

# **Branding Study For the Northeast Kingdom Final Report**

Submitted to Al Duey  
Northeast Kingdom Travel and Tourism Association

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## **Introduction**

This document is a report on the results of a market research branding study undertaken during the summer and fall of 2003 in the Northeast Kingdom (NEK) of Vermont. The purpose of the study was to identify consumer perceptions of the brand identity of the NEK and to describe the profile of frequent visitors to the NEK. A survey instrument was designed and administered to collect information from visitors the NEK. A vast majority of the surveys were completed by visitors in the part of the NEK that includes Newport and Derby Line, east to Island Pond, south to Lake Willoughby, Barton, Burke, St. Johnsbury, and Danville. Jay Peak and Montgomery didn't provide any survey results while a campground in Westfield collected a small number of surveys and Cabot near Central Vermont was a site where surveys and interviews were completed. Summer visitation seems greatest in the areas where surveys were collected and therefore the results consist of a qualified sample area. This report provides details of the results of the visitor surveys and employs the visitor feedback in developing recommendations for a tourism development strategy in the NEK.

Recommendations for product enhancement, marketing, and service delivery in this document are informed from interpretation of the survey results and by trends in the tourism industry. Mini-case studies are presented throughout the narrative that illustrate key points. The tourism model employed in the product development suggestions is a nature-based tourism development strategy that uses natural attractions as the primary factor pulling visitors to a destination.

The tourism industry is very complex. In order to succeed in the very competitive tourism market, tourism providers in the NEK will need to develop a recognizable brand built around a consistent message. The main strategy for developing a recognizable brand for the NEK suggested in this report requires building relationships with consumers through all stages of the visitor cycle; from discovery and pre-arrival, through occupancy, departure, and post visit follow-up. This approach to tourism development is a niche marketing strategy based on customization of the tourism experience and attention to quality in all aspects of the tourism delivery process.

This report begins with an analysis of the survey results. A visitor profile is then developed and linked with consumer trends in the tourism sector. Recommendations for refining the brand of the NEK, product enhancement suggestions, and a marketing strategy based on input from the survey results and an analysis of the primary attractions and activities identified as important by visitors who responded to the survey, are then discussed. Finally, roles for both individual enterprise owners and representatives of the Northeast Kingdom Travel and Tourism Association are identified that lay out steps required to continue to grow tourism in the Northeast Kingdom.

In an effort to determine why travelers do not visit the NEK, a survey instrument was administered outside of the NEK to tourists at the Ben and Jerry's attraction and at the Montpelier Information Center. The results were revealing as shown below.

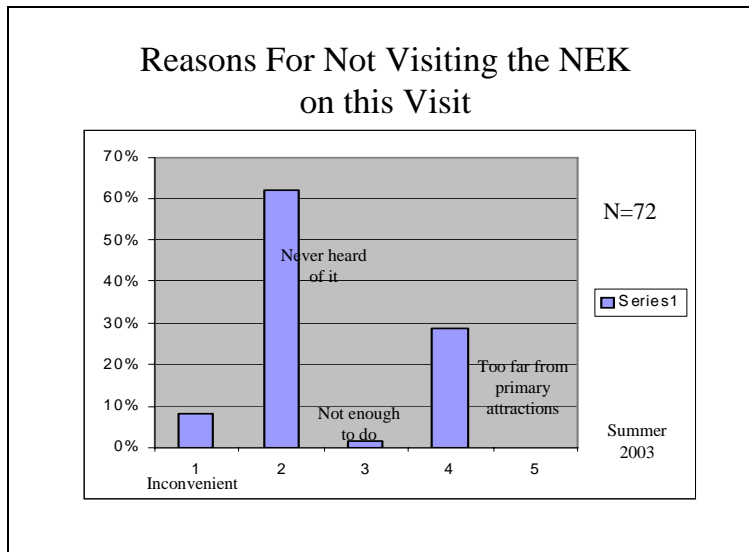
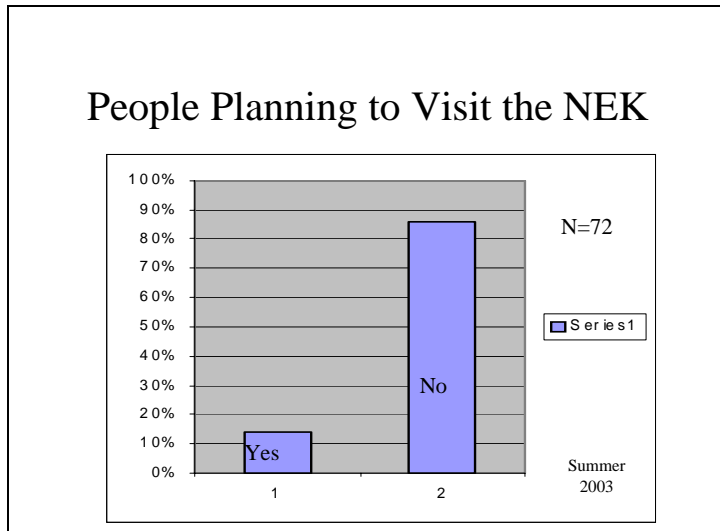
### Survey of Visitors Outside the NEK

A survey of 72 travelers visiting Vermont destinations outside of the NEK was quite revealing. Nearly 90% of those surveyed said that they were not planning to visit the NEK during their visit to Vermont. 63% of those surveyed had never heard of the NEK and nearly 30% stated that it was too far from their primary destination. A similar message was heard while interviewing

and surveying visitors at the Cabot Creamery in Cabot. Although these visitors were essentially in the Northeast Kingdom region of Vermont, they had not heard of it and were not planning on venturing further into the NEK. Rather, most visitors to Cabot entering from the West, turn right around and heads back to Burlington, Stowe, or other regions of Vermont outside of the NEK. Some respondents to the surveys outside of the NEK even stated that they had not heard of the NEK while they had in fact spent a night or two within the NEK in places such as St. Johnsbury. These results indicate that visitors to the state have either not been introduced to the region of the NEK or they have not been motivated to research the NEK region as a potential destination while visiting Vermont. The fact that 63% had not heard of the region implies that the marketing materials being delivered to the consumer planning a vacation to Vermont either do not include NEK promotional pieces or the consumer is not remembering what they have read.

The results of this brief aspect of the branding study clearly suggest that the NEK is not standing out in the traveler's mind as a destination in Vermont. The remainder of this study was designed to determine the profile of people who do visit

the NEK for a vacation, to identify why people choose the NEK as their destination, and to understand how visitors are really spending their time while vacationing in the NEK.



## Visitor Survey Results

A total of 552 surveys were collected during the summer and fall of 2003. (copy of survey is attached in appendix A) 327 summer visitors to the NEK living outside of Vermont but within the U.S. completed the survey. Canadian travelers completed 50 surveys and 55 residents of Vermont completed the survey. In the fall, 48 visitors who reside outside of Vermont completed the survey. The results from the three groups of visitors to the NEK turned out to be quite consistent, with some minor variations as will be described. Therefore, survey analysis is aggregated for the most part, and where applicable, is analyzed independently. Visitor surveys were collected from a variety of sources, including information centers along the interstates, the information center in downtown Newport, inns and bed and breakfasts, campgrounds, and attractions such as The Old Stone House Museum and Cabot Creamery. (See appendix B for a complete list). Some visitor types did not choose to complete the survey or were not visiting the NEK in large numbers. As is indicated by the survey results, some age groups had a very low representation in the survey responses.

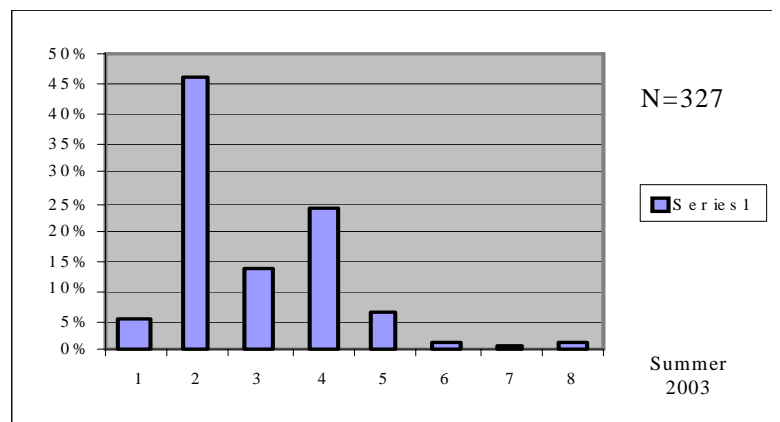
### Number in Party

Visitor survey respondents included couples, families with one or more children, single travelers, and groups of unrelated people.

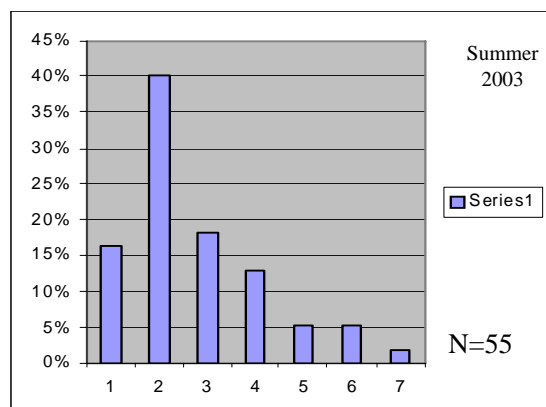
Couples and families each comprised approximately 45% of those answering the survey, while 10% were completed by the single or unrelated parties.

