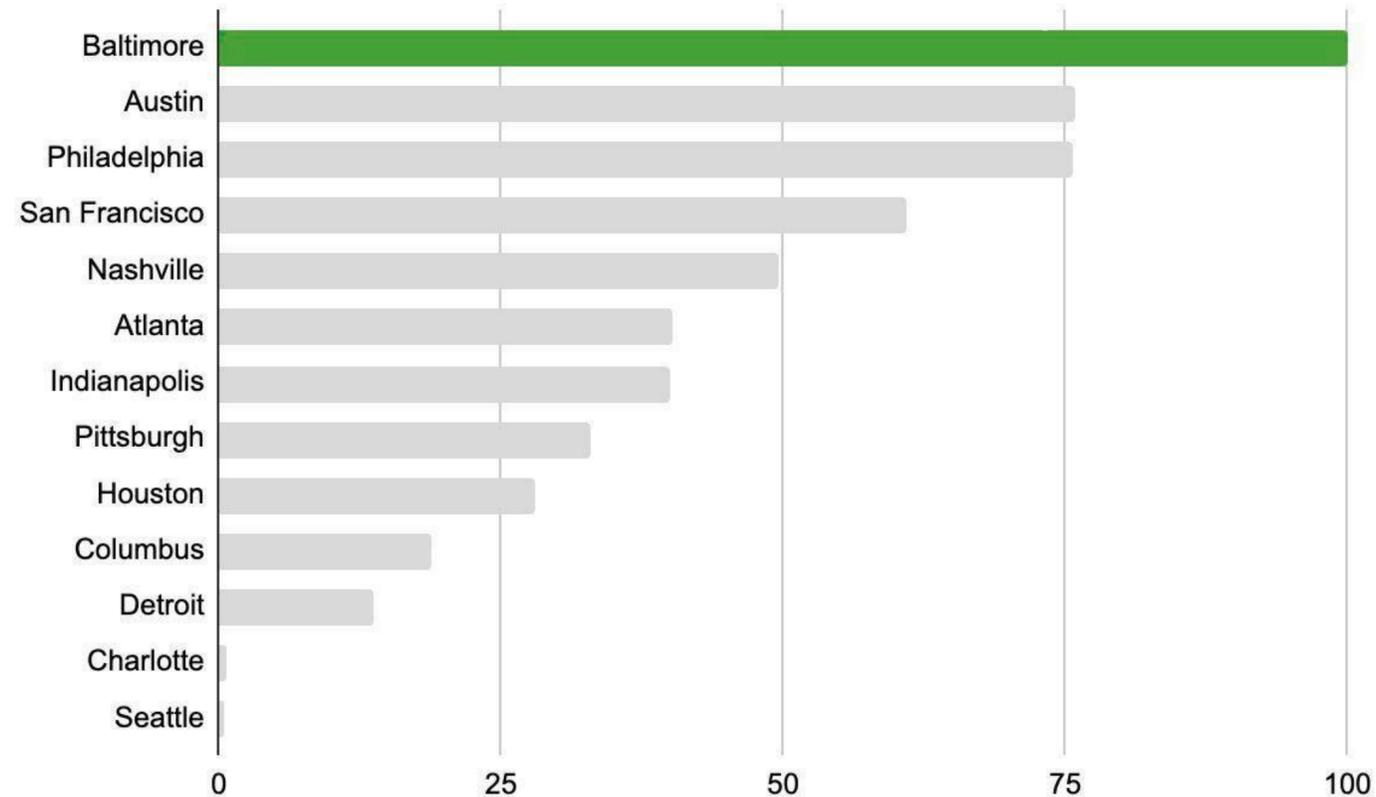
# 6

**Baltimore is recognized as a leader in logistics and light manufacturing, which is a key asset for our region.**



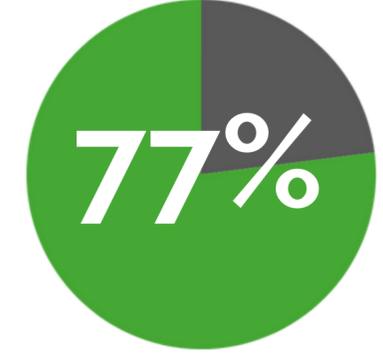
# Baltimore Region is a National Leader in the Supply Chain Economy

## Our Region Performs #1 in Logistics and Light Manufacturing



**86%** of business leaders in logistics and manufacturing familiar with Baltimore have a favorable impression on Baltimore.

