

# Leveraging the Vermont Brand



## INSIGHTS & OPPORTUNITIES

July 2010

A collaboration between Vermont's Chief Marketing Officer, Department of Tourism & Marketing, and the Vermont Ski Areas Association.

Research performed by Resource Systems Group, Inc., White River, VT.

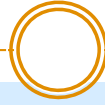
# Overview



- Why is this important
- What we learned
- Where is the opportunity

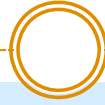


# Vermont Brand Project Goals



- Common and current understanding of Vermont's Brand
  - Is our current thinking aligned with customer perceptions?
- Understand where the opportunity lies
- Identify effective strategies for promoting Vermont
- Determine the triggers for conversion

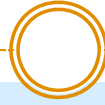
# What is our message?



*A place of rural beauty, a place where farms produce wholesome food and where mountains, lakes and trails offer vigorous, refreshing outdoor recreation, a place where history is important and relationship to the land still means something. Vermont is a safe place, away from the noise and crime of the cities.*

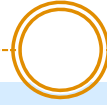
*~ describes promotion of Vermont in 1891,  
taken from article written by Tom Slayton (2003)*

# Role of the Vermont Brand



- Platform, or an ingredient, for your own brands – images, messages, and values
- Provides context for your audiences when considering choices
- Differentiates products and choices in a competitive market

# Research Methodology



- Online surveys
- Sample sources:
  - Inquiry databases from Department of Tourism & Marketing and Vermont Ski Areas Association
  - Purchased sample through Resource Systems Group, Inc.
- Respondent criteria:
  - Vacationed within the last two years
  - Spent at least \$50 at vacation destination
  - Lived within defined geographic market
    - NYC metro, MA, VT, Ottawa, Toronto, or Montreal

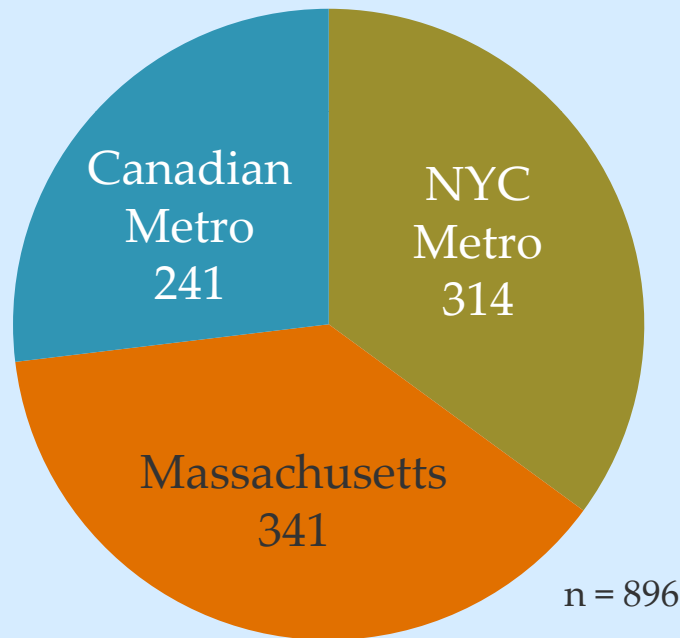
# Sample



Vermont Vacation  
Providers



Out-of-State  
Vacationers



Vermont Residents /  
Vacationers

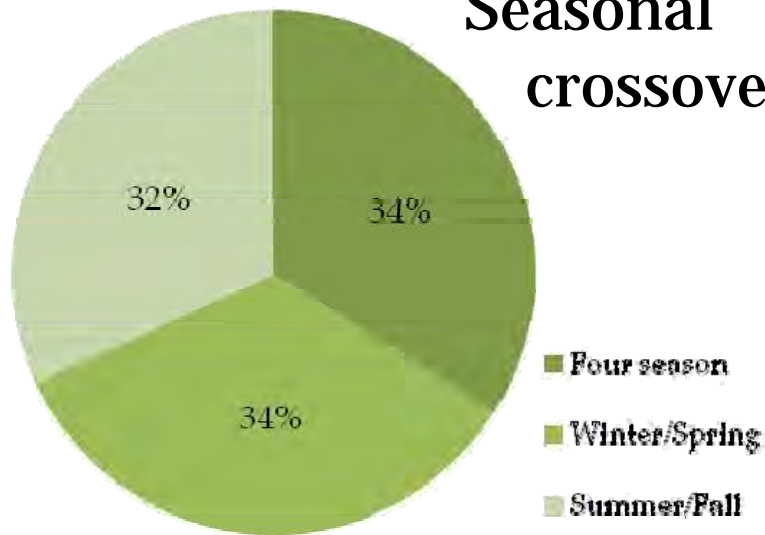


For the purposes of this study, a “vacation” was defined as: *“any day or overnight trip outside of your usual travel or commuting pattern, where you participated in any leisure/non-business activities”*

# Highlights of interesting findings



## Seasonal crossover

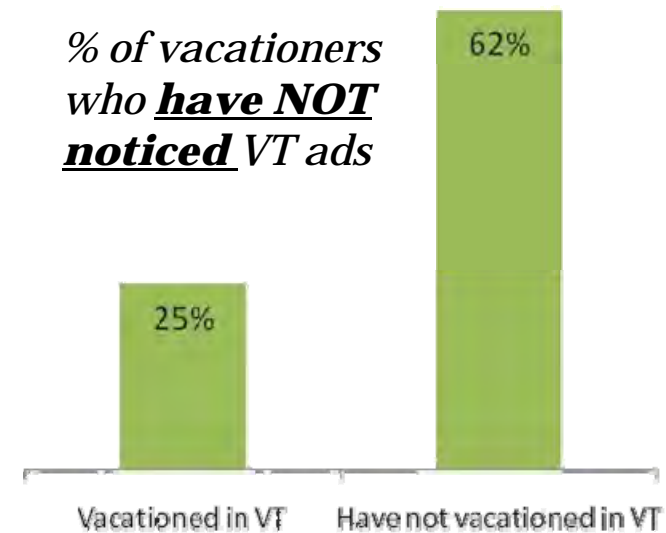


*Vermont vacationers are evenly split across types of seasonal visitor.*

*Vacationers who have not visited Vermont are significantly more likely not to have seen a Vermont advertisement.*

## Advertising impact

*% of vacationers who **have NOT noticed** VT ads*





# Highlights of interesting findings



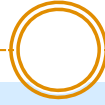
## **Distinct regional market differences**

- Clear differences in attitudes and preferences
- New York metro market is seeking different experience than Massachusetts visitor

## **Perceptions of vacation providers are aligned with markets**

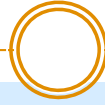
- Little to no differences in image testing
- Phrase and keywords selected were similar
- See Vermont as more differentiated than vacationers

# Key opportunities identified



- Target marketing to regional preferences
  - Understand regional market preferences
  - Focus on “open” and important attributes
  - Incorporate images and messaging that is representative of Vermont and speaks to vacationer preferences
- Target people who haven’t vacationed in Vermont
  - Highlight characteristics attractive to new markets
- Convert single-season visitors to four season visitors

# Approach to understanding our markets



## By Geographic Market

New York City Metro

Massachusetts

Canada Metro\*

Vermont

## By Season

Summer

Winter

## By Destination

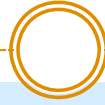
Vermont

Not  
Vermont

\*includes Ottawa, Toronto, and Montreal



# Geographic Market Segmentation



## By Geographic Market

New York City Metro

How do these markets perceive Vermont?

Massachusetts

What differences – or similarities – exist between these markets?

Canada Metro\*

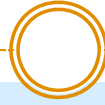
What potential do these markets hold?

Vermont

\*includes Ottawa, Toronto, and Montreal



# Seasonal Market Segmentation



## By Geographic Market

New York City Metro

Massachusetts

Canada Metro\*

Vermont

## By Season

Summer

Do Summer and Winter vacationers view Vermont differently?

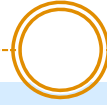
Winter

Is there potential to build a cross-over – 4 season – market?