Observing that a similarly large number of couples and families both visited the NEK, one might wonder why two seemingly diverse groups would be compelled to frequent the same area. Understanding this phenomena can be gained when the profile of these visitor groups is

### U.S. Visitors to the NEK Number in Party

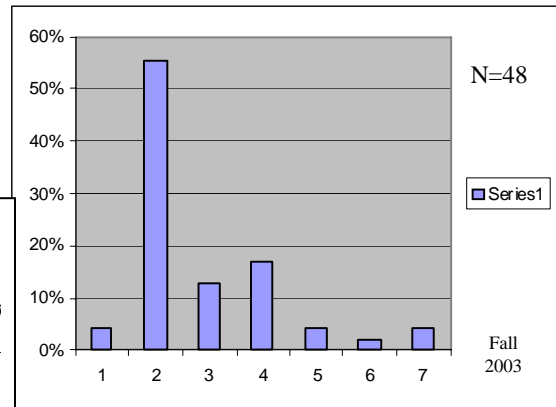


### Vermonters: Number in Party

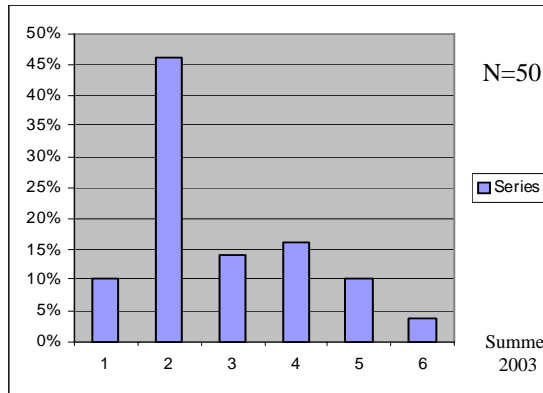


evaluated and the activities each market segment participated in are evaluated. As is revealed in the visitor profile section, these two market segments have a lot in common when it comes to factors pulling them to the NEK for a vacation.

Fall Number in Party



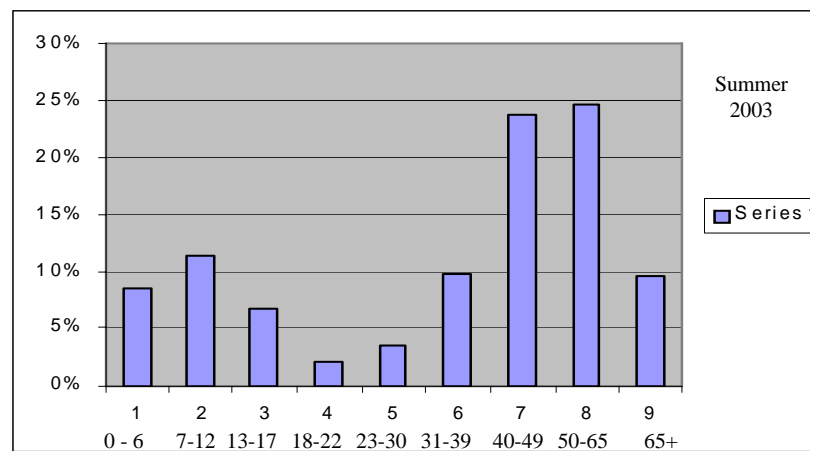
Canadian: Number in Party



**Age of Visitors**

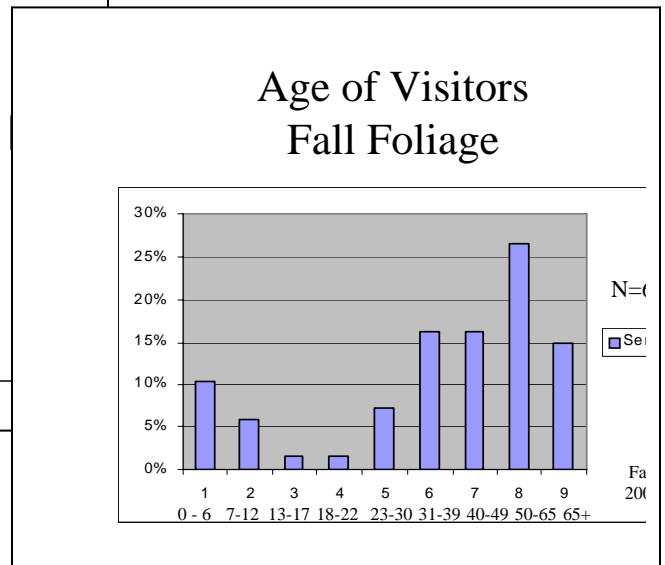
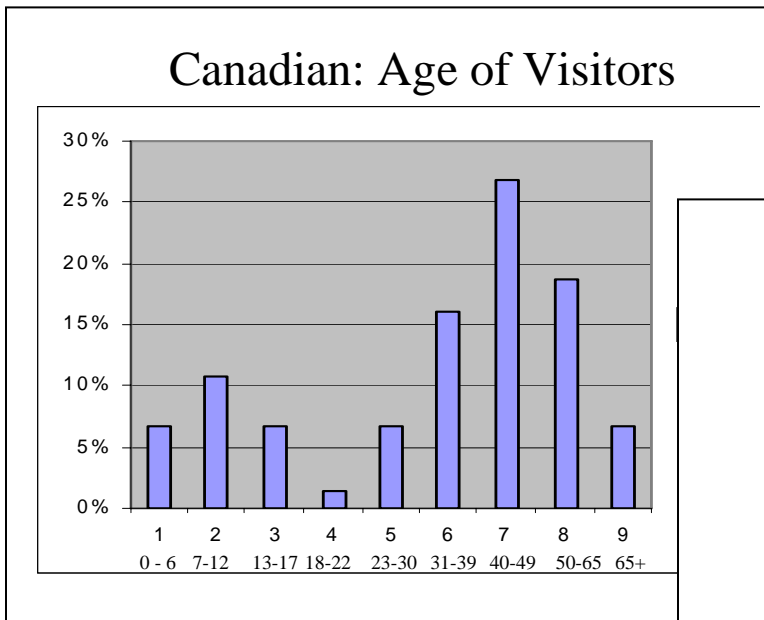
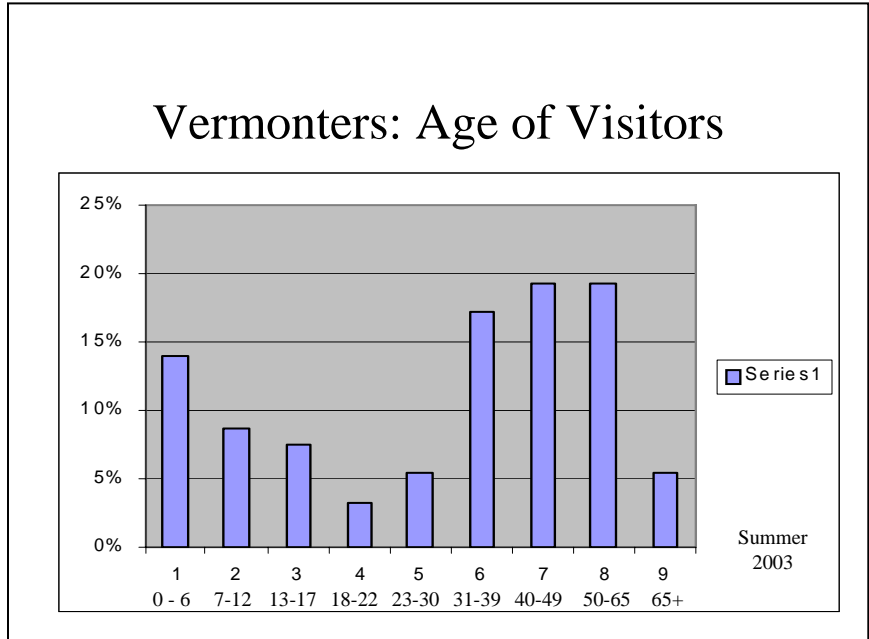
The profile of visitors to the NEK responding to the survey consisted of two distinct groups; couples traveling alone, the majority of whom were between the ages of 40 and 65, and families with one or two children with the age range of the parents between 31 and 49 and the age range of the children between new born and 12 years old. A small number of travelers were between the ages of 18 and 30 and less than 10% of the families responding to the survey had children in the teen years.

U.S. Visitors to the NEK: Age of Visitors



The small number of young adults represented in the survey suggests that either this age segment is visiting the NEK but not interested in completing surveys, visited destinations where the surveys were not administered, or were not visiting the NEK in large numbers.

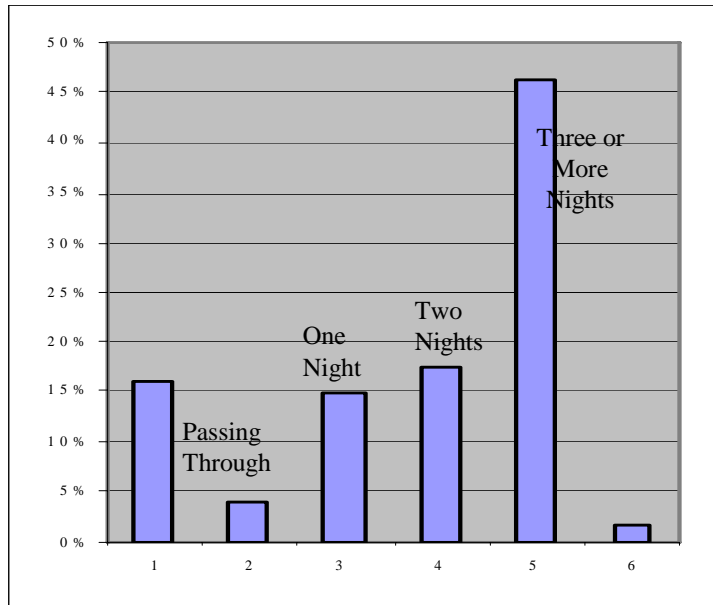
Observations from the raw data suggest that it is not uncommon for one or both parents with children to be in their fifties, much the same age as the baby boomers traveling without children.