**48%** of them are likely to invest in the region.



**77%** of business leaders in logistics and manufacturing believe that Baltimore is a hub for their sector.

**79%** of them believe Baltimore is growing importance as a sector hub.

As measured by Baltimore's performance in Location Quotient (LQ) of Logistics and Light Manufacturing Ecosystem, Number of Jobs, Growth of Industry, Exported Sales, Share of Exported Sales In Region Sales. Population within a 250 Mile Radius

# 7

**There's a renewed energy that spurs innovation, backed by a growing and competitive life sciences cluster.**



A photograph of two scientists in blue lab coats working in a laboratory. One scientist is wearing black gloves and is focused on a piece of equipment. The other scientist is partially visible on the left. The background is a typical laboratory environment with various pieces of equipment and a clean, professional atmosphere.

# 36%

**Growth of the region's Life Science industry since 2019, in line with San Francisco, Seattle and Austin.**

“The region’s **grittiness and innovation** is a boon for Life Sciences.”

“There’s a **bold audacity**, a new **sense of confidence**.”

“The bridge collapse showed the world how **we can work together successfully**.”

“We’re at an inflection point. What’s happening in Baltimore is different... There’s a lot of cool stuff happening, and **together, it’s a national story**.”

“The investment that we’re making (Hopkins) in AI is greater than Harvard, MIT and Stanford combined. If we pull this off, **we can pull the center of gravity**.”

# KEY LEARNINGS

1. We need to be better advocates, stop defending, start promoting.
2. We have differing views when it comes to our personality.
3. Our branding efforts need to help and be focused on driving investments.
4. Baltimore has a rather good relative perception from business leaders, in line with our relative performance against key metros.
5. Quality of life and ease of doing business are two key priorities for communication.
6. Baltimore is recognized as a leader in logistics and light manufacturing, which is a key asset for our region.
7. There's a renewed energy that spurs innovation, backed by a growing and competitive life sciences cluster.

