

The VERMONT Brand

Final Report

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O'Neal Strategy Group

HARTFORD • NEW YORK • DALLAS • ORANGE COUNTY

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OVERVIEW

OVERVIEW

✍️ In 1997, the Governor's Travel & Recreational Council called for a re-examination of the Vermont brand to:

- Identify and build a strong brand identity for Vermont that will provide differentiation and competitive advantage for the future.

✍️ Since then the State of Vermont has undertaken two major branding initiatives:

- 1998 Tourism Brand Review (Vermont's brand identity as a place to visit).
- 2000 Business Brand Review (Vermont's brand identity as a place to do business).

✍️ This latest brand review was initiated in April 2003 by the agencies and departments making up the state's Marketing And Promotion Team (M.A.P.).

✍️ The review was initiated to develop a brand identity strategy that could be used by all state agencies and departments to promote Vermont.

✍️ It is recognized that a unified brand identity is the key to better coordination of marketing efforts, which, in turn, is the key to competing more effectively with larger, better-funded marketing efforts of other states.

VALUE OF A STRONG SINGULAR BRAND

- ✍✍ A brand is a set of strong associations people have with a product, place of service. Brands exist in peoples' minds, not in the product, place or service itself.
- ✍✍ These associations are really expectations people have for that product, place or service. As long as the brand satisfies those expectations, the purchaser need not bother examining other options.
- ✍✍ That's the power of brands. In a world of too many choices and too many claims, brands simplify things for people.
- ✍✍ Brands reduce the friction of marketing – and therefore the cost (it's all about making the marketing dollars go further).
- ✍✍ That's why many brands are valued in the hundreds of millions of dollars (Coca Cola's brand value is placed at over \$1 Billion).
- ✍✍ Some of the biggest brands in America are places (Silicon Valley, DisneyWorld, SeaWorld, Nashville).
- ✍✍ Even some states have strong enough identities to be brands. And Vermont is one of those states.

PROJECT OBJECTIVES

☞ Examine the Vermont brand from multiple perspectives:

Visitors

Residents

People who purchase Vermont products

Vermont business people

Out-of-state business people

☞ Determine the common brand associations held by all audiences.

☞ Align the identity strategies of Vermont agencies and departments under a single umbrella brand identity strategy that:

- Reflects the current brand image of Vermont in the minds of all constituents.
- Represents the entire State's interests.

☞ Adopt a common brand identifier (logo) for Vermont agencies and departments.

BRAND REVIEW PROCESS

~~✍~~ The O'Neal Strategy Group conducted personal interviews with 175 individuals.

- 92 Vermonters (residents and businesses)
- 83 out-of-state residents (tourists, businesses, purchasers of Vermont products)

~~✍~~ The interviews were conducted at the following locations:

Vermont Residents

- Blue Ben Diner
- COSTCO
- Church Street Market
- Marshfield Village Store
- Wayside Restaurant

Vermont Businesses

- Place of business

Visitors to Vermont

- Ben & Jerry's
- Bushnell Park, Hartford
- Astoria Station, Queens, NY

Purchasers of Vermont Products

- Lyman Market, Middlefield, CT
- Fair Haven Furniture, New Haven, CT

Out-of-State Businesses

- Place of business

BUSINESSES INTERVIEWED

OUT-OF-STATE

Achillon Pharmaceuticals
Caraba Power Engineers
Central Mass Machine
Delivery Technologies
Greenbatteries.com
Gunther International
I-TransCrypt
Marsh Management Services
Neurogen Corp
Price Waterhouse Coopers
Proton Energy Systems
Schanex Productions
Senior Research & Development
Sensor Switch
Sybase, Inc.

IN-STATE

Cabot Creamery
Carris Financial Group
Goodrich Fuel and Utility Systems
Green Mountain Coffee Roasters
IBM Microelectronics
Inn at Essex
Merchant's Bank
National Life Group
New England Culinary Institute
The Orvis Company
Rock of Ages Corp
Stowe Mountain Resort
Vertek Corp

METHODOLOGY

Based on previous Vermont brand studies, the O'Neal Strategy Group prepared a series of illustrated statements about Vermont, corresponding to brand associations identified in the previous studies.