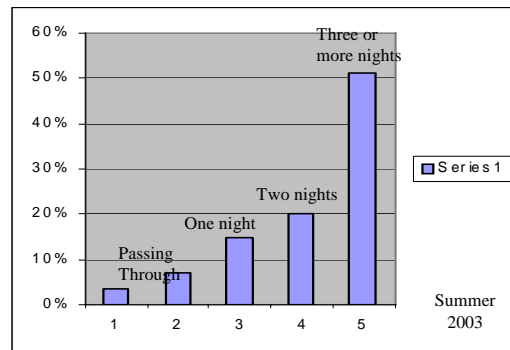
## Length Of Stay

Over 60% of Vermonters and U.S. visitors responding to the survey stayed two or more nights suggesting that the travel patterns of the survey respondents are consistent with the norm for travelers across the U.S. during the summer months. During this time period, travelers will include at least part of a work week in their travel plans that typically span a weekend. The first two columns depicted in the charts on this page show that travelers were either passing directly through the NEK to other destinations or that visitors spent time in the NEK, but did not stay over night. Vermonters were unlikely to be “passing through” the NEK while just over 35% of the Canadians who completed the survey passed directly through the NEK on to other destinations. The 15% of U.S. visitors and nearly 20% of Canadian visitors responding to the survey staying one night in the NEK represent a market that may be motivated to return. Introducing the core assets and main attractions of the NEK

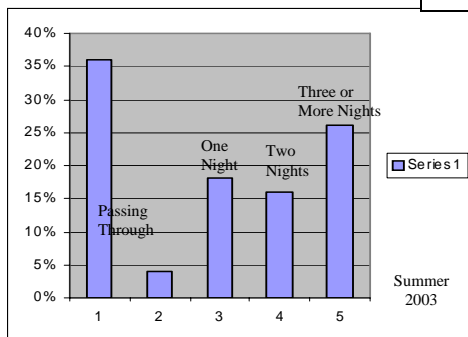
### U.S. Visitors to the NEK: Length of Stay



### Vermonters: Length of Stay



### Canadian: Length of Stay



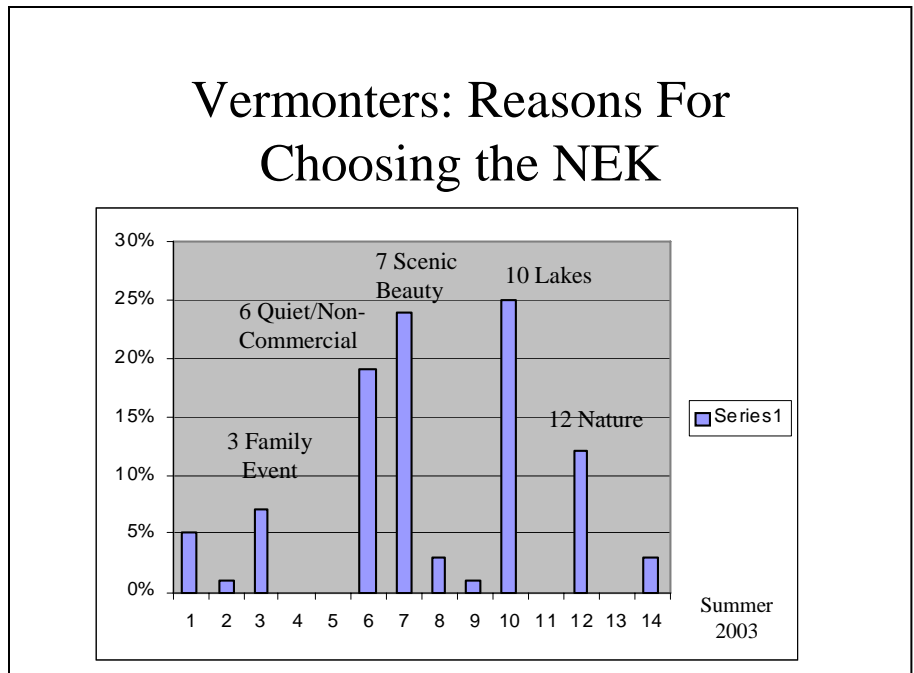
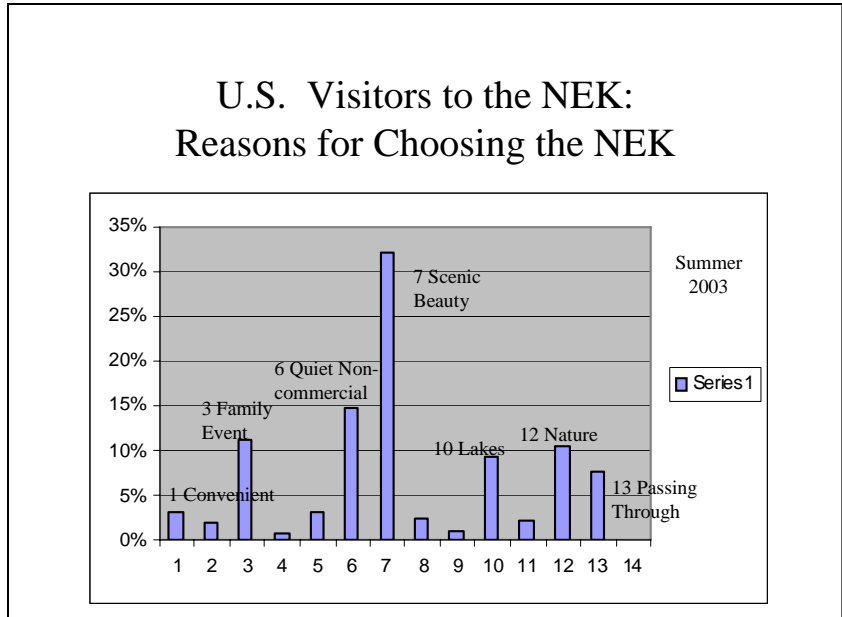
through in-room literature, video or direct interaction with staff has the potential to motivate travelers to stay longer the next time they are traveling through the NEK.

## Reason For Choosing The Northeast Kingdom as a Vacation Destination

The next two sets of data gathered from the survey provide indicators of why people chose to visit the NEK and how they preferred to spend their time while in the NEK. From open-ended questions, responses clearly indicate that visitors choosing the NEK as a destination for their vacation have a love of nature and want to be actively engaged in experiencing nature first hand. One of the striking

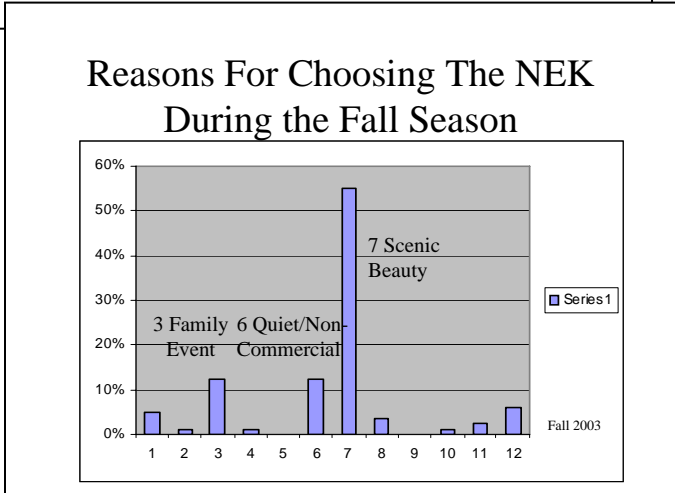
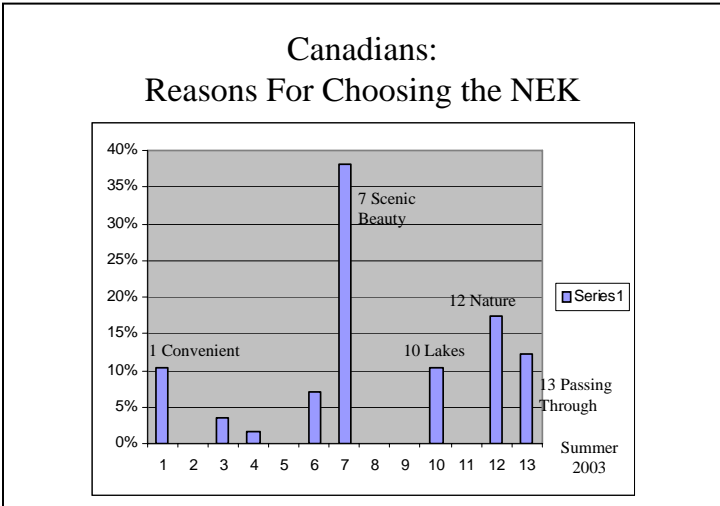
differences between the three sub-groups is that 25% of the responses by Vermonters identified the lakes as a primary reason for choosing the NEK as a vacation destination while visitors from

Canada and the U.S. selected lakes as a primary reason for selecting the NEK as a vacation destination just over 10% of the time. This difference may explain why Vermonters tend to include fishing, motor boating, and canoeing more frequently in their activities than the other respondents. Vermonters clearly indicated that lakes in the NEK are a significant aspect of the lure and brand of the NEK.



Family events also stand out as a reason visitors choose the NEK. 10% of the U.S. visitors and fall foliage visitors indicated that a family event was a primary reason for choosing the NEK as a vacation destination while just over 5% of the respondents from Vermont visiting the NEK made similar statements.

Fall foliage visitors and Canadian visitors identify the scenic beauty more frequently than the other survey respondents as the main reason for selecting the NEK as a vacation destination. It is obvious that fall visitors would not select lakes as a primary reason for choosing the NEK since fall is not the time of year to be enjoying water related activities. And the Canadians, like the U.S. visitors to the NEK, may not know that lakes are prevalent in the region.



