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
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
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

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

Advertising impact

Vermont vacationers are evenly split across types of seasonal visitor.

% of vacationers who have NOT noticed VT ads

- 62% of vacationers who have not vacationed in VT
- 25% of vacationers who have vacationed in VT
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
Winter

Do Summer and Winter vacationers view Vermont differently?
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
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 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
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

Looking for practical, outdoor, short getaways
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
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 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
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)

Looking for affordable, outdoor experiences
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
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
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.

<table>
<thead>
<tr>
<th>Seasons Vacationed in Vermont</th>
<th>MORE Likely Than Other Vermont Vacationers</th>
<th>LESS Likely Than Other Vermont Vacationers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winter/Spring &amp; Summer/Fall</td>
<td>▪ Be residents of Vermont and Massachusetts</td>
<td>▪ Be residents of Canada metro</td>
</tr>
<tr>
<td>(34% of VT vacationers)</td>
<td>▪ Be 41-50</td>
<td>▪ Stay at a hotel or motel</td>
</tr>
<tr>
<td></td>
<td>▪ Stay 2 nights</td>
<td>▪ Spend $300 to $999 traveling to Vermont</td>
</tr>
<tr>
<td></td>
<td>▪ Spend $50 to $99 traveling to Vermont</td>
<td>▪ Want to be seen as “active”, “adventurous” (compared with summer only) and “rational” (compared with winter only)</td>
</tr>
<tr>
<td></td>
<td>▪ Want to be seen as “active”, “adventurous” (compared with summer only) and “rational” (compared with winter only)</td>
<td>▪ Want to be seen as “conservative” and “passive” (compared with multi-season) and “Youthful” (compared with summer only)</td>
</tr>
<tr>
<td>Winter/Spring only</td>
<td>▪ Have HHI under $100K</td>
<td>▪ Be residents of Vermont</td>
</tr>
<tr>
<td>(34% of VT vacationers)</td>
<td>▪ Want to be seen as “spontaneous”, “passive” (compared with multi-season) and “Youthful” (compared with summer only)</td>
<td>▪ Participate in cultural activities</td>
</tr>
<tr>
<td>Summer/Fall only</td>
<td>▪ Be residents of Canada metro</td>
<td>▪ Be single</td>
</tr>
<tr>
<td>(32% of VT vacationers)</td>
<td>▪ Be 51 – 60</td>
<td>▪ Vacation with friends</td>
</tr>
<tr>
<td></td>
<td>▪ Married</td>
<td>▪ Stay at house or condo</td>
</tr>
<tr>
<td></td>
<td>▪ Stay at a campground</td>
<td>▪ Do outdoor activities</td>
</tr>
<tr>
<td></td>
<td>▪ Want to be seen as “conservative” and “passive” (compared with multi-season) and “rational” and “mature” (compared with winter only)</td>
<td>▪ Notice ads for Vermont (compared with multi-season)</td>
</tr>
<tr>
<td></td>
<td>▪ Go to commercial travel websites and/or travel agents for vacation planning information</td>
<td></td>
</tr>
<tr>
<td>Easy to get to</td>
<td>Natural</td>
<td></td>
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<tr>
<td>---------------------</td>
<td>------------------</td>
<td></td>
</tr>
<tr>
<td>Diverse experiences</td>
<td>Warm/Friendly people</td>
<td></td>
</tr>
<tr>
<td>Good value</td>
<td>Not crowded</td>
<td></td>
</tr>
<tr>
<td>Unspoiled landscape</td>
<td>Original/Real</td>
<td></td>
</tr>
<tr>
<td>Environmentally –minded</td>
<td>Creative culinary choices</td>
<td></td>
</tr>
<tr>
<td>Hearty and healthy</td>
<td>Traditional</td>
<td></td>
</tr>
<tr>
<td>Independent</td>
<td>Good snow conditions*</td>
<td></td>
</tr>
<tr>
<td>Good snow-making*</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Tested for Winter vacationers only
Relative attribute importance for Winter

- Good value
- Warm, friendly people
- Diverse experiences
- Easy to get to
- Not crowded
- Unspoiled landscape
- Natural
- Original/real
- Hearty and healthy
- Environmentally minded
- Creative culinary choices
- Good snow conditions
- Traditional
- Independent
- Good snowmaking

- NYC
- MA
- CAN
- VT
Important attributes to skiers

- Great snow conditions: 100
- Good value: 82
- Not crowded: 62
- Easy to get to: 60
- Good snow-making: 60
- Unspoiled landscape: 54
- Warm, friendly people: 52
- Natural: 48
- Offers diversity of experiences: 46
- Environmentally-minded: 33
- Original / Real: 29
- Hearty and healthy: 24
- Creative culinary choices: 20
- Traditional: 12
- Independent: 0
Relative attribute importance for Summer

- Good value
- Diverse experiences
- Warm, friendly people
- Unspoiled landscape
- Easy to get to
- Natural
- Not crowded
- Original/real
- Environmentally minded
- Hearty and healthy
- Creative culinary choices
- Traditional