Respondents were shown these illustrated statements and asked to:

- Pick the statements they personally associated with Vermont.
- Rank the selected statements in order of importance to them.
- In tabulating these rankings, a No. 1 ranking was given a score of 10, a No. 2 ranking a score of 9 and so on.

Respondents were then shown the “Moon & Mountain” logo (the logo with the most marketing impressions to date) along with examples of how various departments have incorporated it into their identity and asked the following questions:

- What do you think of this logo (Moon & Mountain)?
- What do you think about various state agencies and departments using one logo?

Respondents were then shown 17 other logos currently used by various agencies, departments and commissions and asked:

- Do you see another logo you like better (than Moon & Mountain) for the overall logo of Vermont?

Finally, respondents were shown examples that combined departmental logos with the Moon & Mountain logo and asked:

- What do you think of this approach? Is it a good idea, bad idea or does it matter? Why?

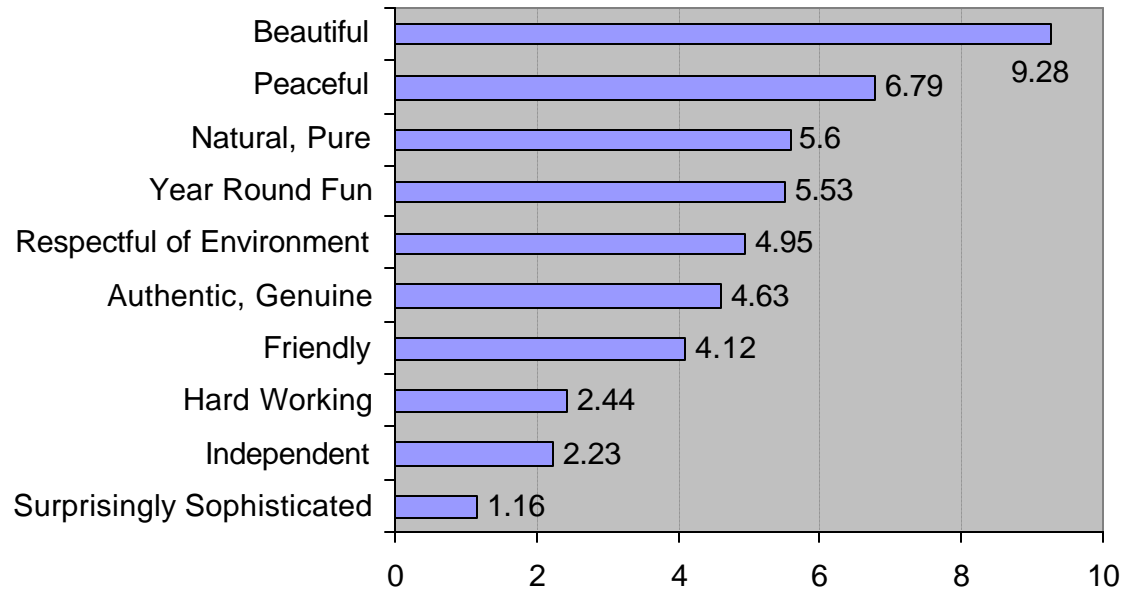
METHODOLOGY (cont.)

☞ Visitors and out-of-state purchasers of Vermont products were also shown eight different regional vacation guides and asked:

- How would you like Vermont presented to you...in a series of detailed regional vacation guides like these or in a single, if less comprehensive, guide that covers the entire state?