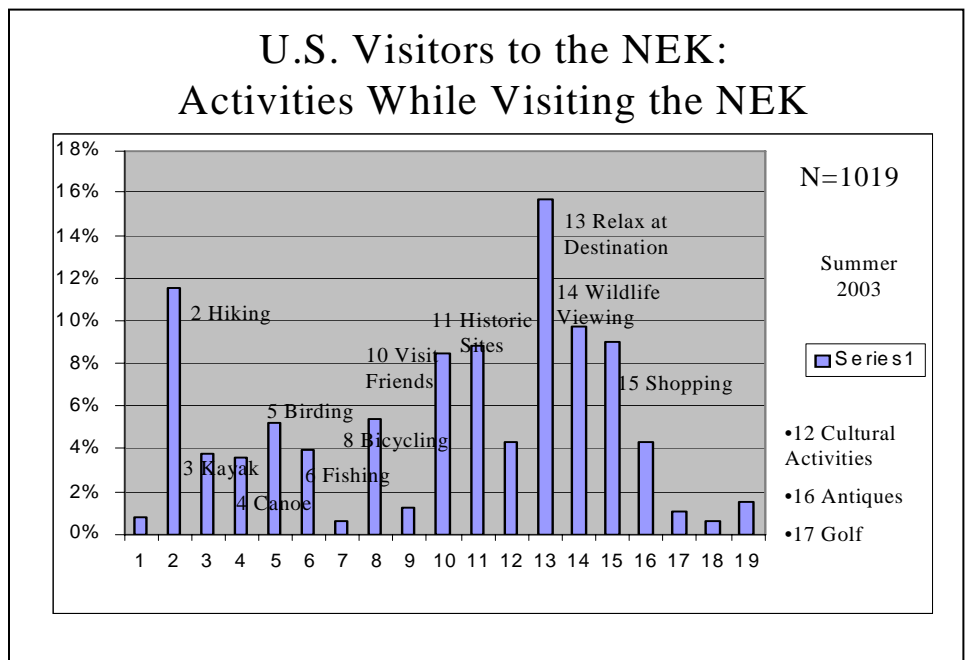
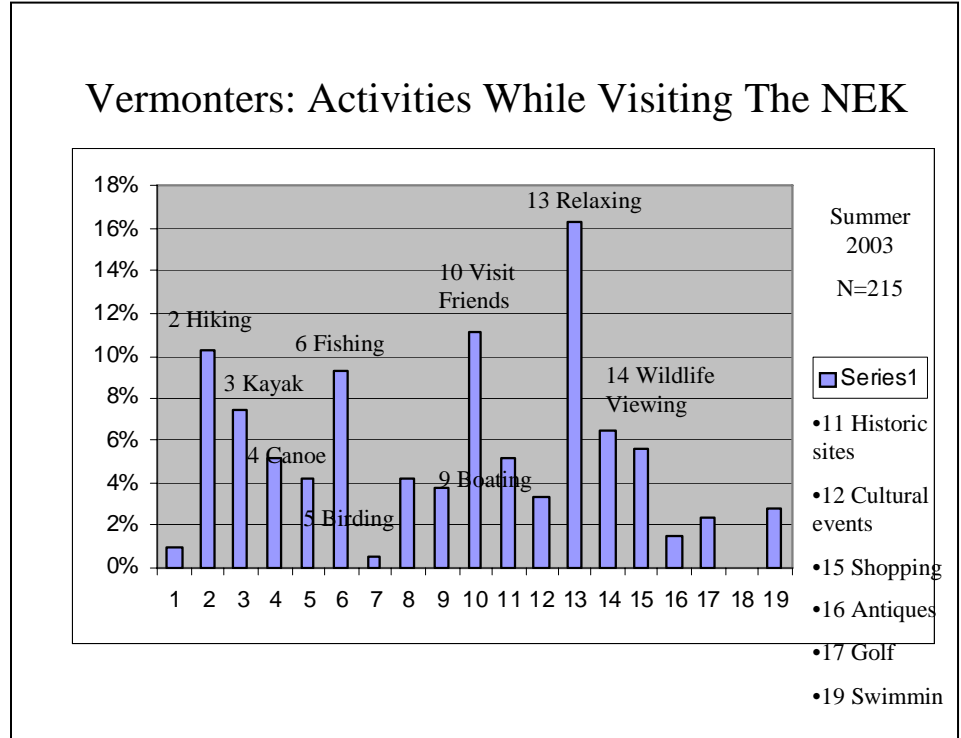
## Activities While Visiting the NEK

Visitors to the NEK participated in a wide variety of activities that put them in touch with nature while simultaneously provided them with opportunities to enrich the relationships between themselves and other group members. Responses across three of the four sets of data are consistent although a few of the activities are worth noting. Small differences appear between Vermonters

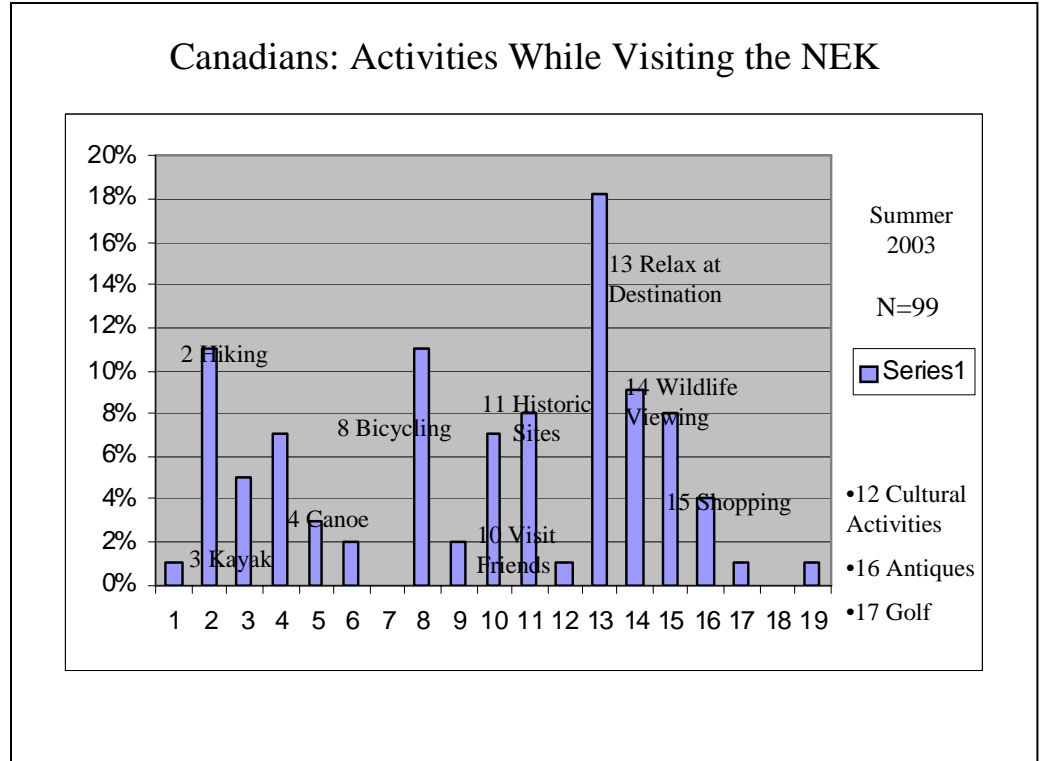
visiting the NEK and visitors from outside Vermont, especially around water based activities. Vermonters indicated that they were participating more extensively in motor boating, canoeing, and fishing while visitors from around the U.S. were shopping, kayaking, antiquing, visiting historic sites and participating in cultural activities more often than the Vermont residents.

Bicycling among Canadian visitors was higher than in the other two groups. This may be an indication of the number of responses from Canadians visiting the area to mountain bike on the Kingdom Trails.

Relaxing at a destination is a response that was indicated most frequently by survey respondents, amounting



to 18% of the responses from the Canadian visitors and 16% of the responses for both the Vermont visitor to the NEK and the U.S. visitor. Relaxing at a destination may have a variety of meanings for people. The travelers in this survey clearly indicate that they were not only engaged in an active vacation but that they were also clearly in need of time to relax.



Responses to the survey question regarding activities while visiting the NEK indicate that the visitors were pursuing activities in nature far more than they were pursuing manmade activities or sightseeing activities. Activities focused on man-made attractions such as cultural activities, historic sites, shopping, and the like were an important aspect of the visitor experience, but overall, were secondary to activities taking place in nature based attractions.

## Visitor Profile

A variety of customer types visit the NEK during the summer months. The customers who completed surveys exhibited a certain profile that cannot be construed as the only visitor type to the NEK. However, those visitors who did complete surveys may represent a consumer profile that is most likely to visit the NEK and who may represent the type of visitor likely to spend the most money in the NEK while on vacation.

Visitors to the NEK who declined to complete surveys may have demographic and lifestyle characteristics that are not consistent with those visitor types described in this report. Surveys were available but none completed at a number of properties in the NEK. These properties included the Lynburke Motel, Jay Peak Resort Hotel, Lakefront Inn and Motel, and The Colonial Inn. Customers staying at the Sugar Ridge Campground and Prouty Beach Campground were also not inclined to complete surveys although surveys were offered as part of their registration packet.

The customers who did complete surveys represent visitors to a variety of sites including highway information centers, attractions, upscale lodges, roadside motels, a farm bed and breakfast and an outfitter. The description of the visitor to the NEK outlined below provides general characteristics that are helpful in identifying target audiences for tourism development in the NEK.

## Places of Origin

The most common places of origin for summer visitors to the NEK responding to the survey included the Boston Metropolitan Area, communities to the north of New York City, areas surrounding large population areas of Connecticut, and Southern New Hampshire. Unlike the results from the Vermont Department of Tourism and Marketing which suggest that the highest percentage of visitors to Vermont originate from the state of New York, these survey results clearly indicate that the greatest number of visitors to the NEK live in Massachusetts, as shown in the table below.

% Summer Visitors	% Fall Visitors	% Visitors to Vermont but outside NEK
MA = 26%	MA = 25%	MA = 19%
NY = 16%	CT = 16%	NY = 11%
CT = 11%	NY = 12%	CT = 7%
NH = 7%		NJ = 7%
		NH = 5%
4 states = 60%	3 states = 53%	5 states = 49%

As the zip code analysis illustrates in these examples, the majority of the visitors to the NEK responding to this survey live in the suburbs and well-established neighborhoods outside the cities of Boston, Hartford and New York.

01752	Marlborough,MA	56,000
01754	Maynard,MA	60,000
01760	Natick,MA	69,000
01810	Andover,MA	87,000
01810	Andover,MA	87,000
01820		
01826	Dracut,MA	57,000
01827	Dunstable,MA	86,000
01876	Tewksbury,MA	68,000
01876	Tewksbury,MA	68,000

10572	Pleasantville, NY	105,000
10996	Westpoint, NY	56,000
11218	Brooklyn, NY	36,000
11580	Valley Stream, NY	72,000
11724	Cold Spring Harbor, NY	112,000
11762	Massapequa Park, NY	86,117

03034	Candia,NH	67,000
03034	Candia,NH	67,000
03064	Nashua,NH	61,000
03104	Manchester,NH	50,000
03110	Bedford,NH	91,000
03221	Bradford,NH	57,000
03221	Bradford,NH	57,000
289	Winnisquam,NH	
301	Concord,NH	52,000
301	Concord,NH	52,000

06082	Enfield,CT	60,000
06084	Tolland,CT	82,000
06107	W.Hartford,CT	77,000
06357	Niantic,CT	65,000
06365	Preston,CT	62,000
06375	Quaker Hill,CT	
06405	Branford,CT	69,000
06415	Colchester,CT	72,000
06420	Salem,CT	75,000
06423	E. Haddam,CT	70,000

The median household income shown on the far right of the tables on this page, revealed in the zip code analysis that many of the visitors choosing the NEK as a vacation destination are from the middle and upper middle classes.

These visitors are typically white-collar professionals with at least a bachelor’s degree and have often earned a graduate degree in a variety of disciplines. The neighborhoods are predominantly Caucasian but with an increasing population of ethnically diverse residents. Individual home ownership is the norm, with many homes valued well above \$500,000. The net worth of the travelers originating from these zip code areas is high, although debt may be quite high as well.