\*includes Ottawa, Toronto, and Montreal



# Vacationer Market Segmentation



## By Geographic Market

New York City Metro

Massachusetts

Canada Metro\*

Vermont

## By Season

Summer

Winter

## By Destination

**Vermont**

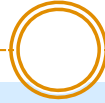
Not  
Vermont

\*includes Ottawa, Toronto, and Montreal





# Meet the Vermont Vacationer



## *More likely than those who don't vacation in Vermont to...*

- Be 31-40, and have a household (HH) size of 2
- Be employed full-time, have a graduate degree, with a HH income \$150K+
- Go to online sources and family & friends for vacation planning information
- Vacation with their spouse and/or friends, stay in a B&B / inn, and stay for 2 nights
- Do outdoor activities on vacation
- Want to be seen as “adventurous”, “outdoorsy”, “spontaneous”, “thrifty”, “independent” and “idealistic”
- View “not crowded” to have similar importance to “good value”, “warm friendly people” and “easy to get to”



Let's go to the New  
York City metro region







**Cultured  
traveler  
looking for a  
longer, luxury  
escape**

## **New York City Metro Vacationers**

- Majority are 41-50 (26%), married (63%), and college educated (65%)
- More likely (than MA, VT) to travel with children and take longer trips (1-2 weeks), and stay in a house/condo (than VT, CAN)
  - More likely (than MA) to spend \$1,000 or more on vacation, participate in cultural activities, and want to be seen as extravagant





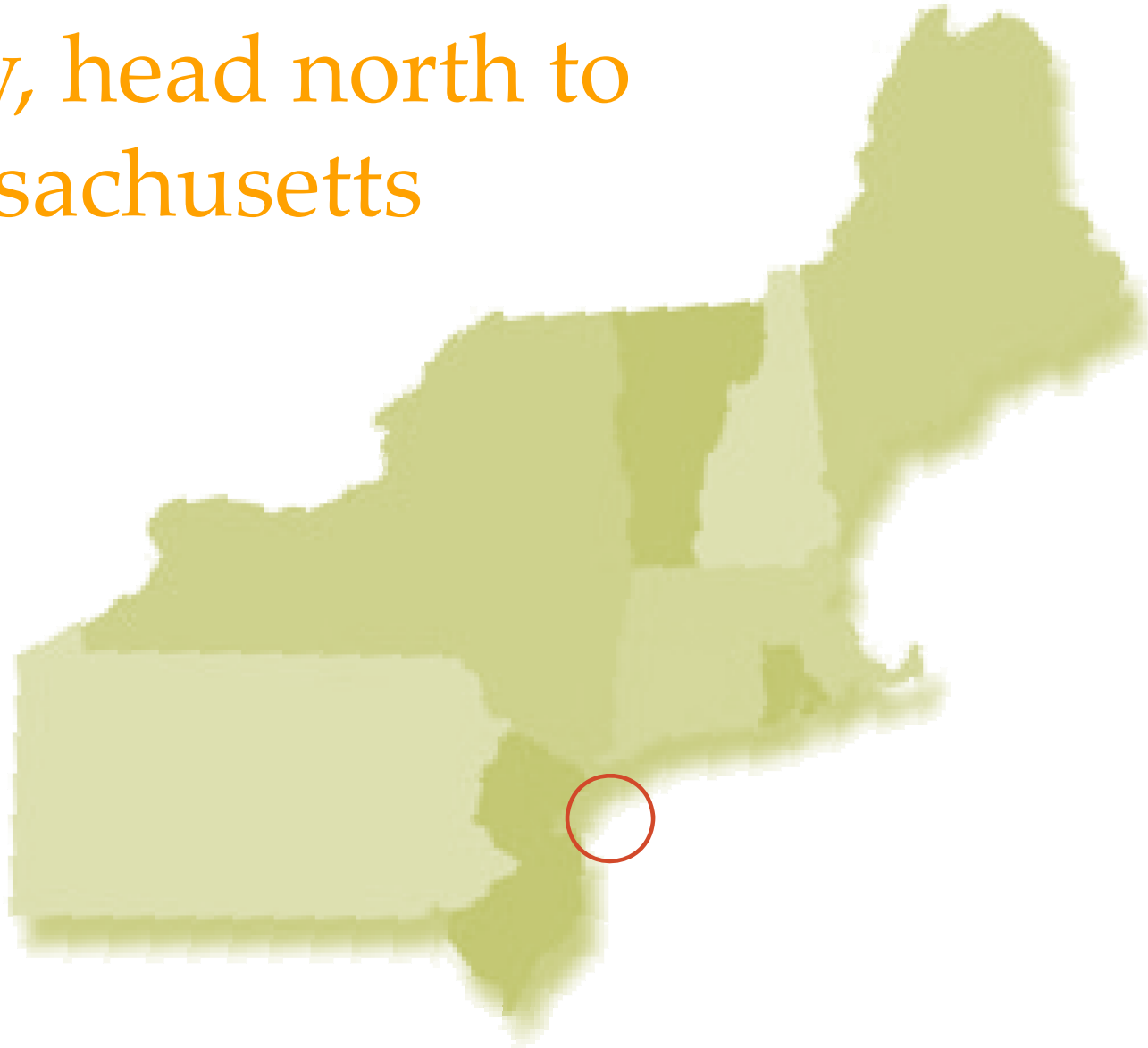
## **New York Metro market**

## **Differences between Vermont and non-Vermont vacationers**

### **New York City metro Vermont vacationers are...**

- Younger and more likely to be married
- Affluent – more likely to have HH income >\$100K, be employed full-time, and hold a grad degree
- Active –more likely to take 2, or 3-6 night trips, travel with spouse or friends, and participate in outdoor activities
- Outgoing - More likely to stay at B&B/Inn and want to be seen as thrifty, youthful, spontaneous, and outdoorsy

Now, head north to  
Massachusetts



Looking for  
practical,  
outdoor,  
short  
getaways



## Massachusetts vacationers

- Majority are 51-60 (28%), married (69%), with a HH size of 2 (42%)
- More likely to take 2 night trips
- More likely (than NY, CAN) to spend \$100-\$300 on vacation and less likely to spend >\$1,000; more likely to spend <\$50 traveling to destination
  - More likely to want to be seen as thrifty (than NY, CAN)
- More likely to participate in outdoor activities and less likely (than NY, CAN) to do cultural activities



Massachusetts  
market

Differences  
between  
Vermont and  
non-Vermont  
vacationers

## Massachusetts Vermont vacationers are...

- Younger - more likely to be 31-40 - and single (25% vs. 17%)
- Professional – More likely to have grad degree and be employed full time
- Active - more likely to take 2 night trips, participate in outdoor activity
- Want to be seen as independent, outdoorsy, and adventurous

# Moving on to Canada's metro regions





## Couples looking for extravagant, extended stays

### Canada metro (Montreal, Toronto, Ottawa)

- Majority are married (66%), with HH size of 2 (39%), and college educated (71%)
- More likely to spend \$1,000+ traveling to destination; spend \$1,000+ at destination (than MA, VT)
- Majority stay 3-6 nights (40%); more likely (than MA, VT) to spend 1-2 weeks
- More likely to want to be seen as spontaneous (than NY, MA), rebellious (than NY), and extravagant (than MA, VT)
- More likely to shop (and majority do so, 70%) and do cultural activities (than MA, VT)
- More likely to use a travel agent and to not have seen Vermont ads



Canadian metro  
market

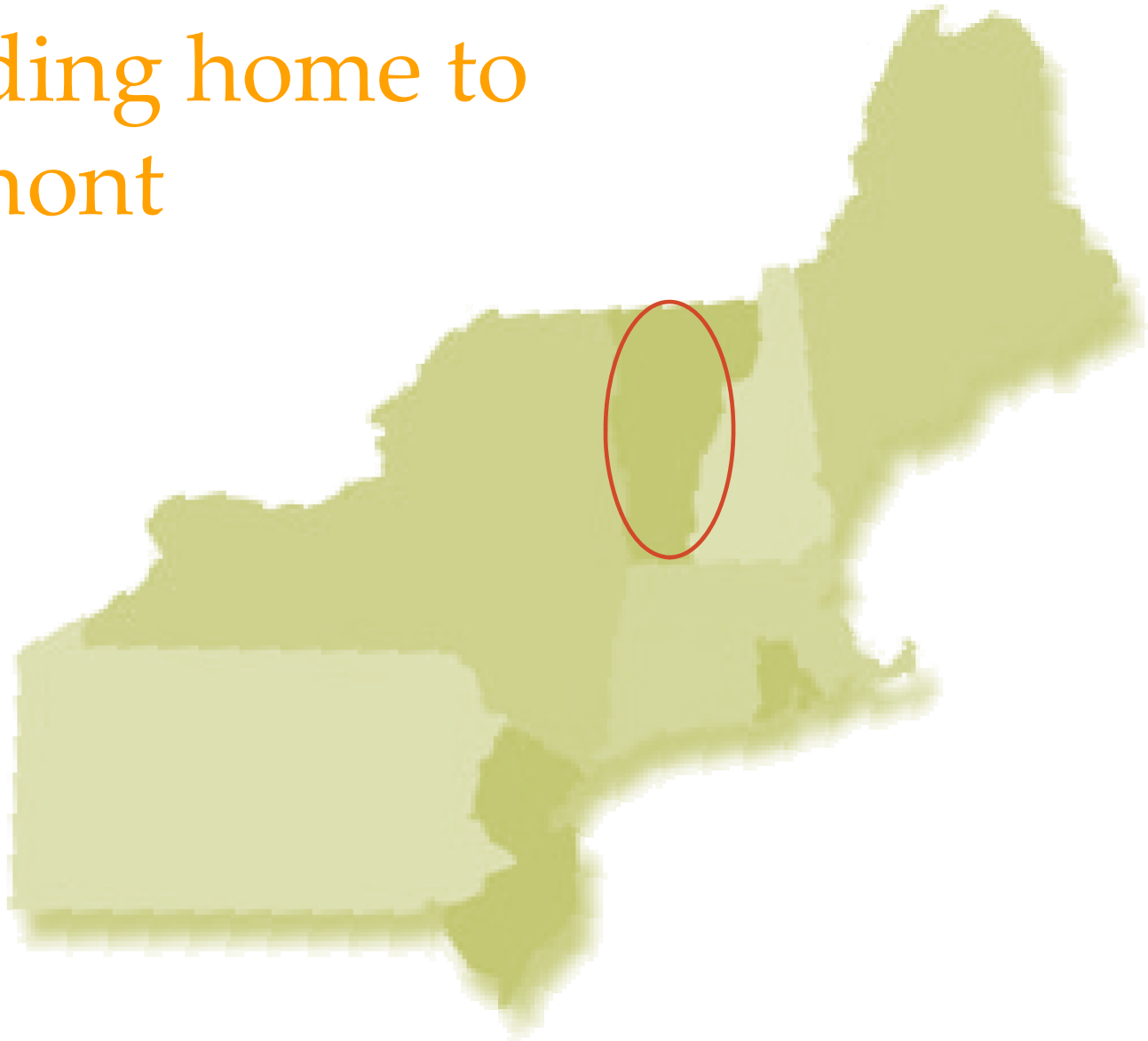
Differences  
between  
Vermont and  
non-Vermont  
vacationers