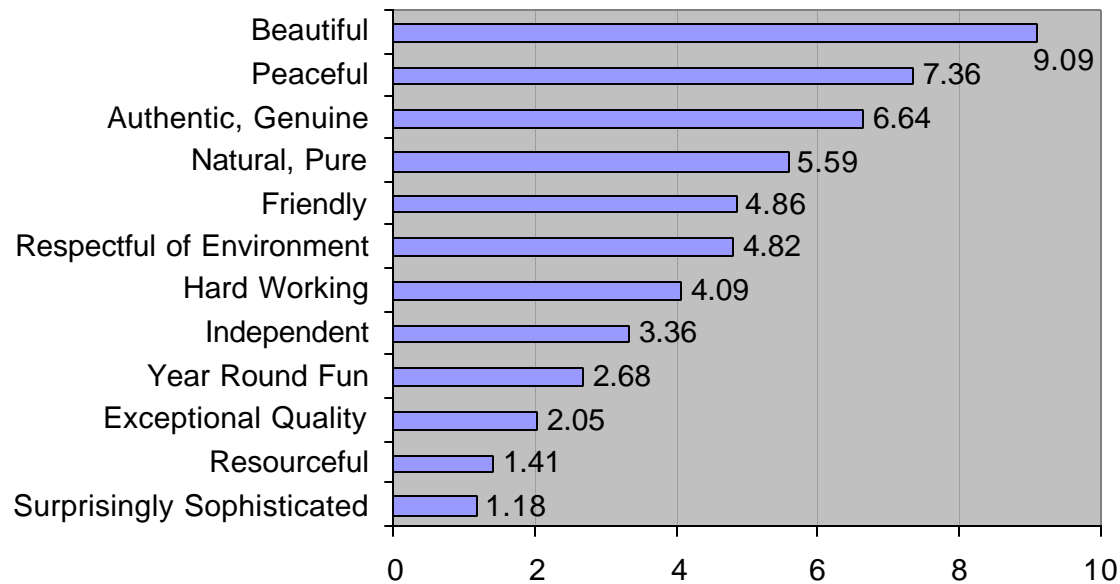
FINDINGS

VERMONT IMAGE FOR VISITORS



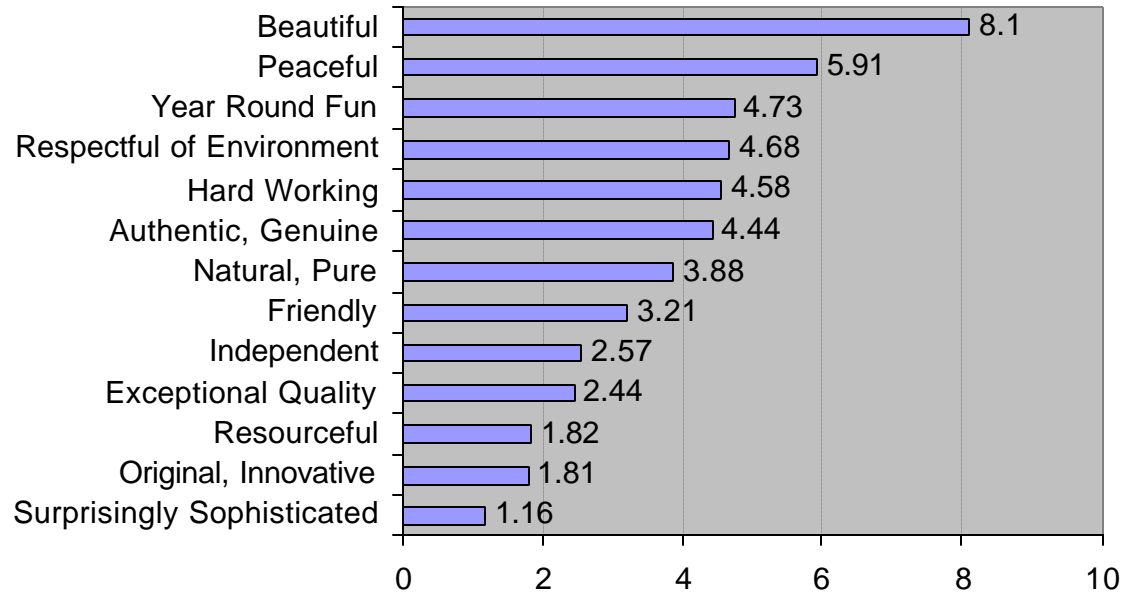
Vermont's image for visitors remains unchanged from the 1998 study. "Beautiful" and "peaceful" remain the dominant attributes, while "respectful of the environment," "authentic" and "friendly" are seen as the dominant personality traits. "Surprisingly sophisticated" is barely on visitors' radar screens, and "skilled professionals" and "high tech" are off the screen altogether.