**Lifestyle Characteristics and Interests While On Vacation**

The profile of the couples traveling to the NEK reveals an active, engaged couple interested in exercise walking, bicycling, hiking, and viewing nature. They enjoy relaxing at their destination, eating local cuisine and learning about the place they are visiting. As it turns out, the families traveling to the NEK have a similar profile. The older parents are interested in quiet, non-commercial destinations where they can spend quality time with their younger children but also enjoy the landscape, wildlife, and opportunity to relax while on vacation. These parents work long hours at high paying jobs where they have a lot of responsibility. During the week they rarely spend time with

their children, often employing nannies and other care-givers to raise their children. When on vacation, however, these moms and dads go out of their way to spend time playing and learning with their children. One comment from a survey read, “Very pleasant environment for relaxing with my family.” And another person remarked, “Loved running with our kids in fields, soaking up views and sunsets.”

Study results indicate that visitors to the NEK are “soft adventure” types who seek independent outdoor recreational activities in safe, natural settings. Camping is popular among visitors to the NEK during the summer months. The somewhat older crowd that responded to this survey enjoyed nature by hiking, biking and canoeing. They also enjoyed relaxing at their destination and shopping as a part of their vacation itineraries. These characteristics are consistent with the Centric-Venturer or Near-Venturer labels described by Stanley Plog in his analysis of the tourism market.<sup>1</sup> This market segment has a propensity towards soft adventure, light or moderate physical activity and willingness to take moderate risks while on vacation. Plog suggests that these psychographic types “are intellectually curious and enjoy exploring the world around them,” spend discretionary income more readily than less venturesome types, are more likely to be travel pioneers, are active and relatively aggressive in their daily lives, “prefer a day filled with varying activities and challenges,” and “often prefer to be alone and somewhat meditative.” Plog describes the slightly venturesome aging baby boomer market segment that travels without children in terms of travel related behavior stating that venturers:

- “Travel more frequently because travel is an important part of exploring the world around them,
- Take longer trips,
- Spend more per capita on a daily basis,
- Strongly prefer unique, underdeveloped destinations that have retained their native charm. More importantly, they try to avoid crowded, touristy places.
- Prefer to participate in local customs and habits and tend to avoid those activities that seem too common or familiar, or specially staged for tourists,
- Are very active when traveling, spending most of their waking hours exploring and learning about the places they visit, rather than soaking up the sun,
- Purchase mostly authentic local arts and crafts, instead of souvenirs. They avoid traditional tourist traps that sell replicas of local culture.”

This market segment continues to grow as the 40 something market segment begins to mature and the baby boomer generation remains active and youthful.

### **“The New Tourist” A Growing Travel Market Segment**

An emerging travel market segment labeled “the new tourist” is a market segment that is consistent with the types of travelers selecting the NEK as a vacation destination. The new tourist, according to Pam Wight, an ecotourism marketing expert from Canada,

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<sup>1</sup> Leisure Travel: A Marketing Handbook by Stanley C. Plog, Pearson Prentice Hall Publishing. 2004

exhibits many of the demographic and lifestyle characteristics that are consistent with the profile of visitors to the NEK.

Descriptors for this market segment include the following identifiers that match well with the profile of summer visitors to the NEK and are consistent with Plogs description of the Centric-Venturer and Near-Venturer traveler consumer:

<ul style="list-style-type: none"> <li>• Loves the out-of-doors</li> <li>• Enjoys nature</li> <li>• Takes vacations to natural destinations</li> <li>• Takes moderate risks</li> <li>• Reads outdoor magazines</li> <li>• Exercises daily</li> <li>• Is quality conscious</li> <li>• Is environmentally aware</li> <li>• Is mentally active</li> <li>• Seeks handmade products as souvenirs</li> <li>• Wants to be different</li> </ul>	<ul style="list-style-type: none"> <li>• Makes healthy choices</li> <li>• Is experienced as a traveler</li> <li>• Enjoys either individual or small group trips</li> <li>• Seeks variety while on vacation as well as unique vacation experiences</li> <li>• Seeks an enriching, authentic and educational experience as part of the vacation</li> <li>• Seeks customized vacations integrating spontaneity</li> </ul>
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### **Consumer Travel Trends**

Visitor responses to the survey indicate that the travel product developing informally and formally in the NEK is consistent with consumer travel trends. Trends can be used to inform design of travel products. Researchers and marketers alike track trends. According to Professor Rod Warnick of U. Mass Amherst who tracks trends in outdoor sports, activities that are growing consistently among consumers and which are notable for the NEK travel products include:

- Hiking and Exercise Walking
- Backpacking
- Snowmobiling
- Canoeing and Kayaking (steady and growing in frequent user sector)
- Off Road Bicycle Riding (Mountain Biking), and
- Camping

Other trends in consumer behavior that are relevant to tourism offerings in the NEK include:

- People are striving to live healthier lifestyles, especially the baby boom generation,
- People want choices; therefore a menu of activities is most likely to attract the greatest number of visitors,

- People want something different that brings them together to build meaningful relationships be it with family or friends,
- People pulled to vacation in natural destinations want to slow down, relax, breath the fresh air and stay physically active.

These characteristics are consistent with more recent research on travel market trends reported by Yesavich, Pepperdine, Brown and Russell ([www.YPBR.Com](http://www.YPBR.Com)). According to Peter Yesavich, a well known tourism market researcher and consultant, consumers have become much more value conscious during the economic downturn and consumers are seeking to enrich their lives with something new and different when they take a vacation.<sup>2</sup> The travel product in the NEK meets both of these requirements.

An important emerging social value that is greatly influencing travel Yesavich has labeled “Togetherring.” Consumers are more likely than ever to take a special trip to spend time with family. And, consumers exhibiting the characteristics of the new tourist are tired of the same old trip. According to Yesavich, 59% of the consumers he surveyed welcome more novelty and change in life. He suggests that travel is now all about the experience.

- 40% of those surveyed are bored with their lives
- Those surveyed by YPBR want to cure boredom through the travel experience,
- 75% agree that they’d like to go somewhere new.

Furthermore, according to Yesavich, since consumers are squeezed for time, they want more from their vacation experience and right from the start. They don’t want to take the time to figure out what they are going to do once they arrive at their destination. They want to have it planned. And they are willing to pay more to have a plan that meets their specific requirements rather than a plan that is generic.

Consumers are also shortening the timeframe between when they plan and book a vacation and when they actually take the vacation. Weekend trips of four nights or less are still the norm, with 54% of travel tied to a Saturday night. And many consumers are making plans spontaneously, no more than a week in advance for these short, but more frequent weekend getaways. Extended vacations are most likely to be taken in Vermont during the summer months, with some winter vacationers staying five or more nights as well. However, only 23% of the travelers, according to Yesavich, take extended vacations of five or more nights. While consumers will plan extended vacations further in advance than weekend vacations, they have shortened the timeframe significantly. Since consumers traveling to Vermont most likely drive, the need to plan well in advance is not required.

Travel providers in the NEK have an opportunity to take advantage of these shifting trends. Products need to be redesigned to meet the quality, convenience and value expectations of the traveling public, marketing needs to be designed so that ad placement and promotions are timed to meet the new booking patterns of the consumer, and service

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<sup>2</sup> From a speech by Peter Yesavich at the International Hotel/Restaurant Show, November 2003 in New York.

quality during the visitor experience needs to be continuously improved so that visitors are wowed by the relationships they build with their hosts.

### **Factors Pushing and Pulling Consumers to the NEK**

Consumers are motivated to visit a destination by two complementary stimuli known as pull factors and push factors. Pull factors are those elements of a destination that lure the visitor away from home. Pull factors may be natural assets or they may be man-made assets. Push factors, on the other hand, are internal factors that motivate consumers to behave in a certain way. Push factors are instrumental in the emotional side of decision-making. Push factors motivate the consumer to seek out vacation destinations that will satisfy internal drives such as need for relationship. When a consumer identifies a destination that has pull factors that will match internal desires, a possible solution to their problem is identified. Push factors that fit the profile of the visitors responding to this survey include the need to experience nature, the need to reduce stress, the need to build relationships, the need for quiet, and the need to feel physically fit. Therefore, marketing messages associated with the travel product in the NEK need to appeal to the emotional needs of the target consumer to be most effective.

### **Core Assets and Primary Attraction**

Results of this research process clearly demonstrate that the core assets of the NEK which pull consumers to the NEK are natural assets; mountains, lakes, pastoral landscapes and forested areas. These assets are the core features of the region, its primary attraction. The problem, however, is that these features are present all across Vermont and New England. The branding process must include nature, of course, but also must go a step beyond nature in identifying what it is that customers can relate to when considering the NEK as their vacation destination.

Secondary attractions that people visit and the activities that visitors participate in can give us an indication of what it is that satisfies the visitor during their stay in the region. These satisficing activities are what consumers consider as the benefits of choosing a vacation. Benefits satisfy the “push factors” or emotional needs consumers are seeking to have satisfied from a vacation experience. Identifying the benefits is the key to developing an image of the NEK that will speak directly to the emotions of the target market. Responses to the open ended questions on the survey provide an indication of the benefits as perceived by the visitor.

### **Benefits of Visiting Friends and Relatives**

Results from this survey indicated that nearly 10% of U.S. visitors to the NEK and almost 12% of Vermonters vacationing in the NEK visited friends or relatives. Another 10% of those U.S. visitors to the NEK said that they chose the NEK as a destination for a family event. This is a slightly lower percentage than reported by the UVM Tourism Data Center for visitors visiting friends and relatives in Vermont but is consistent with the notion that a large number of visitors come to the state to visit people they already know.

In the case of these survey data, families traveled to the NEK for special occasions. The push factor satisfied by visiting with friends and family is the opportunity to build relationships. Family reunions, special celebrations such as weddings, and just weekend get-aways with family result in stronger bonds between people. These benefits can be communicated to potential visitors through marketing and promotional strategies.

### **Benefits of Scenic Beauty, Quiet Back Roads, Small Villages**

Scenic beauty, nature, and lakes, fall into the category of the primary attraction that draws people to Vermont. The benefit of this pull factor, nature, is quiet non-commercial places that provide an opportunity for visitors to experience the restorative powers of nature and to connect with human scale development. Nature refreshes visitors' outlook on life and encourages them to renew relationships. Quiet back roads benefits visitors because they have the potential to see more wildlife, walking or riding bicycles is safer than in the city, and the scenery is unimpaired by housing development. The benefits of visiting small villages may be that of providing the visitor with the experience of a place that represents a time when life was simpler, people were friendlier, and the built environment was of a more human scale. The benefit of having breakfast in a small village café or restaurant in Lyndonville or E. Burke is that on the second visit the tourist will feel right at home!