## Canadian metro Vermont vacationers are...

- Couples - more likely to vacation with a spouse
- More likely to spend less (\$50-\$299) traveling to destination, take 1 night trips, and stay at a B&B/Inn
- More likely to want to be seen as idealistic



# Heading home to Vermont





Looking for  
affordable,  
outdoor  
experiences

## Vermont

- Majority are married (73%) and 51-60 (29%)
- More likely overall to have HH income less than \$50K and not have a grad degree
- More likely to take a day trip (than NY, CAN) or one night vacations; majority stay at hotel (41%)
- More likely to spend \$50-99 at destination
- More likely overall to want to be seen as outdoorsy; and thrifty and natural (than NY, CAN)



Vermont market  
Differences  
between  
Vermont and  
non-Vermont  
vacationers

## **Vermonters who vacation in Vermont are...**

- Young families - more likely to be 31-40 and have a HH size of 3
- More likely to spend less (\$50-\$299) traveling to destination, take 1 night trips, and stay at a B&B/Inn
- More likely to want to be seen as idealistic



## Skier / Rider Profile

Segmentation of the Winter vacationer who skis or rides

*More likely than non-skier/rider to...*

- Be employed full time, have a grad degree, and HH income > \$100K
- Take 2 night trips; majority take 3-6 night trips (43%)
- Travel with children and/or family, stay in a house, and spend \$50 – \$99 traveling
- Want to be seen as youthful, outdoorsy, adventurous
  - Vermont skiers/riders are more likely than non-Vermont skiers/riders to want to be seen as individualistic and adventurous

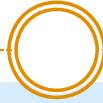


917.43  
V5935h  
1911



917.43  
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1912

# Seasonal differences in vacationer markets



Those who described a winter vacation seem to be younger, more outdoor-oriented and aware of Vermont than those who described a summer vacation.

## Summer Vacationers

*More likely than those who described a winter/spring vacation to...*

- Describe a non-Vermont vacation
- Be 40 or older
- Have only a high school diploma
- Be married/partnered
- Be retired or unemployed
- Have a household income of \$100K or less
- Stay 1 to 2 weeks on vacation
- Vacation with spouse and/or children
- Shop or do cultural activities on vacation
- Want to be seen as “conservative”, “urban”, “rational” and “mature”
- Go to a travel agent for planning
- Not have noticed ads for Vermont

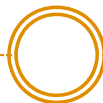
## Winter Vacationers

*More likely than those who described a summer/fall vacation to...*

- Describe a Vermont vacation
- Be from NYC metro or MA
- Be younger than 40
- Be single
- Be employed full-time
- Have a household income of \$100K+
- Stay 2 nights on vacation
- Stay in a house / condo
- Vacation with friends
- Do outdoor activities on vacation
- Want to be seen as “adventurous”, “outdoorsy”, “spontaneous” and “youthful”
- “Unspoiled landscape” is more important
- Go to destination websites for planning



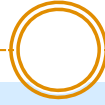
# Potential for building seasonal crossover



Four season visitors are more likely to have easier / inexpensive access to Vermont.

Seasons Vacated in Vermont	MORE Likely Than Other Vermont Vacationers	LESS Likely Than Other Vermont Vacationers
<b>Winter/Spring &amp; Summer/Fall</b> <i>(34% of VT vacationers)</i>	<ul style="list-style-type: none"> <li>Be residents of Vermont and Massachusetts</li> <li>Be 41-50</li> <li>Stay 2 nights</li> <li>Spend \$50 to \$99 traveling to Vermont</li> <li>Want to be seen as “active”, “adventurous” (compared with summer only) and “rational” (compared with winter only)</li> </ul>	<ul style="list-style-type: none"> <li>Be residents of Canada metro</li> <li>Stay at a hotel or motel</li> <li>Spend \$300 to \$999 traveling to Vermont</li> </ul>
<b>Winter/Spring only</b> <i>(34% of VT vacationers)</i>	<ul style="list-style-type: none"> <li>Have HHI under \$100K</li> <li>Want to be seen as “spontaneous”, “passive” (compared with multi-season) and “Youthful” (compared with summer only)</li> </ul>	<ul style="list-style-type: none"> <li>Be residents of Vermont</li> <li>Participate in cultural activities</li> </ul>
<b>Summer/Fall only</b> <i>(32% of VT vacationers)</i>	<ul style="list-style-type: none"> <li>Be residents of Canada metro</li> <li>Be 51 – 60</li> <li>Married</li> <li>Stay at a campground</li> <li>Want to be seen as “conservative” and “passive” (compared with multi-season) and “rational” and “mature” (compared with winter only)</li> <li>Go to commercial travel websites and/or travel agents for vacation planning information</li> </ul>	<ul style="list-style-type: none"> <li>Be single</li> <li>Vacation with friends</li> <li>Stay at house or condo</li> <li>Do outdoor activities</li> <li>Notice ads for Vermont (compared with multi-season)</li> </ul>

# How important are the following attributes?



Easy to get to

Diverse experiences

Good value

Unspoiled landscape

Environmentally –minded

Hearty and healthy

Independent

Good snow-making\*

Natural

Warm/Friendly people

Not crowded

Original/Real

Creative culinary choices

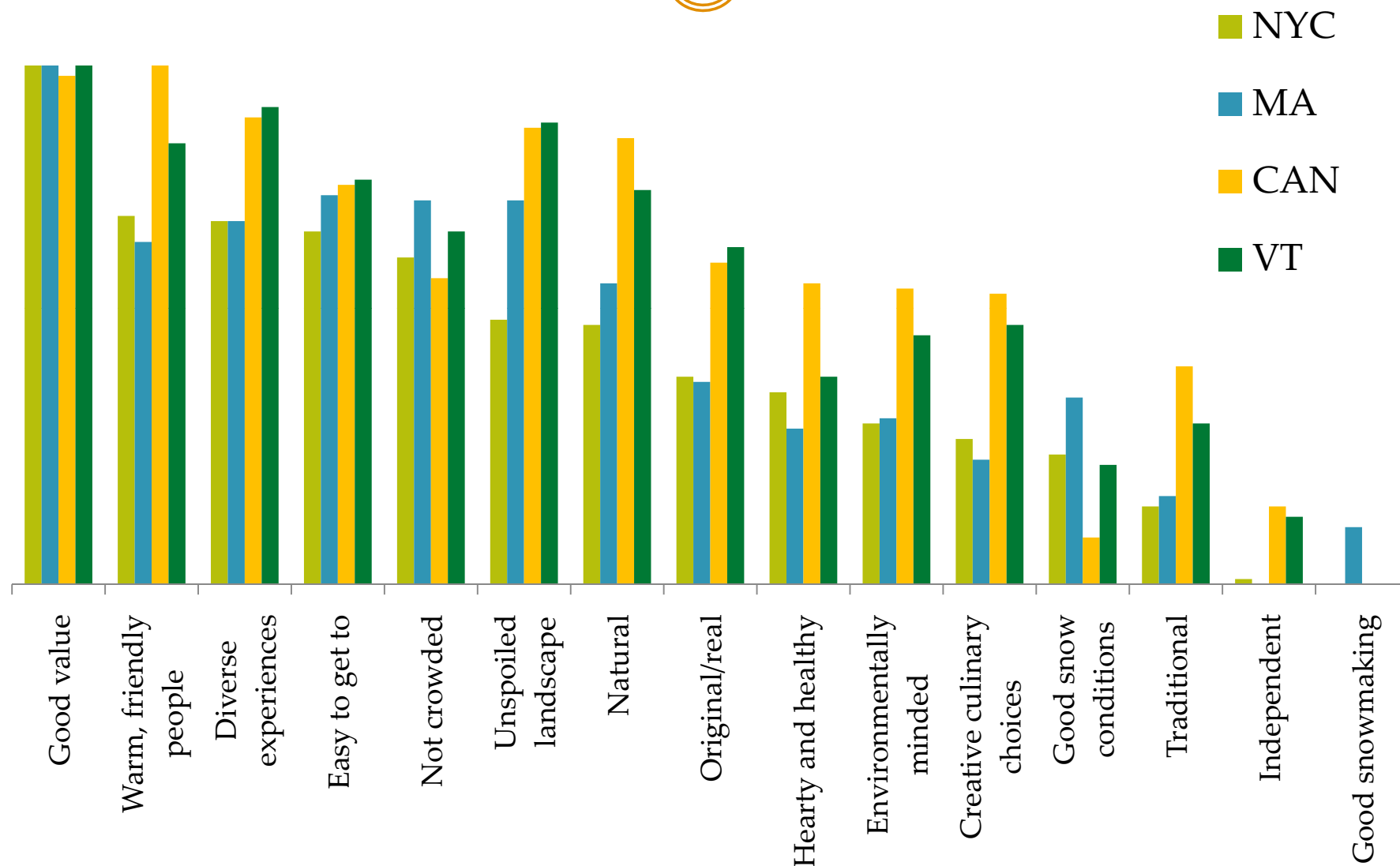
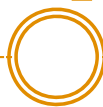
Traditional