VERMONT IMAGE FOR PURCHASERS OF VERMONT PRODUCTS



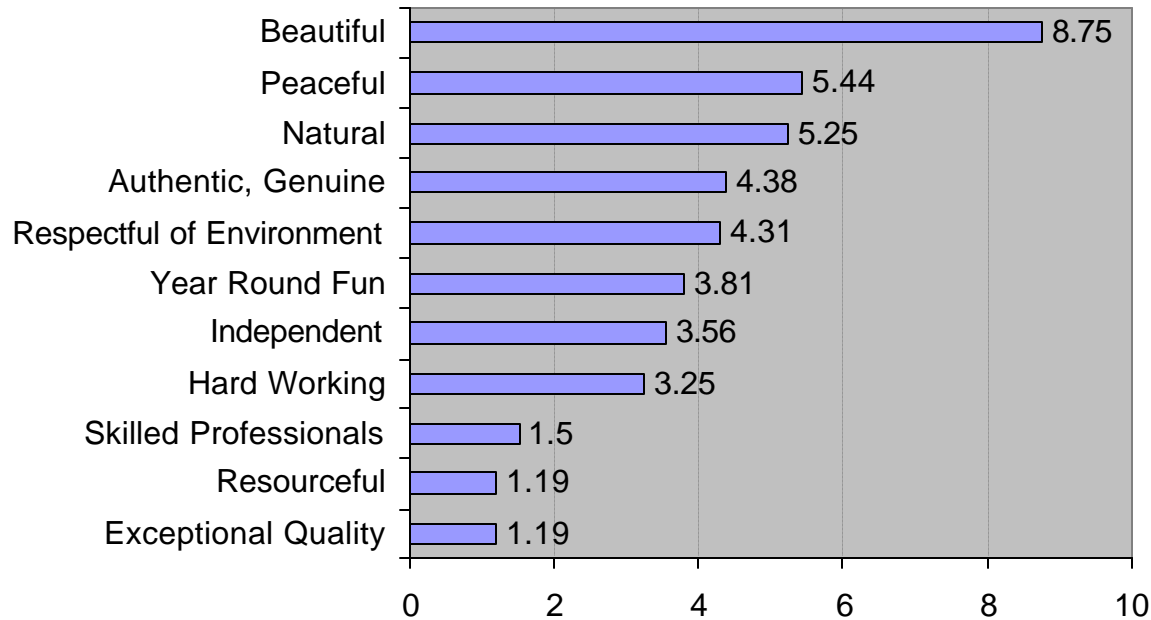
This brand image is similar to the one held by visitors. “Beautiful” and “peaceful” are the strongest attributes, but in this case, product-type associations such as “authentic/genuine” and “natural/pure” are a stronger part of the image (not surprising since these are people whose primary connection to Vermont is the purchase of products).