### **Benefits of Active Vacations**

The apparent strength in the NEK that pulls people to the region is a combination of the primary attraction, nature, and the abundant opportunities to experience nature up close through outdoor activities. A large percentage of the visitors responding to the surveys indicated that they were participating in physical activities while on vacation. The benefits of an active vacation include staying physically fit and healthy, enjoying nature close-up rather than from a motorized vehicle, stretching personal limits through soft adventures, and spending fun time with friends and relatives while also participating in outdoor activities. These benefits are underscored by the survey results with a great many people suggesting that they are not taking advantage of passive activities such as visiting historic sites, participating in cultural activities, playing golf, or shopping for antiques. Not one person mentioned going to shows, to movies, to theater, etc. Only a few mentioned golfing which is a passive activity and draws a significantly different market segment than the Centric-venturer or Near-venturer category as described earlier in this report.

## Identifying a Brand For The NEK Region

It is important to develop a consistent image that can be communicated clearly to target markets that accurately represents what the visitor will experience while vacationing in the NEK. Although there are vast tracts of wilderness in the NEK, most visitors do not access nor do they desire to access the wilderness. Therefore, the branding strategy recommended in this report softens the image of the NEK to better reflect the visitor profile described herein.

While the current brand of the NEK in the minds of many consumers features images of wilderness, vast tracts of forest, moose, back country trekking, and wilderness camping, this image is not what the respondents to the survey portrayed as their preferences. The visitors who responded to the survey are clearly seeking a NEK vacation that will put them in touch with nature, but on a human scale. The rugged, wilderness image may attract the young adventurous visitor who didn't respond to the survey. However, the image that is reflected in the survey responses suggest features of a pastoral landscape with intermittent wilderness; a refined image of nature with lakes, streams, farm fields, quiet back roads and small towns that place humans clearly into the natural picture. In the revised brand, wilderness should become a small part of the picture, taking a role as a backdrop of forested landscape and high mountain ridges within view but beyond human settlement.

The main features of the NEK, its natural attractions, have been identified by the survey respondents as,

- Lakes,
- Nature,
- Wildlife,
- Quiet back roads, and
- Views of nature.

Images that reflect these attractions that could be employed in a branding strategy include:

- The loon – independent yet visible, serene, mysterious, beautiful, shy, playful,
- Lakes and Rivers – plentiful, cradled between hills and mountains, nurturing, teeming with life,
- Trailheads where groups of hikers anticipate exploring the back country
- Small groups of people or couples walking on back roads
- Forested landscapes with interludes of pastoral scenes
- Built environments with architectural features
- Small town life with stories of creativity and independence

Benefits are often difficult to summarize. Potential benefits that could be included in the branding message resulting from a vacation in the NEK for the target consumers include:

- Spend quality quiet time together with relatives and friends,
- Explore nature,
- Exercise in a natural setting,
- Build relationship with loved ones,
- Experience soft adventure,
- Relax in a quiet, non-commercial environment,
- Renew and rekindle relationships,
- Refresh outlook on life,
- Enjoy the beauty of the region.

Words that represent these benefits include:

- Refresh,
- Reunion,
- Renew,
- Revive,
- Renewal,
- Rejoice,
- Rekindle, and
- Relax.

These words represent what the current customers to the NEK are seeking and experiencing during their vacations. They can be used to develop a brand that represents the image of lakes, nature, family, and active vacations. The image of a loon, small groups of canoes on a lake, a couple riding bicycles or walking on a quiet road, or a family reunion in a garden setting, reflects words such as renewal and rejoice, and could be combined with phrases that would complement the images.

A shift in the brand concept from wilderness nature to a softer image of nature does not necessarily mean that the story of humans in the NEK must change. On the contrary, the human story with its small towns, quiet back roads, artisans, specialty foods, farmers, and all the other rugged human elements of life in the NEK should become the medium through which to tell about the natural attractions in the NEK. This is how the tourism product can be represented in the marketing and promotional messages. For example, stories of floods lead in to the features and benefits of the lake country; stories of the railroad lead in to the features and benefits of Island Pond, and stories of pioneers lead in to the features and benefits of farm based accommodations.

To integrate this new brand identity into product development and marketing tactics, marketers should employ natural attractions that are easily accessible to the visitor and that are interspersed with human settlement. Images of quiet lakes with people canoeing, small town cafes with people eating baked goods, back roads with people pedaling

bicycles, loons on lakes, and farmers fields should replace the moose, the back woods, the remote peak and the extreme sports one typically sees in much of Vermont’s advertising campaigns.

Marketing and promotional materials should somehow include the elements of life that make the NEK unique as part of the “story line” being told to differentiate the NEK from other destinations in Vermont. By weaving together a story that differentiates each enterprise, community, and place in the NEK, the marketer will come up with a unique selling point that will clearly indicate to consumers the differences in features and benefits of their tourism product

### **Branding “Places” Consistently with Regional Brand**

Marketers in the NEK should realize that branding a place rather than the region as a whole, will be easier to engrave on peoples memories.

Creating “flagship” destinations or attractions that will draw visitors to the region may be the best way to increase tourism in the NEK. First time visitors will more likely stick to the main attractions and destinations, but on subsequent visits may begin to explore the more remote and obscure aspects of the NEK. Flagship destinations can provide opportunities for visitors to interact with tourist information providers who can guide visitors to other area attractions or accommodations and activities. Informal “flagship” destinations already exist such as Cabot Creamery, Lake Willoughby, E. Burke and the Fairbanks Museum. Flagship destinations could also include key lodging properties, popular restaurants, main towns or mountain resorts such as Jay Peak Resort.

Connecting the consumer to place rather than region is critical in building an emotional bond between the consumer and the NEK. Places like Lake Willoughby and Westmore, Darling Hill Road and E. Burke, Island Pond and Brighton State Park, Crystal Lake and Barton, Joes Pond and Danville are all places people can find on a map, read about in the local newspaper, and tell stories about with clarity. Through the visitor experience or the advertising experience, people will develop an affinity

Selling tourism is not a science. Testing new ideas is the only way to find what will work. Some suggestions for placing the NEK in the mind of potential customers include:

- Highlight the NEK as a place to visit on the way home to Boston or CT. A visit to the NEK can top off a vacation to Vermont rather than the main destination of the trip.
- Create and promote a vacation package that highlights the NEK as a get-away destination with hassle-free vacation planning and an all- inclusive experience with a lot of personal choices available.
- Encourage business travelers to enhance teamwork and creativity with a business retreat combined with soft adventure in the heart of the NEK.
- Highlight Brighton State Park, one of the Ten Best in the U.S.

The town of Barton is a good example of a place striving to brand itself in alignment with the brand of the NEK. The primary attraction is Crystal Lake, the story is of the town, and the tourism providers each have a story to tell that differentiates Barton from other towns in the NEK.

for specific places.

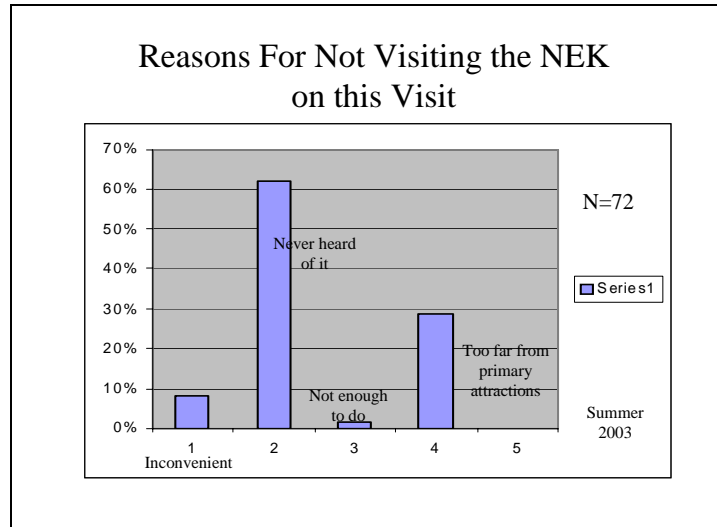
## Enhancing the NEK Tourism Product

The NEK is selling an intangible experience that appeals to a growing market segment. People, however, have difficulty identifying with the concept of a Northeast Kingdom in Vermont as illustrated in the survey of visitors outside of the NEK.

Recommendations for product enhancements are outlined in the following section. Some of the comments from respondents to the survey are helpful in reflecting on the tourism product in the NEK. Visitors to the NEK who took the time to complete the survey were inclined to comment on the tourism product. Most of the comments were quite favorable. Comments such as,

- “Our lodging experience was perfect. The kids had plenty to do in a very unscheduled format. Plenty to explore or just relax. Very low key, stress-free. No urgency to accomplish anything. Our hosts and their staff were wonderful.”
- “It’s very relaxing as opposed to the hectic life in a somewhat big city.”
- “Toured your beautiful NEK with friends, enjoying the tranquility of the back roads.”

A number of respondents, however, were concerned with the appearance and/or condition of the travel product in the NEK as well as with the perceived lack of variety in accommodations and restaurants.



Challenges revealed by the surveys and interviews can be broken into a number of themes.

1. People have trouble relating to the term “Northeast Kingdom” and therefore it doesn’t stick in their mind when they see marketing materials or promotional messages.
2. People aren’t convinced by marketing materials or promotional messages that the benefits to visiting the NEK are different than the benefits to visiting other parts of Vermont.
3. People don’t understand how the benefits associated with visiting the NEK match their vacation requirements.
4. Secondary attractions of the NEK are not well defined or described for the consumer and activities are not featured as customer friendly.
5. Secondary attractions are not packaged for easy use by the visitor.
6. The consumer must work hard to create a vacation itinerary for the NEK so they select destination that appear to have a more cohesive program for visitors.