Legend:
- NYC
- MA
- CAN
- VT
### Competitive position

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

<table>
<thead>
<tr>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>NJ/MD/DE shore</td>
</tr>
<tr>
<td>Adirondacks/Upstate NY</td>
</tr>
<tr>
<td>New Hampshire</td>
</tr>
<tr>
<td>Maine</td>
</tr>
<tr>
<td>Eastern Canada</td>
</tr>
<tr>
<td>Rocky Mountains</td>
</tr>
</tbody>
</table>
Overall: competitive position

- **Co-owned**
  - Unspoiled landscape (Vermont)
  - Natural (Vermont)

- **Owned**
  - Offers diversity of experiences (W. Coast)
  - Warm, friendly people (Vermont)
  - Original/real (Vermont)
  - Environmentally-minded (Vermont)
  - Hearty and healthy (Vermont)
  - Independent (Vermont)

- **Led**
  - Good value
  - Easy to get to
  - Not crowded
  - Creative culinary choices
  - Traditional

- **Open**
  - Unspoiled landscape (Vermont)
  - Natural (Vermont)

*Does not include Provider data*
Winter: competitive position

- **Natural** (Vermont, Maine, Rockies)
  - Great snow conditions (Rockies)
- **Owned**
  - Offers diversity of experiences (W. Coast)
  - Original / real (Vermont)
  - Environmentally-minded (Vermont)
  - Good snow-making (Vermont)
- **Led**
  - Hearty and healthy
  - Creative culinary choices
  - Independent
- **Open**
  - Good value
  - Warm, friendly people
  - Unspoiled landscape
  - Easy to get to
  - Not crowded

Importance

Openness
### Summer: competitive position

<table>
<thead>
<tr>
<th>Importance</th>
<th>Co-owned</th>
<th>Owned</th>
<th>Led</th>
<th>Open</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warm, friendly people</td>
<td></td>
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<td></td>
<td>- Good value</td>
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<td>Easy to get to</td>
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<td>Unspoiled landscape</td>
<td></td>
<td></td>
<td>- Creative culinary choices</td>
<td></td>
</tr>
<tr>
<td>(VT, E. Canada)</td>
<td></td>
<td></td>
<td>- Hearty and healthy</td>
<td></td>
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<tr>
<td>(VT, NH)</td>
<td></td>
<td></td>
<td>- Traditional</td>
<td></td>
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<tr>
<td>(VT, Rockies)</td>
<td></td>
<td></td>
<td>- Independent</td>
<td></td>
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<tr>
<td>(VT, Adirondacks, Rockies, W. Canada)</td>
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</tbody>
</table>

- Environmentally-minded (VT)
Love Winter.
We’re Vermonter 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.
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.
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.

<table>
<thead>
<tr>
<th>Word</th>
<th>Reconnect</th>
<th>Thriving</th>
<th>downtowns</th>
<th>farmland</th>
<th>forests</th>
<th>Artisans</th>
<th>glassblowers</th>
<th>bakers</th>
<th>unassuming</th>
<th>unpretentious</th>
<th>Free</th>
<th>spirits</th>
<th>old</th>
<th>souls</th>
<th>welcome</th>
<th>comfortable</th>
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</thead>
<tbody>
<tr>
<td>% of respondents who felt the word was relevant / not relevant to Vermont</td>
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</table>

% of respondents who felt the word was relevant / not relevant to Vermont
Summer positioning: Connecting with words

**Unhurried Summer.**

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

Unspoiled: 70%

mountain: 57%

middle: 26%

lake: 51%

adventure: 36%

fun: 36%

Outdoor: 43%

adventure: 36%

fresh: 57%

air: 55%

healthy: 43%

spirit: 38%

beautiful: 58%

surroundings: 49%
## Developing messages

<table>
<thead>
<tr>
<th>Words / Phrases To Use</th>
<th>Words / Phrases To Avoid</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Emotions</strong></td>
<td></td>
</tr>
<tr>
<td>- Pure and Simple</td>
<td>- Reconnect</td>
</tr>
<tr>
<td>- Unhurried</td>
<td></td>
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<tr>
<td>- Unspoiled</td>
<td></td>
</tr>
<tr>
<td><strong>Sense of place</strong></td>
<td></td>
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<tr>
<td>- Farmland and forests</td>
<td>- Sun-drenched dock</td>
</tr>
<tr>
<td>- Mountains and lakes</td>
<td>- Kayaking</td>
</tr>
<tr>
<td>- Fresh air</td>
<td>- Strawberry</td>
</tr>
<tr>
<td>- Fresh tracks</td>
<td>- Thriving downtowns</td>
</tr>
<tr>
<td>- Beautiful</td>
<td>- Nor’easters</td>
</tr>
<tr>
<td><strong>Culture</strong></td>
<td></td>
</tr>
<tr>
<td>- Down home</td>
<td>- Upscale</td>
</tr>
<tr>
<td>- Local color</td>
<td>- Eccentricity</td>
</tr>
<tr>
<td>- Authenticity</td>
<td></td>
</tr>
</tbody>
</table>
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

Most representative of Vermont

2nd most representative of Vermont

Scale = relative degree of representation
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

2nd Most Relevant to VT
Skier perceptions of Vermont

Images depicting skiing or riding are strongest; notably, the iconic scene ranks highest.
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
www.vermontpartners.org