VERMONT IMAGE FOR RESIDENTS



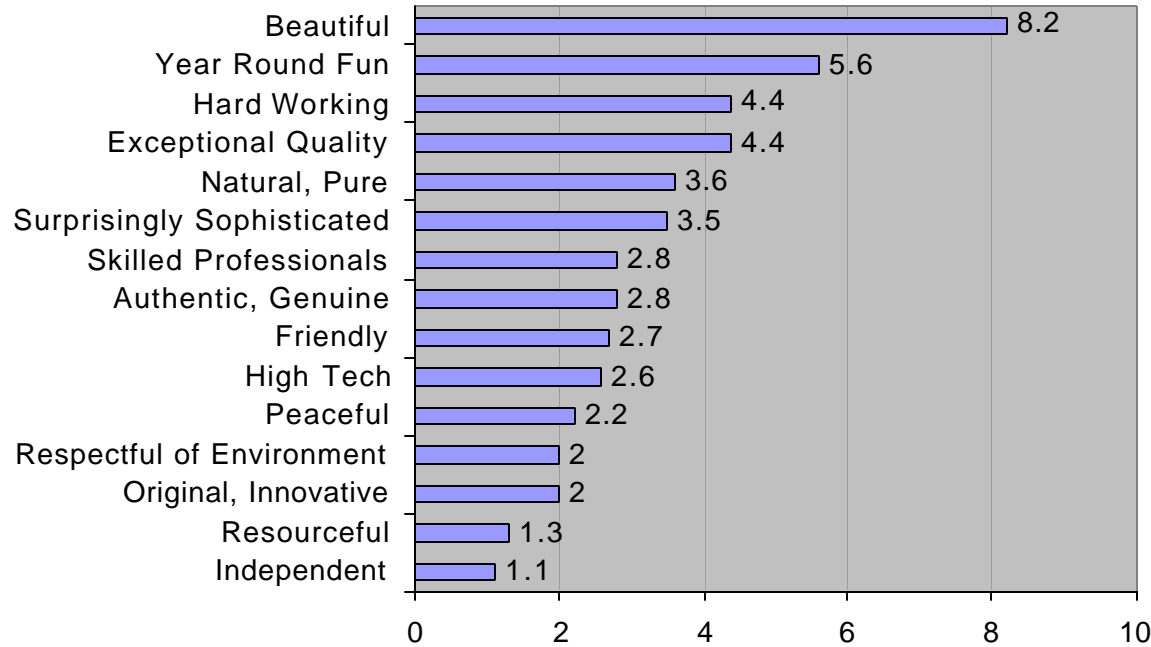
Again, this brand image is similar to the image held by visitors. Four of the top five associations are the same, led by “beautiful” and “peaceful.” As with visitors, “surprisingly sophisticated” is barely on Vermont residents’ radar screens, and “skilled professionals” and “high tech” are off the screen altogether.

VERMONT IMAGE FOR OUT-OF-STATE BUSINESSES



This is almost a mirror image of the brand image held by visitors to Vermont. One of the differences is that out-of-state business people are more likely to think of Vermonters as “hard working.” Also, they have some recognition that Vermont is home to “skilled professionals.” However, “surprisingly sophisticated” and “high tech” are off the scope. This could pose a problem if the state wants to retain and attract high tech and financial services firms.

VERMONT BRAND IMAGE FOR IN-STATE BUSINESSES

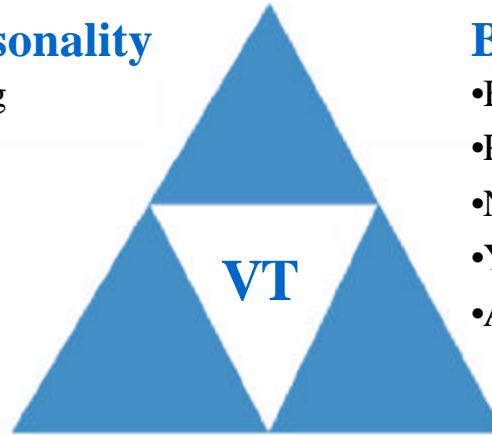


The brand image held by Vermont business people is the only image that differs substantially from the brand images of other audiences. “Beautiful” is still the No. 1 attribute, but “peaceful” is way down the list. In its place are brand attributes and personality traits such as “hard working,” “quality,” “surprisingly sophisticated,” and “skilled professionals.” Even “high tech” registers as part of the imagery. The important thing is that this is the brand image many Vermont businesses want the state to project (as opposed to the more tranquil, bucolic “tourism” image). This is the brand image they feel they need to recruit skilled professionals, particularly in high tech industries.