The constructive feedback included the following comments:

- “several main roads are in deplorable condition. (ex. Rt. 16 from Barton to Hardwick and parts of Rt. 5).”
- “more motel accommodations, handicap accessibility to public places.”
- “Restaurants adequate for small town but for tourists might like more variety.”
- “The road from the highway to the Wildflower Inn runs through Lyndonville. I noticed a number of buildings that needed paint and/or repairs.” “The town could look a lot better.”
- “More coordinated effort to let canoeists and kayakers know of the beauty and location of the wilderness and remote ponds.”
- “More restaurants with outdoor terraces.”
- “A few more restaurants.”
- “Better signage for attractions.”
- “While hiking the shore trail at Lake Willoughby I was very upset with all of the camp remnants left behind.” “It was a disgrace.”
- “If we had more information about kids activities, then we would gladly have made more of a stopover here.”
- “[The] lack of public toilets was noticed.” The owners of the --- country store were very rude and I would tell all friends to avoid --.”

Consumers with the profile depicted by the survey respondents thrive on choices, customization and personalized services. While this type of consumer will search for tourism choices with value, they will not hesitate to pay a premium for a product that fits their personal requirements. Providing choice, however, means well-informed staff, flexible policies, and creative problem solving.

Two case studies are presented in the side bars. In both of these case studies, marketing has played a key role in establishing the expectations of the visitors. Marketing portrayed the experience in a different way than was achievable in reality. As a result, the visitor expectations were not met and satisfaction levels suffered. Marketing needs to be consistent with what the typical visitor will encounter during their visit to the NEK.

#### Case Study

Visitors to the NEK are not looking for high levels of difficulty in their outdoor activities. Rather, a low level of difficulty will satisfy the majority of visitors to the NEK.

The typical visitor is like Bob and Sarah who prefer to stay at a rustic inn, enjoy the nice meals, relaxing environment and quiet time together. Bob and Sarah bring their mountain bikes (actually all terrain bikes) so that they can ride on the well promoted trails outside the door of the Inn. However, once on the trails Bob and Sarah are riding down single track, pushing their bikes more than riding them. They return frustrated because their expectations of a light adventure on the mountain bike trails had turned into a hair raising adventure. No one at the inn informed them of the level of difficulty on the trails and they weren't able to read the map well enough to know really which way to go. They were overheard during breakfast complaining to each other and no one in particular about the challenges and hardships experienced the day before.

The scale of tourism in the NEK lends itself to making each customer feel special. Customizing each experience through personal interactions and going the extra mile will

endear customers to the NEK for life. The value of a customer for life is huge. Therefore, the first experience visitors have with a destination must be risk free and delightful. Developing a product that will meet this requirement should be built on the core assets of the destination and on principles of customization and transparency of the partnerships relative to the visitor experience. It is relatively easy to customize the basics of a lodging experience such as type of room, size of bed, type of coffee, level of service, check-in process, etc. Tourism providers in the NEK, however, must go beyond the basics and weave in other experiential options for the traveler.

Tourism professionals need to design experiences that can be delivered well to the visitor. Just because the region has abundant resources doesn't mean that the typical visitor can access those resources with ease. And the tourism professionals must realize that different visitor types will be more or less likely to be prepared to access the natural resources. For example, Vermonters visiting the NEK indicated that they participated in fishing more often than did those respondents from out of state. Therefore, it is reasonable to believe that Vermonters bring their own fishing gear with them on holiday while those from away may want to fish but do not either own fishing gear or remember to bring it. If fishing is promoted as an activity one would participate in while visiting the NEK, then visitors may be inclined to think that fishing equipment would be easy to find at stores in towns located near the fishing areas. Canoeing and other boating activities would require similar services. While a higher percentage of Vermonters will participate in canoeing activities while visiting the NEK, it is reasonable to assume that visitors from out of state would be inclined to take a canoe paddle if canoes were easily accessible.

### **Convenience, Customization, and Choices = Value**

Value added vacation experiences begin with hassle-free vacations for couples and families with children. The regional economic development association should consider encouraging micro-enterprise development of tourism suppliers so that choices for activities will be easily accessible to the visitor staying in area

Bob and Sarah didn't even try canoeing while visiting the NEK. However, had they brought their own canoe it would have been difficult for them to know exactly where to put in, where to finish, and how to find transportation back to their vehicle. Bob and Sarah were lucky while Doug and Lisa weren't so lucky. Doug and Lisa decided to spend Lisa's birthday in the NEK over a nice late summer weekend. They called ahead to a small lodge which had cabins for rent, explained that they wanted to bring their dog, and were planning on canoeing for the day. The owner said that the dog would not be a problem and that they could arrive any time in the afternoon following their canoe. Doug and Lisa arrived in the NEK late morning on a beautiful Saturday. They had maps of the rivers and knew approximately where they would like to canoe. However, they hadn't planned on transportation from the end of their canoe paddle back to their vehicle. They had assumed that there would be an operator or two along the way offering shuttle service. Much to their dismay they couldn't find an adequate place to put in nor did they ever see a shuttle service advertised at sport shops or on homes. Doug and Lisa decided to have lunch in one of the small towns, drive around a bit and then just go to the cabin they had reserved for the night. Upon arrival at the cabin the owner came out, greeted them and took a look at their dog. The owner's dog came out and barked which also started the guest's dog barking. The owner then told Doug and Lisa that they weren't welcome to stay in the cabin because of their dog. Doug and Lisa left the NEK to celebrate Lisa's birthday in Stowe.

accommodations and campgrounds. People who are on vacation do not want to travel far to find rental equipment nor to find activities. Transportation, canoe rentals, bicycle rentals, and guided hikes can be delivered right to the door of the visitor. Bicycle racks and canoe racks can also be made available at the doorstep of the visitor so that they don't have to look long and hard to find sports shops with rental equipment. To best and most effectively customize the vacation experience in the NEK, businesses should consider forming partnerships that are transparent to the visitor and profitable to the enterprise owners. Partnerships between outdoor gear and equipment suppliers and lodge or campground owners would provide visitors to the NEK with ready access to equipment and gear that will allow them to access the natural attractions with ease. This type of customized service is exactly what today's traveler is looking for. Other partnerships may be entered into between story tellers, craftspeople or artisans and lodge owners, restaurants and farmers, outdoor guides and campgrounds, day camps or day cares and lodge owners, and horse stables and lodge owners.

Guests staying for more than two nights may enjoy evening entertainment, preferably with a learning component for both the children and the adults. Forms of this type of entertainment include storytelling, natural heritage presentations, astronomy presentations, nature walks, etc. Acoustical music presentations, singing around a

## **Creating Packages**

### **High Season Packages**

Value added packages to increase revenues coming from return visitors are an opportunity to increase economic activity throughout the region. One way to add value to the visitor experience is by providing opportunities for guided and active engagement in nature. Multi-sport activities like those offered to visitors by the Vermont Adventure Company is one example of an effective value added tourism product.

### **Shoulder Season Packages**

Highlighting shoulder season peace and quiet, fireside chats, and guided learning opportunities such as cooking classes, wine and food pairings, nature drawing, nature photography, wood working, etc. will lure couples to the region. By linking together a variety of learning activities and soft adventure activities, the region will be an attractive place for multi-day shoulder season vacations.

### **Low Season Packages**

There are those who love to be alone, to rekindle relationships or to just read a good book by the fire.

### **Multi-day Family Vacation Packages**

Requirements for the family planner include:

- Time with children,
- Outdoor activities,
- Natural attractions,
- Healthy food,
- Guided learning experiences,
- Safety and security,
- Comfortable accommodations and clean facilities,
- Family activities as well as occasions for parents to be alone.

campfire, and moonlight canoe paddles are also forms of entertainment that provide a learning opportunity, a chance for families to get close, and are interesting for the couples traveling without children as well.

Parents traveling with children would most likely enjoy time together without children. Evening babysitting arrangements can give parents who live a fast paced, professional life, an opportunity to enjoy each others company with a glass of wine listening to some acoustical entertainment.

### **Community Revitalization and Partnerships**

Successful tourism development in the NEK will require partnerships between tourism providers and revitalization of tourism infrastructure in downtowns if the image being promoted is to reflect accurately the visitor experience. Revitalization will not only meet requirements of the visitor, but will more importantly meet the lifestyle needs of the people living in the communities.

Flagship attractions such as Maple Grove, Cabot, Brighton State Park, Fairbanks Museum, White Caps campground, Lake Willoughby and other premier attractions should become partners in marketing and promoting the small businesses that make up the majority of NEK tourist enterprises. These flagship attractions could provide opportunities for promoting tourism businesses in more remote sections of the NEK. Successful models of information services are currently operating in downtown Newport and Lyndonville, as well as on the interstates. It is knowledgeable people who will successfully introduce visitors to attractions off the beaten path and provide the visitor with the reassurance and self-confidence to explore the NEK.

Accommodations need to reflect the brand of the NEK as well. Many accommodations in the NEK are outdated both in appearance and in operations. Upgrades and renovations are very expensive. Economic incentives such as low interest loans, economic development grants, etc. should be made available to owners and potential investors to help motivate investment in tourism enterprises. If downtowns and the accommodations that are located in the downtowns are not upgraded to meet the requirements of the new tourist who is most likely to visit this region, the potential for growth is severely limited.

Signage is very important to the visitor. Numerous respondents to the survey commented on the limited signage in the NEK. In gateway communities to the NEK it is very important to let visitors know that they have entered a unique region of Vermont. Unique signage with symbols of the NEK brand will help differentiate the region from the rest of Vermont and indicate to visitors that they have entered different region of the state.

## **Building Relationships with Consumers Through Effective Marketing**

The NEK is in a strong position to attract more visitors with the profile described in this study. While retaining the existing customer base should be the number one priority, new customers with similar profiles should be the next focus of marketing efforts.

Building relationships with would be travelers with the profile of likely visitors to the NEK takes consistency and boldness, otherwise the message may get lost in the crowd of nature based tourism destinations in New England and Vermont.

People exhibiting the Centric and Near-Venturer consumer profile described in this report respond best to personalized messages and customized vacation itineraries. It is important, therefore to produce marketing materials that are meaningful and that matter to this target audience. All marketing and promotional messages should strive to connect the receiver to the story of the NEK and the communities or enterprises that are the focus of a campaign. Travel decision makers are typically women, so the story should be tailored for women if the target market is families or traditional couples.

Stories should be constructed around themes that reflect the primary assets of the brand such as nature and landscapes with a human scale. Themes that are place based such as the story of Barton or the story of Darling Ridge or the story of E. Burke can evoke emotional connections to benefits of the brand that will motivate the receiver to search for solutions to their push factors. For example, if a series of ads in a community newspaper feature the town of E. Burke, the storyline can revolve around building bonds with someone while cycling on open trails and having a simple meal on a bench at the general store. The story can build over time as one ad highlights a bed and breakfast or a restaurant in E. Burke.