Good snow conditions\*

\*Tested for Winter vacationers only



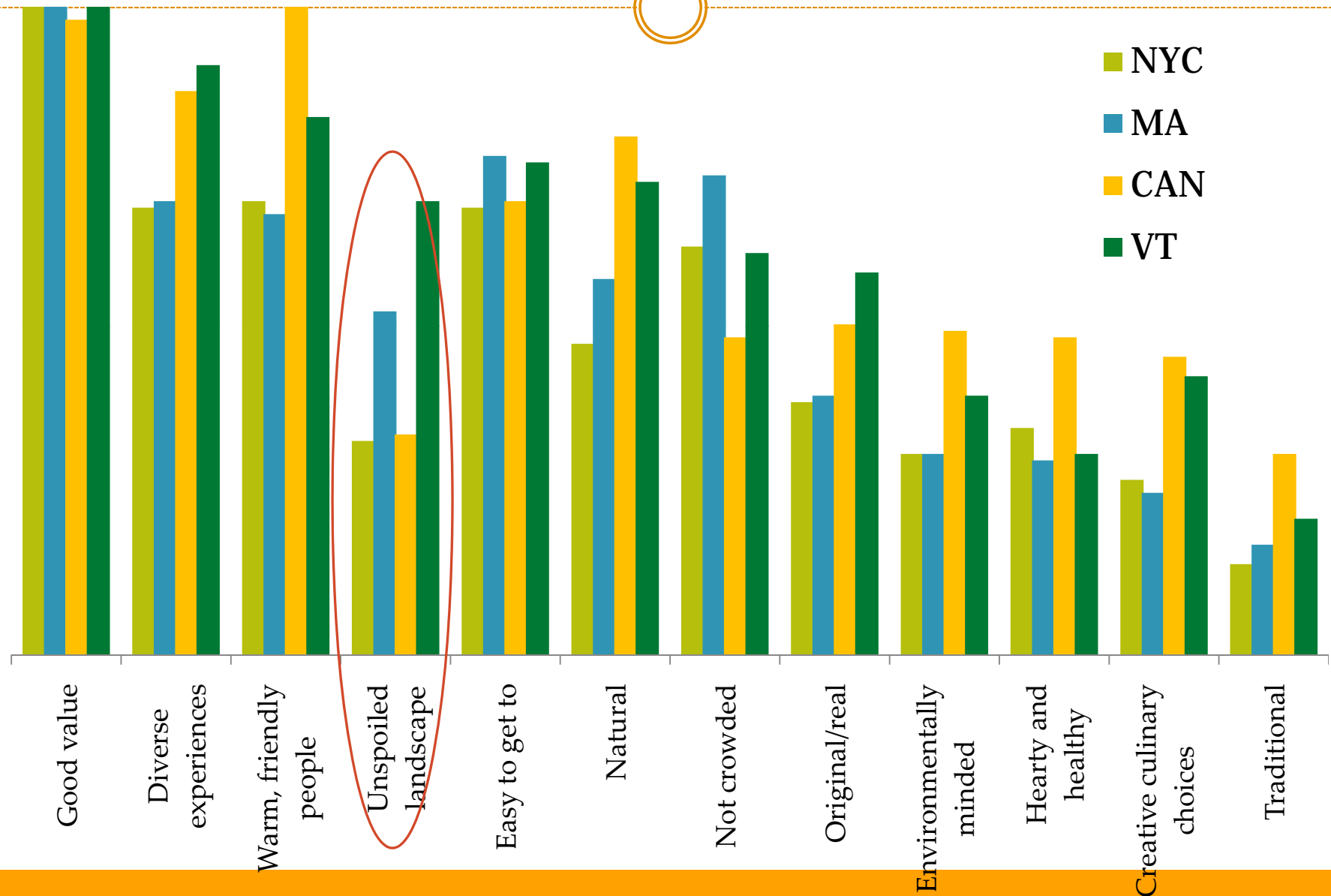
# Relative attribute importance for Winter



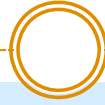
# Important attributes to skiers



# Relative attribute importance for Summer



# Competitive position



How do visitors perceive Vermont and competing vacations destinations in terms of these attributes?