SHARED BRAND IMAGE OF VERMONT

Brand Personality

- Hard Working
- Friendly
- Respectful of Environment



Brand Attributes

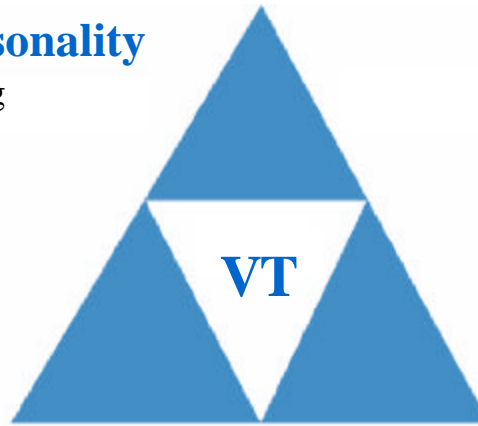
- Beautiful
- Peaceful
- Natural, Pure
- Year Round Outdoor Fun
- Authentic, Genuine

There is a common brand image that lives in the minds of all five audiences...and it is expressed in the Brand Triangle above. Everyone sees Vermont this way. The question is: does this represent the only way Vermont agencies and Vermont businesses want to be seen?

DESIRED BRAND IDENTITY FOR VERMONT

Brand Personality

- Hard Working
- Friendly
- Respectful of Environment
- Creative
- Skilled Professionals



Brand Attributes

- Beautiful
- Peaceful
- Natural, Pure
- Year Round Outdoor Fun
- Authentic, Genuine
- Great Place to Raise a Family

Brand Promise Feel More Alive

A brand image is how a product or place is seen now. A brand identity is how that product or place wants to be seen in the future. Based on the information gathered in the course of this project, here is the way government agencies and businesses want Vermont to be seen in the future.

RATIONALE FOR BRAND IDENTITY STRATEGY

Addition of “Creative”

Arguably, people already see Vermonters as “creative.” When presented with statements about Vermonters being “resourceful” or “original,” respondents frequently translated those attributes into “creative.” In fact, if “Vermonters are creative” had been one of the statements tested, we feel it would have ranked much higher than either “resourceful” or “original.” “Creative” also relates to the arts and entertainment part of “surprisingly sophisticated.”

Addition of “Skilled Professionals & “Great Place to Raise Family”

These two attributes are not part of the current shared image of Vermont, so it will take a conscious effort to plant these associations in people’s minds.

However, the effort should be worth it. These two associations in no way undermine the current collective Vermont brand image. They take nothing away. In fact, they simply “add back” two aspects of the Vermont reality—aspects that are important to retaining and attracting jobs for the people of Vermont.

RATIONALE FOR BRAND IDENTITY STRATEGY (cont.)

Absence of “Surprisingly Sophisticated”

Sophisticated is not a good word to describe Vermont. While many Vermonters enjoy sophisticated pursuits, they do not use that word to characterize themselves. Sophisticated conjures up the image of trendy New Yorkers, not authentic, genuine Vermonters. Just as important, visitors do not think of Vermont in those terms either.

Respondents were asked if the statement “Vermont is full of arts and entertainment” was a better description of Vermont than “surprisingly sophisticated.” Most respondents felt it was, but they still did not regard it as a major attribute of Vermont. In fact, many Vermonters dismissed the statement as being limited to Burlington.

Using the word “sophisticated” is a mistake; but the state must still stand for more than maple sugar, mountains and cows. Vermont marketers need to take the concept of “creative” and give it a full, robust meaning that incorporates both the intellectual and artistic richness of Vermont.

REACTION TO “MOON & MOUNTAIN” LOGO



Reaction to the “Moon & Mountain” logo was favorable for both non-Vermonters and Vermonters

	<u>Non-Residents</u>	<u>Vermonters</u>
Like it	41%	40%
It’s fine, OK	29%	26%
Don’t like it	22%	20%
No answer	8%	13%

Majority of people favored the “Moon & Mountain” over the word “Vermont.”








70% of Vermont residents favor the idea of Vermont agencies “getting together” under one logo.

- They feel it might lead to inter-agency cooperation—something they want but do not see now.