# **ELEMENTS OF THE BRAND**

## TRANSLATING OUR LEARNINGS INTO A BRAND

The key learnings about  
the region revealed a  
**central, emerging theme.**

**WE'RE CALLED  
THE CITY OF**



---

**FIRSTS FOR  
A REASON.**

**THE  
INNER  
HARBOR  
WAS THE  
FIRST OF  
ITS KIND.**



**THE FIRST MILE  
OF RAILROAD  
WAS BUILT**

**RIGHT**



**HERE**

**WE INFLUENCE  
THE COUNTRY  
AND ALWAYS HAVE.**

---

**– MAYOR BRANDON SCOTT**

**WE'RE SMALL  
ENOUGH TO  
BE AGILE.**

**BUT BIG  
ENOUGH TO  
MATTER.**

**WE'VE NEEDED**



**TO REINVENT  
OURSELVES MORE  
THAN ONCE**

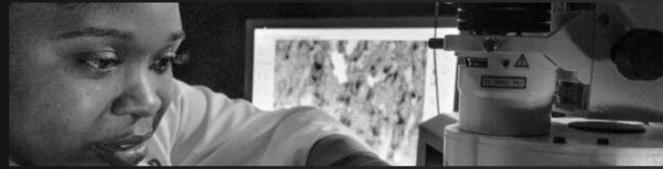


**WE MOVE FORWARD—BOLDLY AND TOGETHER!**

**WHICH  
MAKES US  
FEARLESS.**

---

**WE'RE HOPEFUL  
FOR THE FUTURE,  
TACKLING  
NEXT-GEN  
RESEARCH  
& NATIONAL SECURITY.**





**AND**

**SOLVING THE  
PROBLEMS OF  
TOMORROW.**

---

**AGILE**

**+**

**FEARLESS**

**+**

**HOPEFUL**

**(THERE'S A WORD FOR THAT.)**

**BOLD**

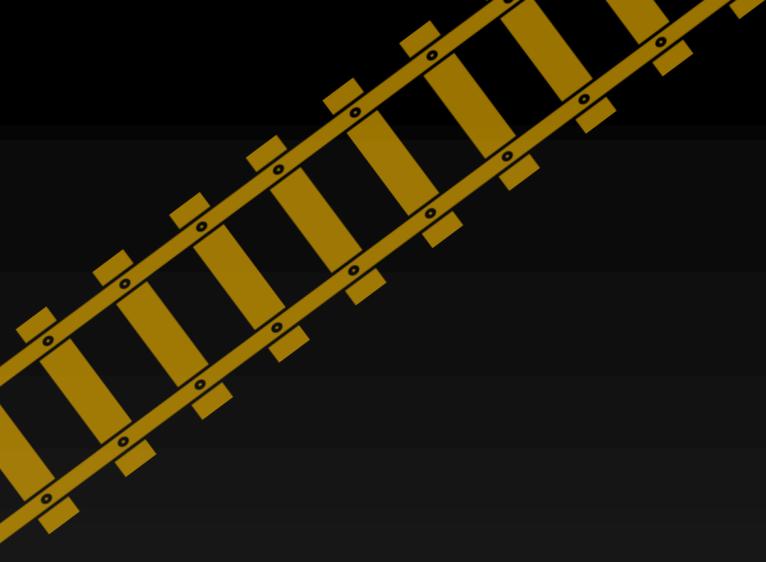
**MOVES**

**THE BOLD MOVES**  
**REGIONAL BRAND**



The **Bold Moves** brand captures the region's fearless spirit by celebrating its history of innovation and its willingness to tackle complex challenges head-on.





From the first mile of railroad,  
to pioneering life sciences advancements,  
the **Baltimore Region continues to  
redefine itself, making bold decisions**  
that shape the nation's future.



## Resonance engaged several Baltimore-based creative artists and designers to inform the design options for the Baltimore Regional Brand



Jonathan Carrington is a Baltimore-based artist and graphic designer with a diverse skill set in brand identity, illustration, fashion, and business strategy.



Ariba Kamran is a Graphic Designer specializing in Branding, Typography, Variable Type Design, and Print Design. With a keen passion for South Asian art and design history.



Akshita Chandra is a Baltimore-based designer and art director whose work has been recognized by Adobe, Type Directors Club and Communication Arts, among others.



Christopher Chester is graphic designer deeply inspired by the region's music scene. His design work has been featured in *Baltimore Beat* and *Bmore Art* among other outlets.

After refining our choices,  
the *Bold Moves* Regional Brand art was selected:

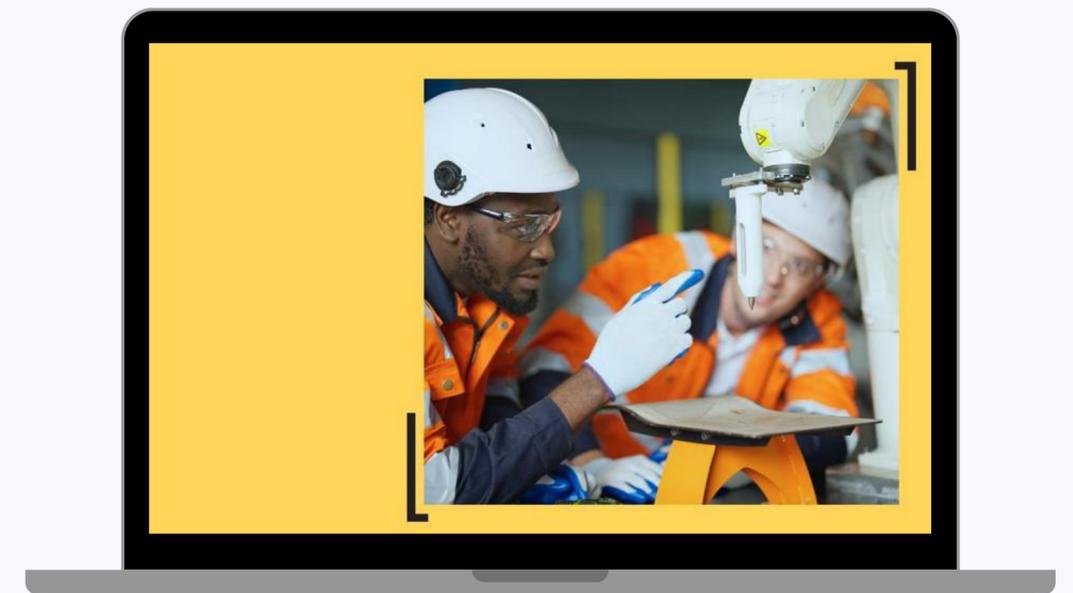
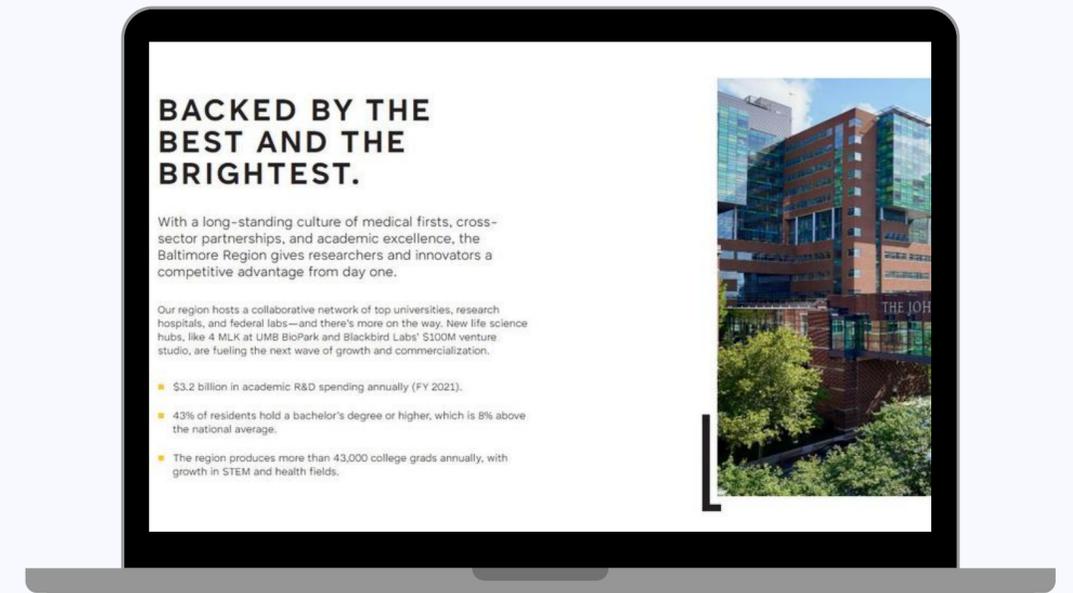
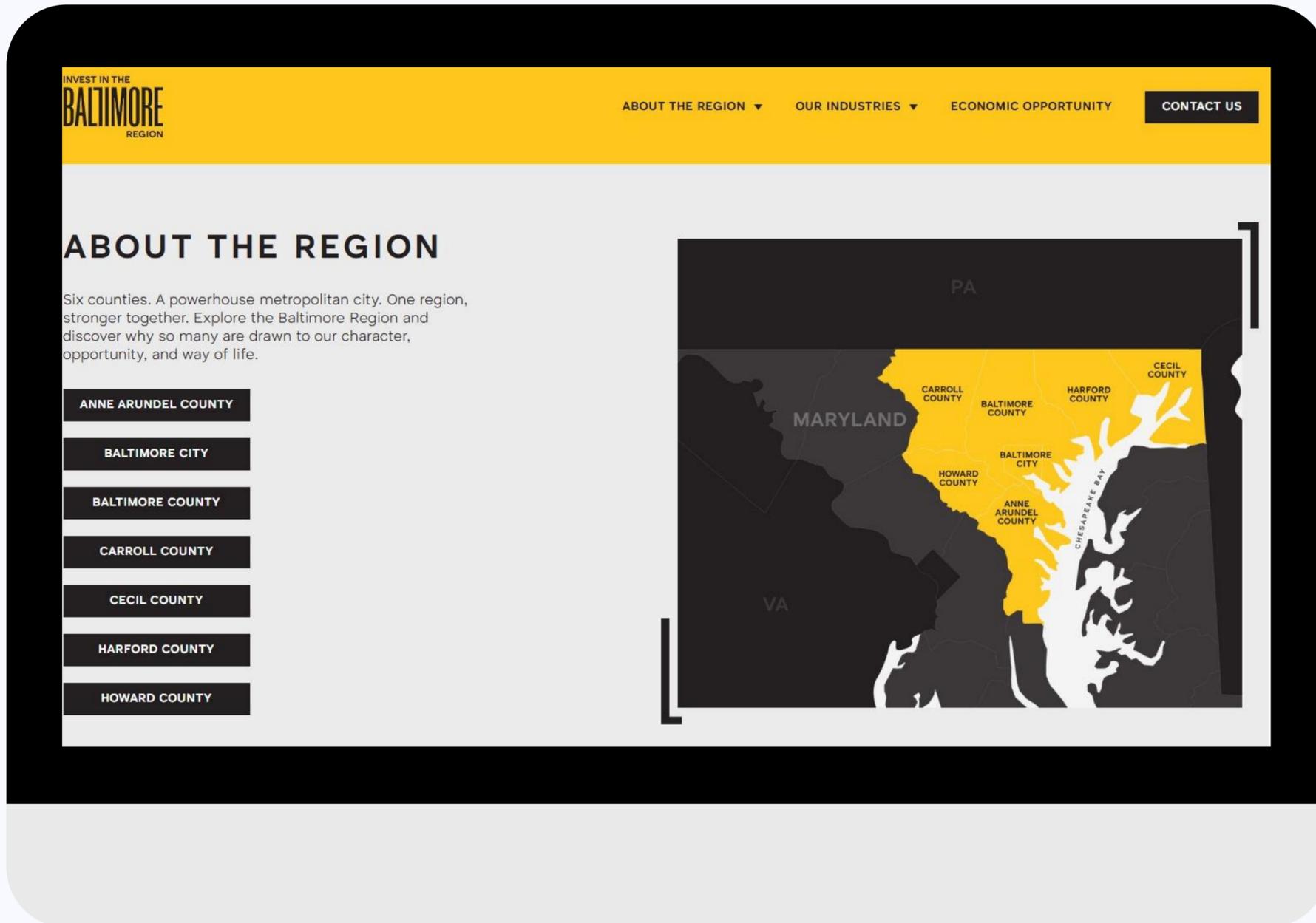
BOLD MOVES  
**BALTIMORE**  
REGION