## Competitors

NJ/MD/DE shore

Adirondacks/Upstate NY

New Hampshire

Maine

Eastern Canada

Rocky Mountains

Poconos

West Coast

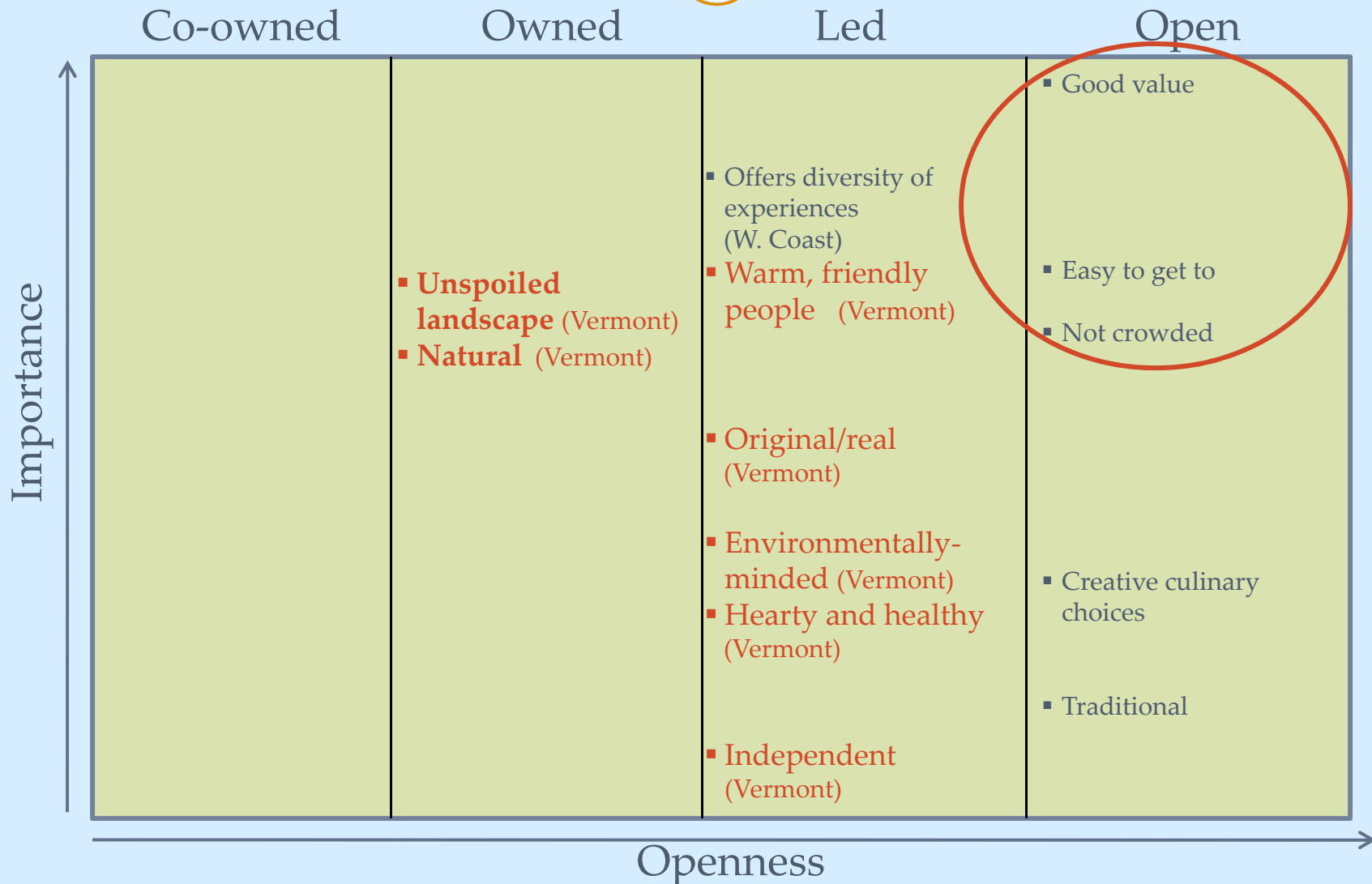
Cape Cod & MA Islands

RI / CT shore

Western Canada

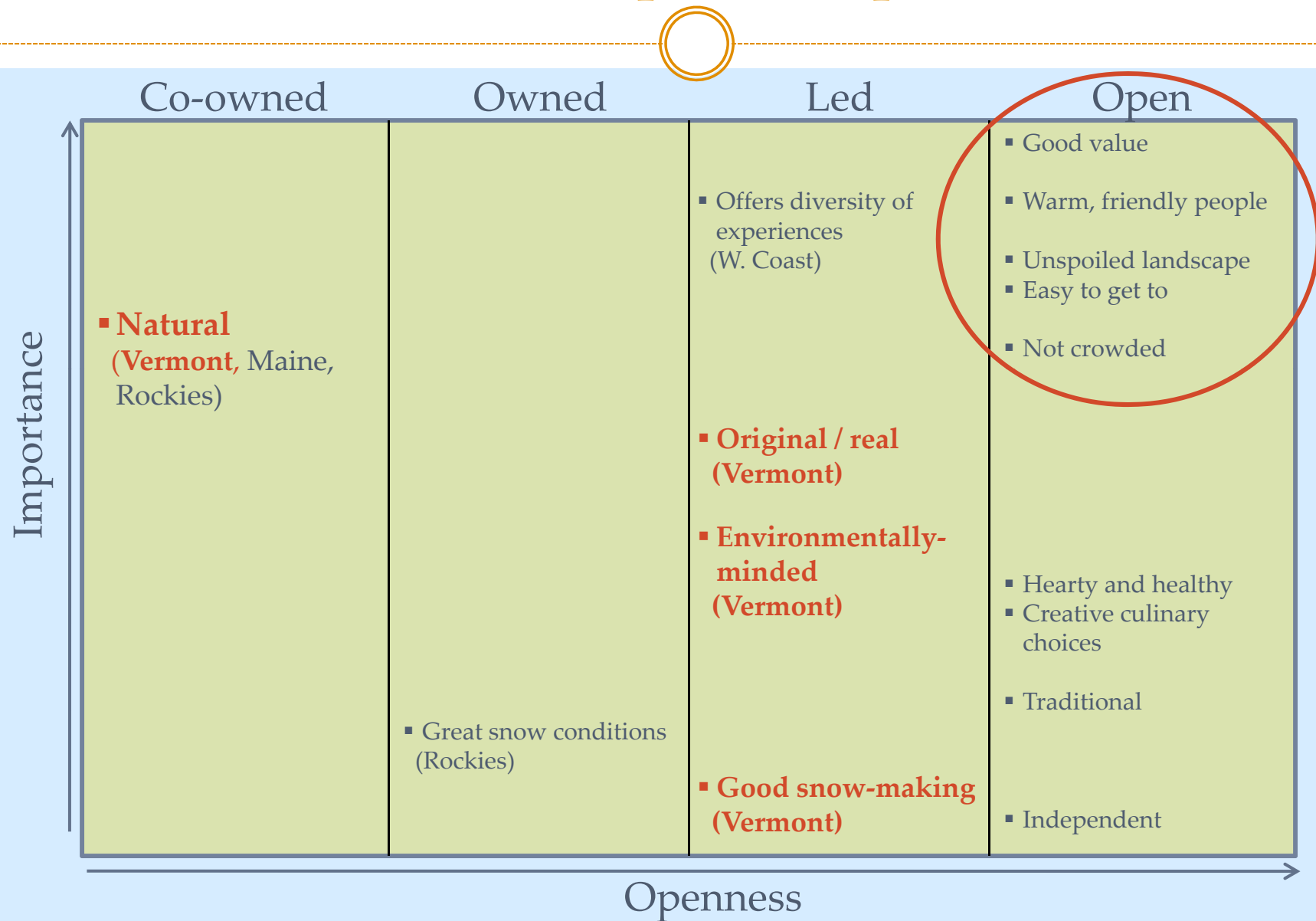
Berkshires

# Overall: competitive position

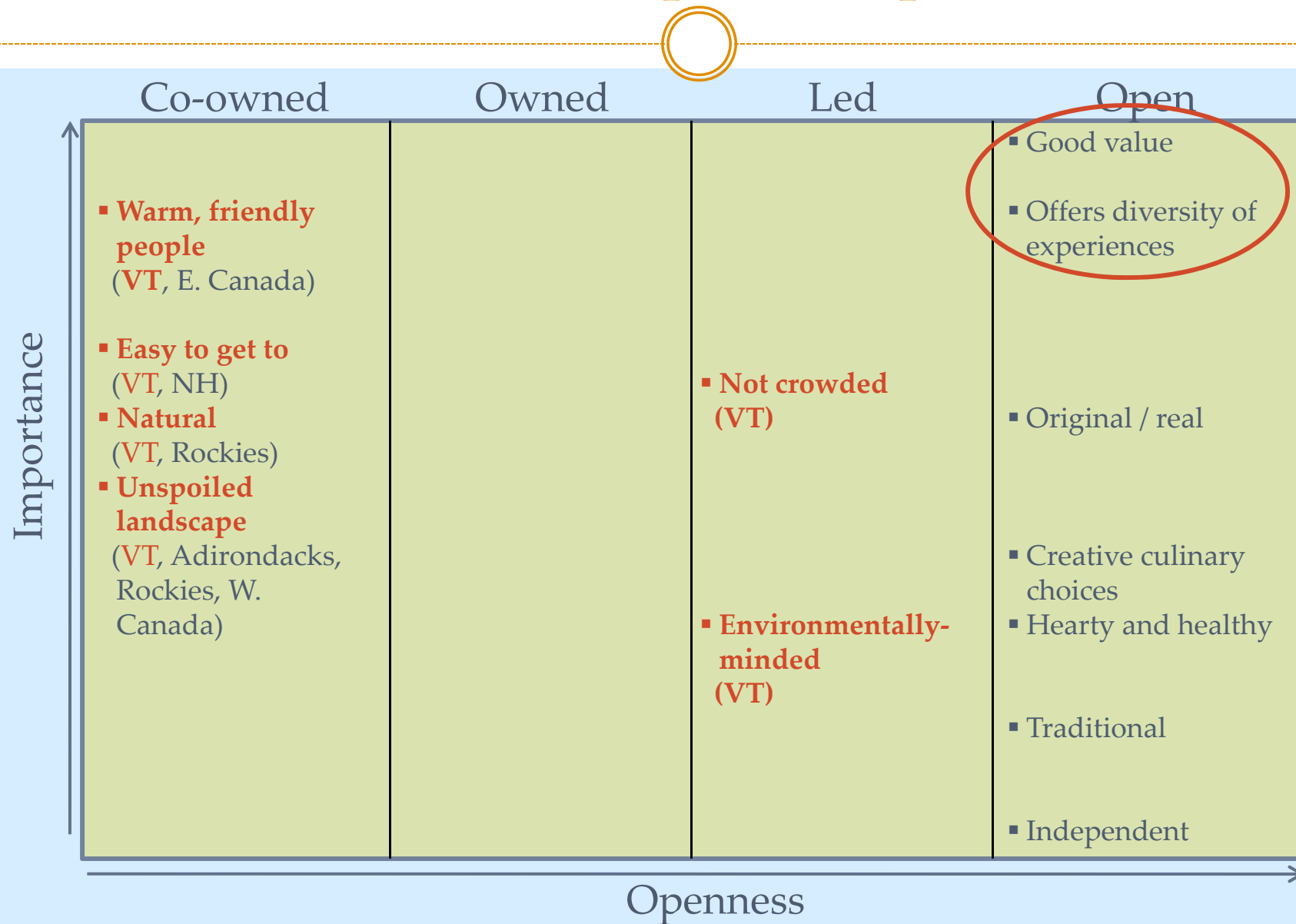


Does not include Provider data

# Winter: competitive position



# Summer: competitive position



# Winter positioning: Connecting with words

## Love Winter.

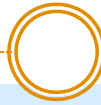
We're Vermonters and we love Winter. Epic Nor'easters. The tingle of cold on our cheeks. Steaming bowls of hot soup. Fresh tracks. Heavy Wool Blankets. We love how winter in Vermont makes us feel and for all the ways there are to enjoy it.