REACTION TO OTHER LOGOS

Preference for the “Moon & Mountain” logo is stronger among non-residents than it is among Vermonters.

But over 50% of Vermonters still prefer “Moon & Mountain” over other existing logos.

Preferred Logo	Non-Residents	Vermonters
 VERMONT	70%	51%
	14%	15%
	--	10%
	3%	9%
	5%	8%
	8%	5%
	--	2%

REACTION TO COMBINING LOGOS



✍️ Reaction to combining logos differs dramatically between non-residents and residents.

- Non-residents don't like the idea. They think it is cluttered and unnecessary.
- Residents are far more tolerant of this idea (these icons mean more to Vermonters than to non-residents). However, almost one in four still think it is a bad idea.
- Vermont business people don't like the idea. They feel it projects a confused and old-fashioned image.

	<u>Non-Residents</u>	<u>Vermont Residents</u>	<u>Vermont Businesses</u>
Good idea	18%	53%	--
Bad idea	71%	38%	100%
Doesn't matter	11%	9%	--

MOST RECOGNIZED DEPARTMENTAL LOGOS

☞ Only a handful of departmental logos have any “equity” with the public.



☞ Rest of departmental and agency logos could probably be dropped without anybody outside those departments noticing.

REACTION TO REGIONAL VACATION GUIDES

☞ Consumers overwhelmingly prefer one statewide vacation guide to multiple regional guides.

Preference for Vacation Guides

Regional Guides	2%
Single Statewide Guide	98%

☞ If today's consumers want more detailed information about a region, they go to the Internet.

RECOMMENDATIONS

CONSULTANT'S RECOMMENDATIONS

☞ All Vermont agencies and departments should pursue a common core brand identity strategy as represented on page 18 of this report.

- They should embrace and reflect the same core brand attributes
- They should embrace and reflect the same core brand personality
- Individual department attributes and messages should be integrated into this common brand architecture.

☞ Vermont agencies, like Vermont businesses, should leverage the imagery that is already in peoples' minds in communicating with the public. Two examples are:

- Department of Economic Development's use of scenic beauty shots in marketing Vermont's captive insurance industry.
- Green Mountain Coffee Roasters use of beautiful, peaceful scenes in its marketing materials.
- However, beautiful, peaceful and natural are not synonymous with rural and backward. Be careful of overusing bucolic images. Vermont should be seen as a great place to visit, live and have a business—not as a backwater place lacking in economic opportunity.

☞ Images of scenic beauty are not the only imagery that should be evoked.

- It is people who give Vermont its brand personality and character.
- Images of the landscape need to be peopled with Vermonters—hard at work, having fun, enjoying their families, etc.
- Everybody shouldn't look like Fred Tuttle. Show more of the diversity that is part of today's Vermont.

CONSULTANT'S RECOMMENDATIONS (cont.)

~~☞~~ All Vermont agencies and departments should “unite” under a single logo (“Moon & Mountain”).

- This logo should be the sole logo for all agencies other than Fish & Wildlife, Forest, Parks & Recreation and Agriculture Food & Markets (the departments with the most recognizable icons).
- Fish & Wildlife, Forest, Parks & Recreation and Agriculture Food & Markets should be able to retain their individual (and well recognized) logos for in-state use only, but even then, these logos should not be butted up against the Vermont logo (Moon & Mountain).

~~☞~~ Vermont should cease publishing full-blown regional vacation guides in favor of a single statewide guide.

- Could be one publication for spring/summer and one for fall/winter.
- Money saved should be used for bolstering online and offline marketing for entire state.

~~☞~~ Above all else, Vermont agencies and departments should “live” the brand.

- In their relationship with other departments and the public, they should be seen as hard working and friendly (as opposed to the classic bureaucratic image of indifferent, territorial and slow to act).
- Being custodians of the brand is more than keeping the state pristine. It means living up to the public’s human expectations as well.
- Vermont is small enough in terms of population to pull this off.
- If government can continually reflect and reinforce the Vermont brand, the state will have gone a long way in differentiating itself from any other state in the nation.