# BOLD MOVES REGIONAL BRAND ASSETS



# BOLD MOVES REGIONAL BRAND ASSETS



# ELEMENTS OF THE BOLD MOVES BRAND

**Brand Narrative**

Defined by reinvention, resilience, and progress

**Brand Positioning**

We explore opportunities that others won't

**Brand Themes**

Collaboration + Innovation + Momentum

**Brand Voice**

Bold + Optimistic + Unapologetic

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# ACTIVATIONS

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**Brand Awareness**

**Earned Media + Violet PR**

**Brand Toolkit**

**Shared language for talking about the region**

**Brand Equity**

**100 Regional Ambassadors by end of 2025**

**Brand Buy-In**

**Invested Partners to expand our message globally**

# CALL TO ACTION

**JOIN THE MOVEMENT: Amplify The Brand**

**SUPPORT THE ROLLOUT: Schedule Your Brand Briefing**

**ADOPT THE NARRATIVE: Become An Ambassador**

**SHARE YOUR STORY: Tell Us About Your Bold Moves**



**THANK YOU**  
**QUESTIONS & DISCUSSION**

*[www.investinbaltimorerregion.org](http://www.investinbaltimorerregion.org)*

**BOLD MOVES**

**BALTIMORE**

**REGION**

Visit [www.investinbaltimoreregion.org](http://www.investinbaltimoreregion.org)