% of respondents who felt the word was relevant / not relevant to Vermont

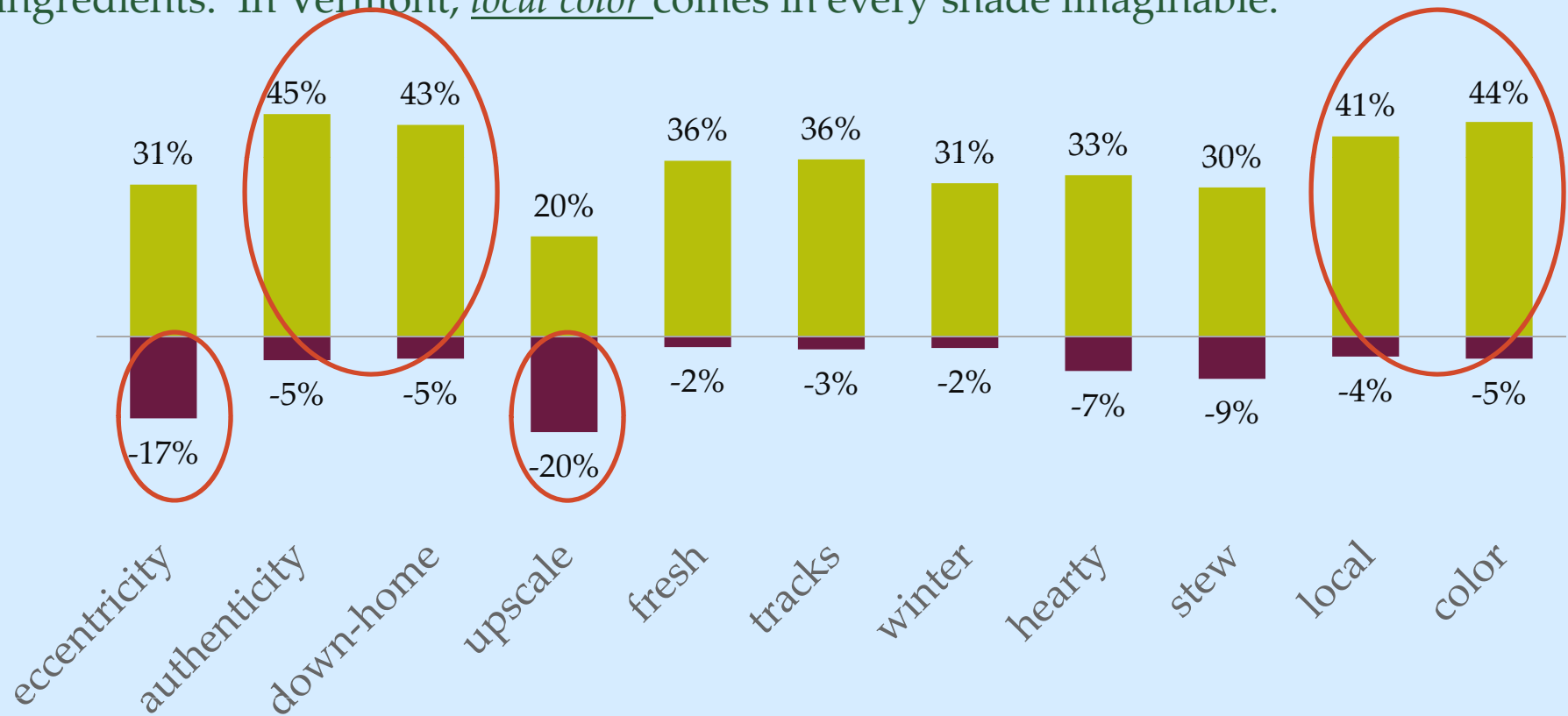






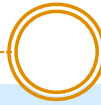
## Vermont Winter. It's all True.

Whether you like *eccentricity* or *authenticity*, *down-home* or *upscale*, fresh tracks or fresh ideas, winter in Vermont is a hearty stew to which everyone gets to add their own ingredients. In Vermont, *local color* comes in every shade imaginable.



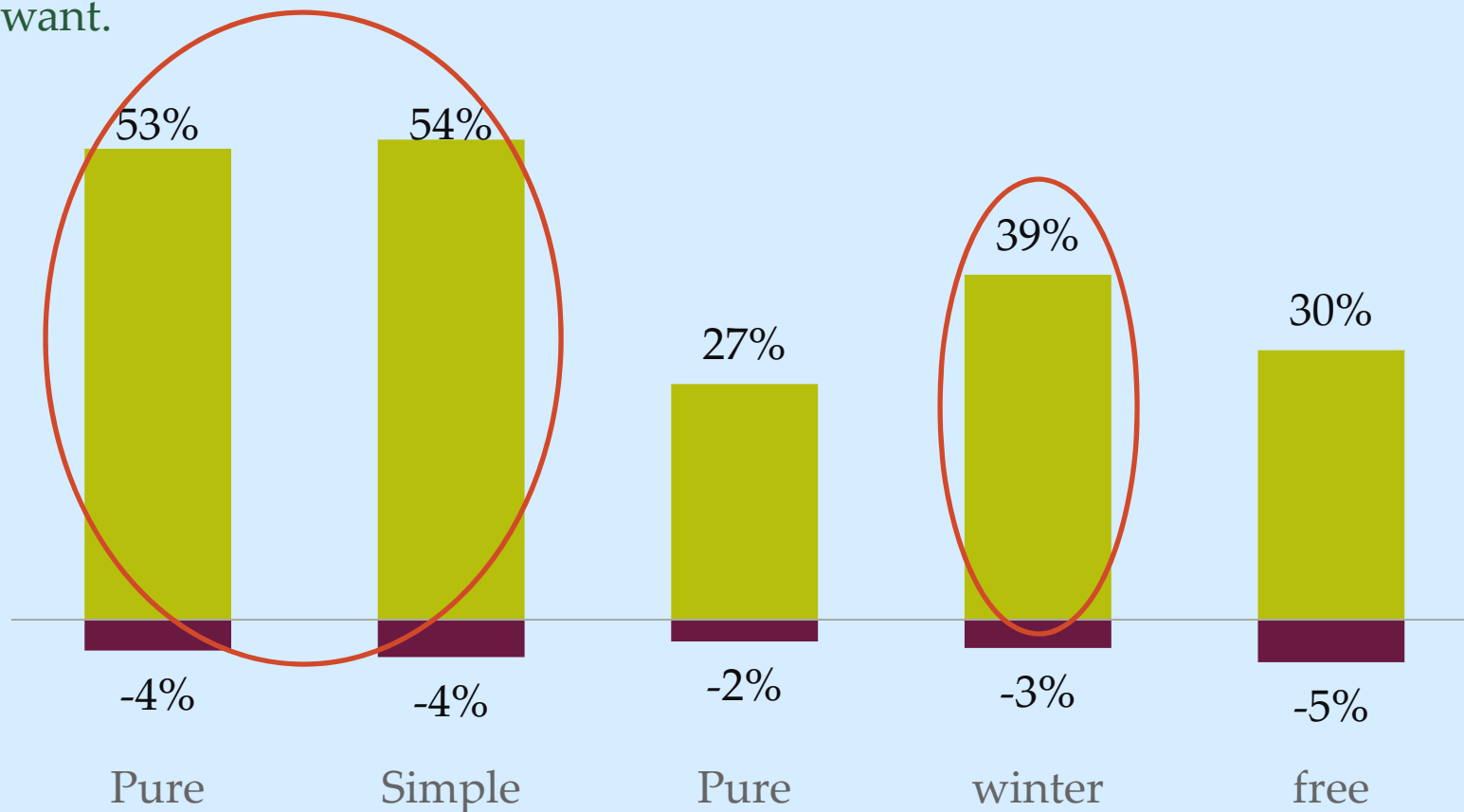
% of respondents who felt the word was relevant / not relevant to VT





## Vermont Winter. *Pure and Simple.*

Pure and simple, Vermont *winter* is the best of everything you remember combined with the best of what's to come. Where you're free to come as you are and be who you want.



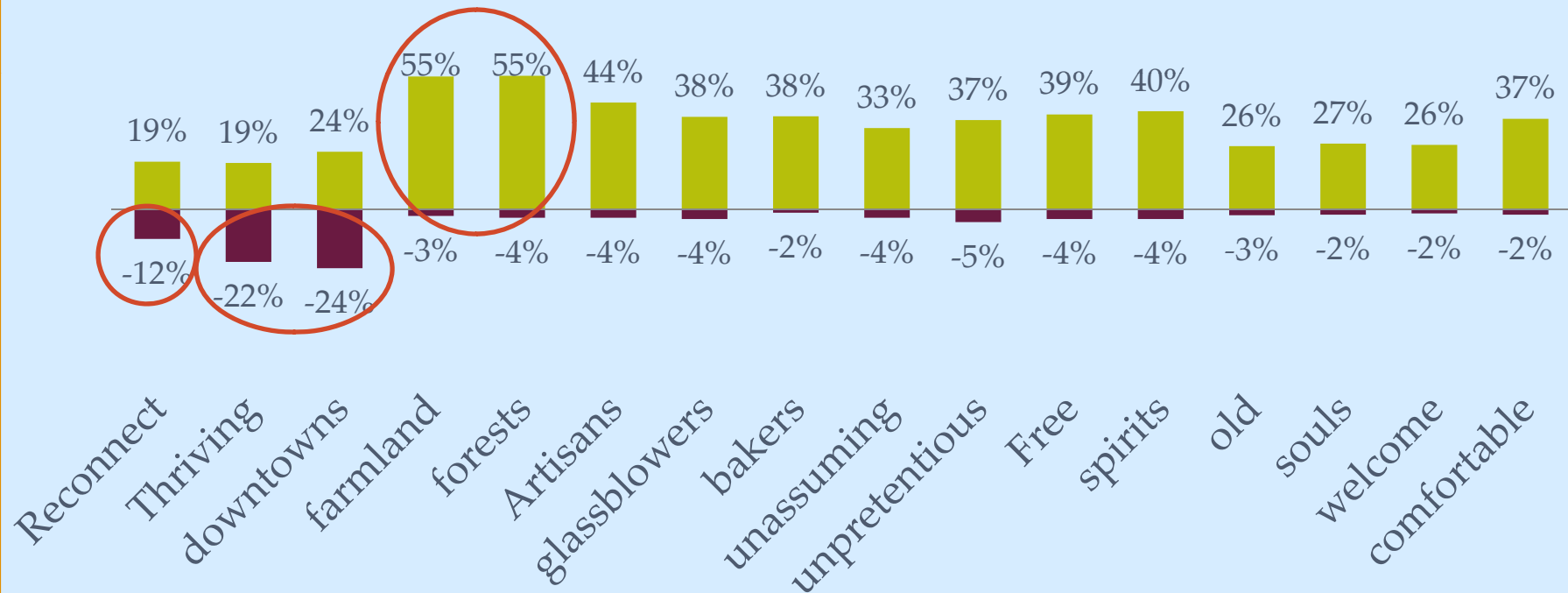
% of respondents who felt the word was relevant / not relevant to VT



# Summer positioning: Connecting with words

## Vermont. Reconnect.

Thriving downtowns blend seamlessly into farmland and forests. Artisans, from glassblowers to bakers, greet visitors, unassuming and unpretentious. Free spirits and old souls are equally welcome, and equally comfortable. It's about connecting, and you'll find it in Vermont.



% of respondents who felt the word was  
relevant / not relevant to Vermont

# Summer positioning: Connecting with words

## Unhurried Summer.

Summer in Vermont means wading in a cool stream. Casting for lake trout. Reading on a sun-drenched dock. Kayaking among loons. Savoring a sweet strawberry. Counting the stars. Find yourself in Vermont.

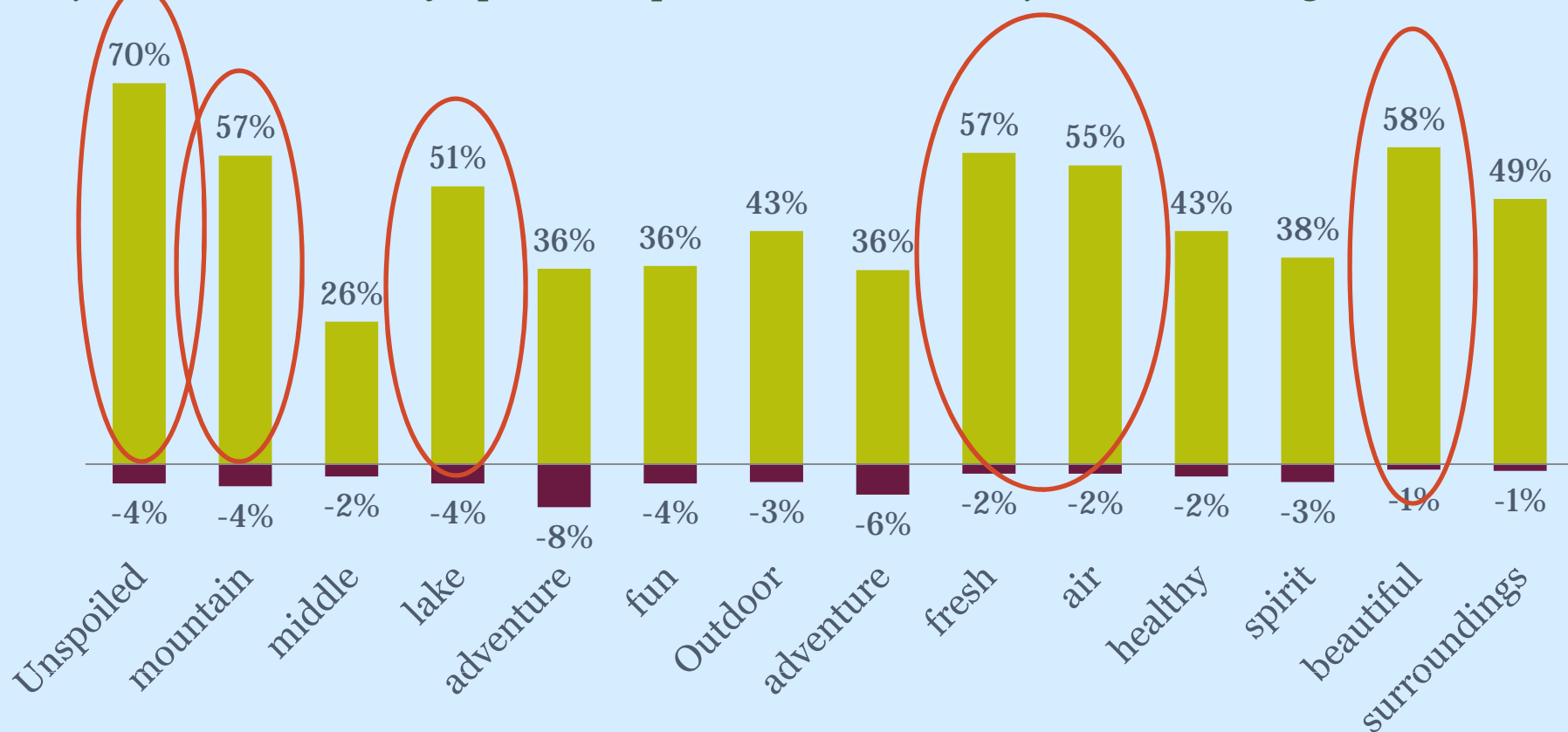


% of respondents who felt the word was  
relevant / not relevant to Vermont

# Summer positioning: Connecting with words

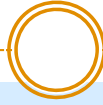
## Vermont. *Unspoiled.*

On top of a mountain or in the middle of a lake, you can find adventure and fun. Outdoor adventure never gets old here. You can play every day and never tire of the fresh air and healthy spirit that permeates our beautiful surroundings.



% of respondents who felt the word was  
relevant / not relevant to Vermont

# Developing messages



## Words / Phrases To Use

### *Emotions*

- Pure and Simple
- Unhurried
- Unspoiled

### *Sense of place*

- Farmland and forests
- Mountains and lakes
- Fresh air
- Fresh tracks
- Beautiful

### *Culture*

- Down home
- Local color
- Authenticity

## Words / Phrases To Avoid

### *Emotions*

- Reconnect

### *Sense of place*

- Sun-drenched dock
- Kayaking
- Strawberry
- Thriving downtowns
- Nor'easters

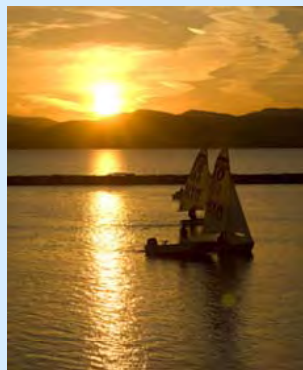
### *Culture*

- Upscale
- Eccentricity

# Types of imagery associated with Vermont Summer

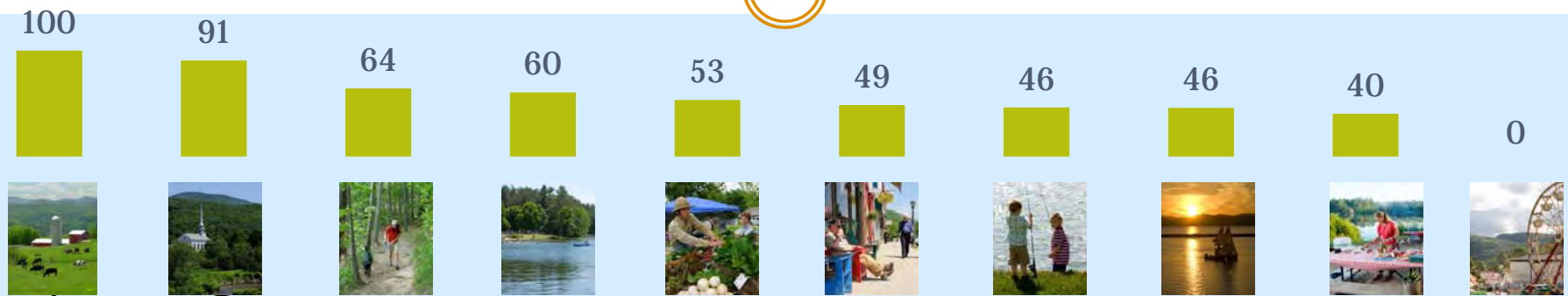


A mix of summer iconic, activity, and people image types were tested.





# Iconic images are strongly associated with Vermont



Scale = relative degree of representation

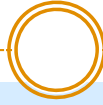
Most representative of Vermont

2<sup>nd</sup> most representative of Vermont





# However, perceptions still vary by region

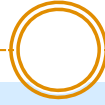


*This farmers' market image was selected by Massachusetts summer vacationers as more representative than cows and red barn.*



*These images depicting summer activity (with a sense of place) were chosen as second and third most representative by NYC summer vacationers – over the valley and white steeple.*

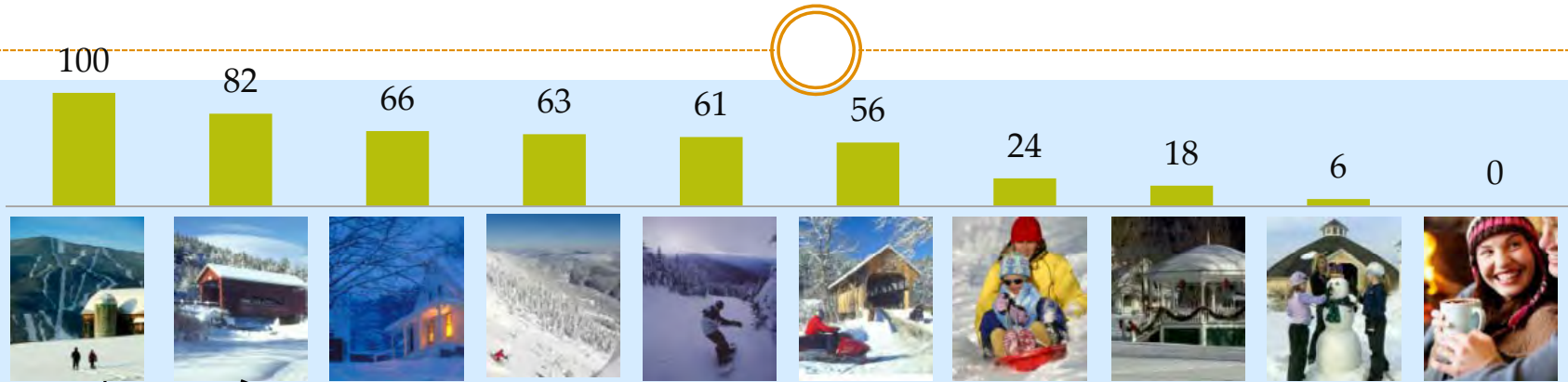
# Types of imagery associated with Vermont Winter



A mix of winter iconic, activity, and people image types were tested.



# Iconic images are strong identity for VT Winter



Scale = relative degree of importance

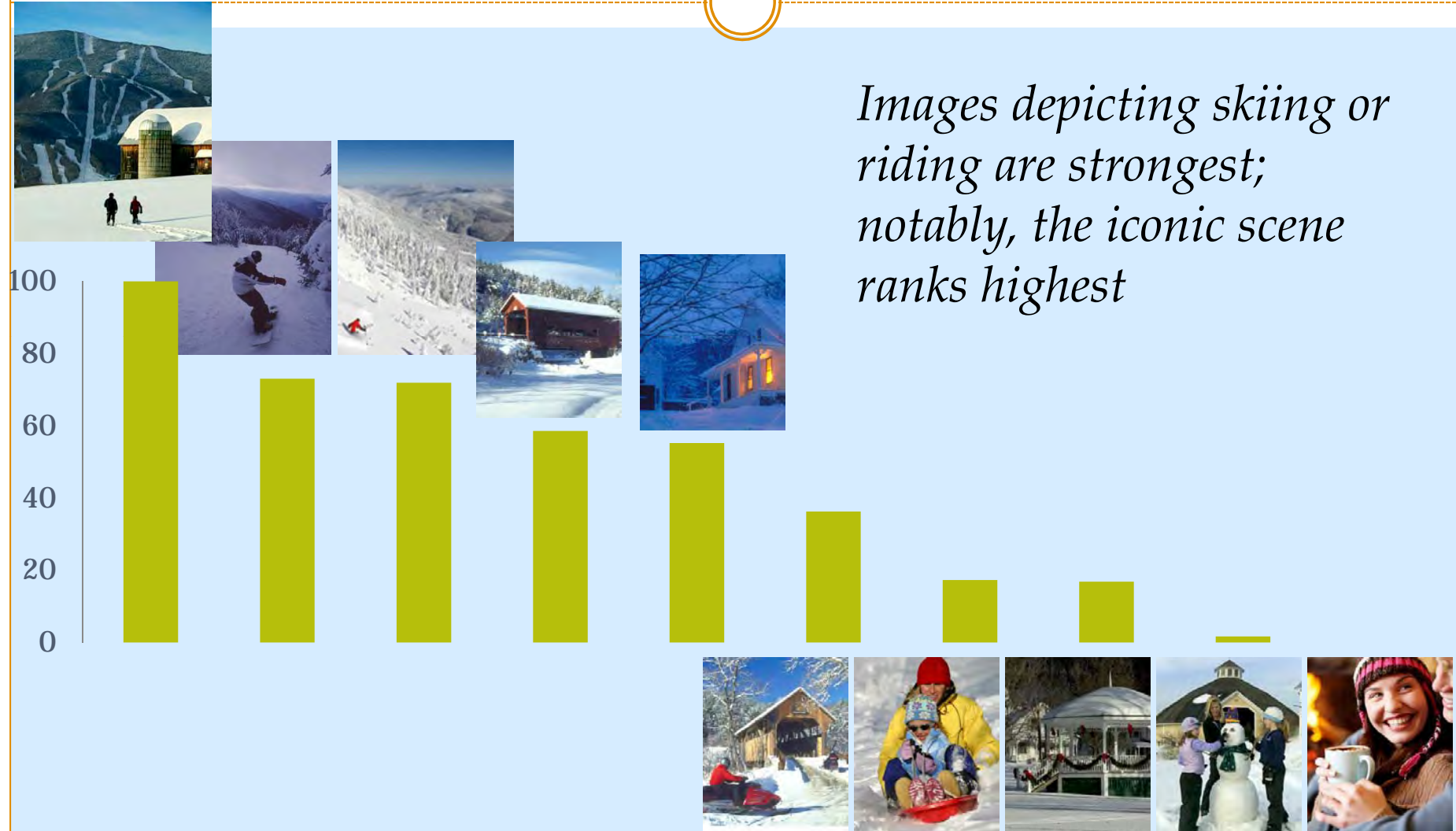
Most Relevant to VT

2<sup>nd</sup> Most Relevant to VT





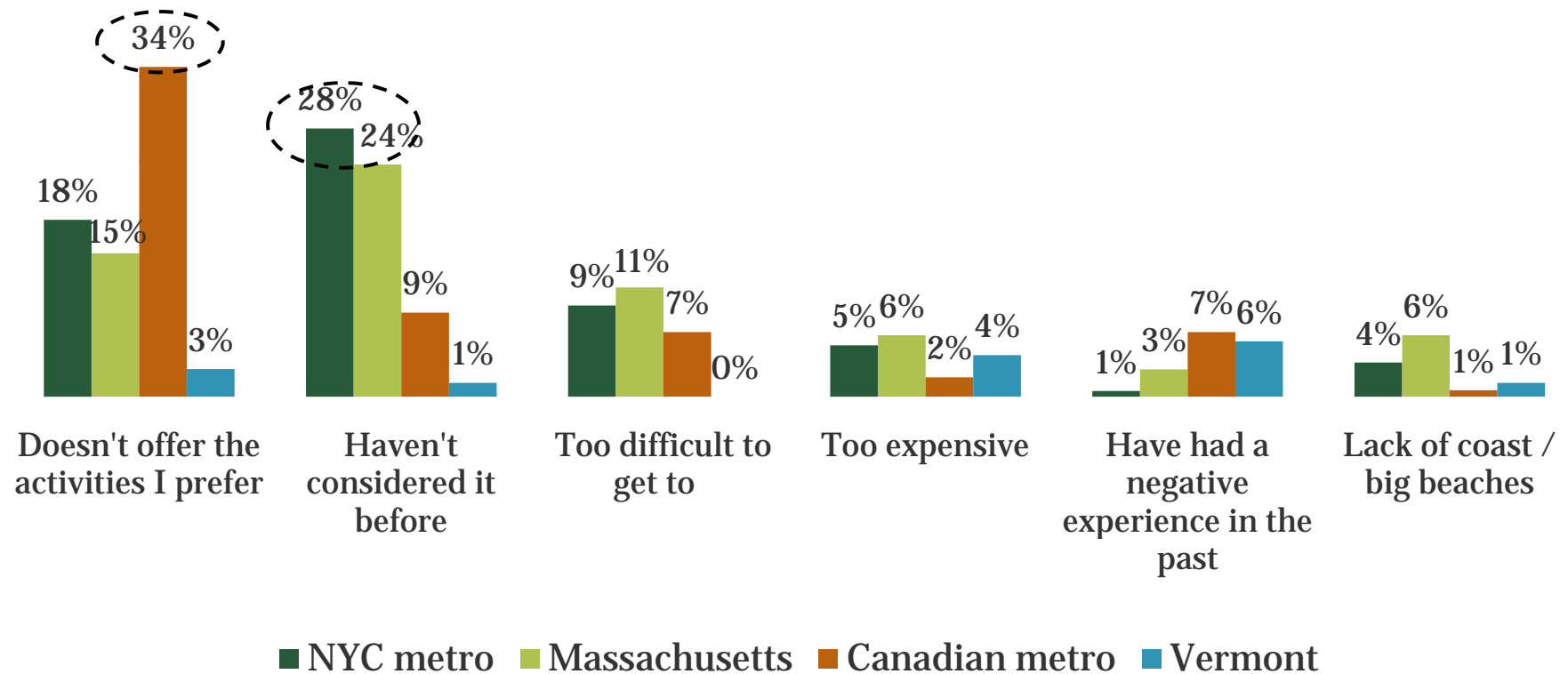
# Skier perceptions of Vermont



# Primary reasons for not visiting Vermont



About a quarter of NYC metro and Massachusetts residents who have not vacationed in Vermont, have not done so because they “haven’t considered it before”, while a third of Canadians feel Vermont “doesn’t offer the activities I prefer”.



Reasons that received less than 5% responses include: lack of nightlife, too cold, inconsistent availability of wireless coverage/service, unpredictable snow conditions, have heard negative things about it, unpredictable weather conditions

# Those haven't considered Vermont



Those who haven't considered vacationing in Vermont seem to prefer the shore, are younger and less educated. Specifically, they are different from other non-VT vacationers in that they are...

## *Vacations*

- More likely to go to the Cape and Mid-Atlantic shore but less likely to have vacationed in ME
- More likely to go to family and friends as a vacation planning resource

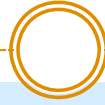
## *Demographics & Attitudes*

- More likely to be unemployed, have a high school diploma or GED, less than 50
- More likely to want to be seen as "adventurous"

## *Vermont Awareness from Ads*

- No difference in awareness of Vermont ads

# Recommendations



- Target your marketing to regional preferences
  - Match your unique qualities to the market
    - Recreational activity -> MA and VT
    - High-end properties -> NYC and CAN
- Identify the benefits and attributes that you offer and match them to visitor needs
  - Highlight good value and diverse experiences
  - Build a list of keywords that trigger an association with Vermont
  - Use images that convey a strong sense of place
    - Balance with images and content that show activity

# *Legacy*



*What will your legacy be?*



# Thank You



Find more information at:

[www.cmo.vermont.gov](http://www.cmo.vermont.gov)  
[www.vermontpartners.org](http://www.vermontpartners.org)