It is expensive to build lasting relationships with the consumer. Therefore the marketer must decide how to allocate resources for promotions. Marketers need to identify which medium, message, and location will have the best potential for success. Each type of promotional tactic attempts to create a perception of credibility to the consumer. The chart below shows that word of mouth among friends and family has the highest credibility rating among consumers while television and magazine ads have the lowest level of credibility among consumers. When deciding on the promotional mix, the marketer needs to achieve a balance between high credibility yet limited numbers of consumers exposed to the message, with low credibility yet large numbers of consumers reached by the promotion. Often, more meaningful relationships are developed from promotional tactics that reach a smaller number of consumers, but subsequently result in higher sales success.

Therefore, when considering marketing tactics, consider the quality of the relationship as well as the quantity of consumers reached in the campaign.

- friends or family -----High Credibility
- presentations and exhibits
- third party articles
- travel guides
- direct mail
- web sites
- television shows
- television ads
- newspaper ads
- magazine ads -----Low Credibility

Timing of ad placements and promotional campaigns is clearly an important part of a marketing strategy especially given the fact that consumers are shortening their planning time-frame. Before each season begins, marketing tactics should begin to introduce potential travelers to vacation opportunities so that the consumer begins to seek solutions to internal push factors. Once the season gets underway, weekly placement of messages using a variety of tactics will be most successful in making a lasting impression on consumers who will be making last minute decisions to travel. Websites need to be accurate and up-to-date with events, weather forecasts, room availability, and attraction information so that consumers have an opportunity to customize their vacation choices.

Tracking marketing results is very important so that businesses and associations know how effective a specific tactic is in luring customers. Tracking the results of television and radio ads is very difficult if not impossible. However, tracking results from ads in community newspapers, direct mail campaigns, presentations and trade fairs, and third party articles is fairly easy and reliable. Tracking marketing dollars and the effectiveness of tactics will result in better yields in the long run.

### **Marketing Partnerships Outside of the NEK**

Another tactic for low cost marketing is to partner with organizations whose customers or employees may be representative of the target audience for the NEK. Organizations in key target markets that may be open to partnering with businesses in the NEK include:

- Fitness and Health Clubs
- Alumni Associations
- Day Spas
- Health Food Stores
- Tennis Clubs
- Specialty sporting goods stores
- Environmental Centers
- Recreation Programs
- Educational Institutions

## **Market Penetration**

Since word of mouth is still the best and most credible method for promoting a destination, every customer counts. Your best customers are your best marketers. This is why it is important to promote deeply and consistently in the prime zip code areas where existing customers reside. Concentrating on markets where current customers originate will be the best use of scarce marketing dollars for NEK tourism businesses and the NEKTTA. Digging deeper into the market pool is more cost effective than trying to open new markets. Employing a simple zip code analysis such as illustrated in this report will help marketers identify key places of origin to target. It is important that businesses in the NEK identify which zip code areas are working best for them and then focus marketing efforts in those zones. Once people who have already visited the NEK begin to recognize the places in the advertising and promotions, the level of interest in the community will radiate out from those who have already had a good experience visiting the NEK. This market penetration strategy can be complemented, when budgets allow, with a market diversification strategy sending messages into other zones where people exhibiting similar demographic and lifestyle characteristics reside.

## **Specific Target Markets**

### **Canadians**

Numerous visitors passing through the Vermont Information Centers on Routes 93 and 91 are Canadians traveling either from Montreal or Toronto on their way to and from the east coast. Many also travel through Vermont on their way to Nova Scotia and Cape Breton Island. There is an opportunity to enhance the travel experience of Canadians by developing the brand image of the NEK as a place for Canadians to spend two nights on their way to and from their destinations elsewhere in the U.S. or Canada. Two night packages for the Canadian market as they pass through the state on their extended holiday may succeed in attracting more of these visitors. Once they become familiar with what the NEK has to offer, and how convenient it is to the Montreal metropolitan area, Canadians may select the NEK for shorter, more frequent holidays. Tapping into the skier market at Jay Peak by co-branding and working with Jay Peak as a partner, may help to raise consumer recognition in the Montreal market for NEK travel opportunities during the summer months.

### **Vermonters**

70% of the summer Vermont visitors to the NEK stay two or more nights. The primary reason for choosing the NEK again points to the primary attraction of Vermont in general, and that is nature. The main reasons Vermonters chose the NEK were its quiet, non-commercial appeal, its scenic beauty, the lakes and nature. While 16% of the Vermonters responding to the survey stated that relaxing at the destination was a primary activity, Vermonters also participate in a variety of activities while visiting the NEK.

Since Vermonters are engaging in outside activities such as hiking, fishing and boating, it may be a good strategy to send the message across Vermont especially to Chittenden County, that the “lake country” of Vermont is waiting for you!! Fishing, boating, especially quiet boating such as kayaking and canoeing, as well as floating down rivers in rafts or inner tubes, is just a short distance away from home. This will appeal to those Vermonters seeking short, more frequent, weekend get-aways.

### **Business Travelers**

Business travelers are a small portion of the travel market in the NEK. They prefer chain hotels such as the Comfort Inn or Derby Super 8. Building relationships with business travelers may result in new family business if the business traveler profile is consistent with the profile of the target market. Business travelers frequently stop at information centers for the rest room and directions. If they can be persuaded to take information about the region with perhaps an incentive built in to the package specifically for business travelers who discover the region while traveling on business, then the business traveler can become a conduit for new summer and winter visitors.

### **Campers**

Surveys were passed out to Vermonters staying at large campgrounds in the NEK such as Prouty Beach Campground in Newport and Sugar Ridge Campground in Danville. There were no responses from visitors to these campgrounds, which may suggest that a different type of visitor from Vermont is visiting these sites. This visitor may be interested in entertainment while visiting the NEK participating at Sugar Ridge in activities such as miniature golf and swimming in the pool. This group would consist of a younger parent with children under 12 as the norm. This group is not perhaps taking advantage of the natural attractions, but rather is interested in a family get-away with a theme park type environment. The lakeshore, and also the number of other park like activities that young children can participate in attract those visiting Prouty Beach Campground as well.

While camping at smaller private campgrounds and at more rustic state campgrounds is popular, the camper profile for these sites as reflected in survey responses, is consistent with the visitor profile of those staying at small lodges, cabins, and bed and breakfasts. Responses from campers staying at Brighton State Park and Bel View Campground were consistent with the greater number of responses of people staying at lodging facilities. The zip codes were also consistent with the norm, as were the types of activities people participated in. Hearing the call of the loon was cited a number of times as one of the most satisfying experiences during the camping holiday at Brighton State Park.

### **Internal Marketing**

Once the customer is in the NEK, this is considered the occupancy stage of their visit. At this time it is important to provide information regarding attractions and other services that visitors may like to know about. Information in the form of brochures and written materials works to a point. However, to be really effective personal relationships need to

be built. In key attractions and points of interest, information professionals would be the most effective form of helping visitors identify places that will satisfy their personal requirements while on vacation. The information centers on the Interstate work well for those traveling on the Interstate, but as mentioned previously, information professionals could be placed at major attractions during the busy season. One cannot expect that the staff at Cabot or Maple Grove, for example, will have the time to provide information to visitors during the busy season. During the busy season is when visitors need to be dispersed to less traveled places so that everyone can benefit from the influx of visitors.

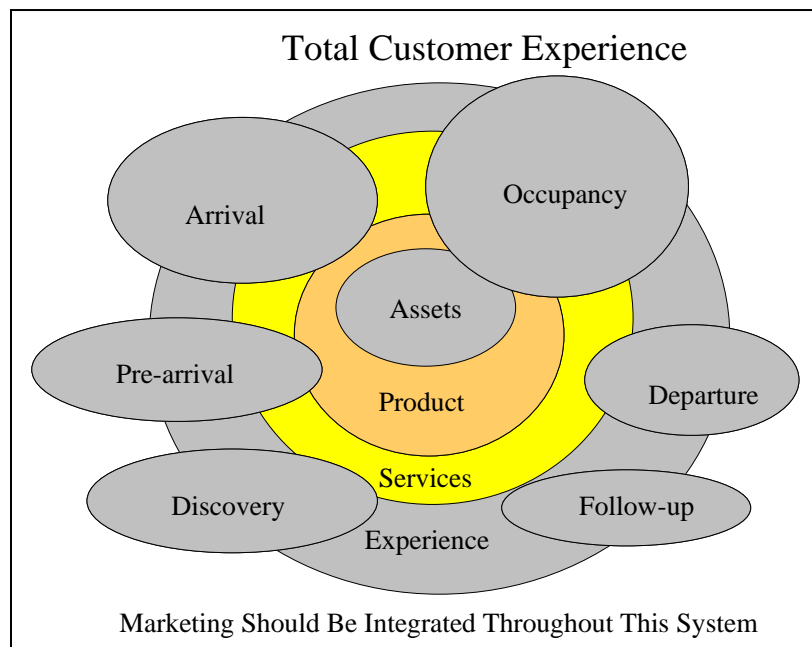
Lodges and Campgrounds can also provide customized visitor information and advice resulting in satisfied customers. Well-informed staff that are up to date on events and activities geared towards the visitor, can assist visitors in customizing their experience. A concierge service available to guests in the morning to assist with daily planning would delight visitors to the NEK.

### Marketing and Stages of the Visitor Cycle

The value of a customer over a lifetime is so large, that the first experience needs to be risk free and delightful. Subsequent experiences must also satisfy the visitor otherwise they will go somewhere else. According to Peter Yesavich, return rates continue to decline as the consumer seeks new experiences. Tourism providers in the NEK must focus on quality service in order to succeed in attracting repeat visitors. One way of designing a strategy to successfully satisfy first time visitors and a way of pulling all of the concepts discussed in this report together into a meaningful model that can be applied to any tourism destination or individual tourism enterprise is by viewing the customer experience through the lens of the visitor cycle.

The stages of the visitor cycle, as depicted in the chart below, include discovery, pre-arrival, arrival, occupancy, departure, and post-visit follow-up. Customer needs must be satisfied in each stage of the visitor cycle.

Marketing plays a key role in each of the stages but with an emphasis on different marketing tactics. For example, in the discovery stage of the visitor cycle, it is the marketing materials that will influence the behavior of the potential customer. Marketing materials must speak to the emotions of the



viewer, highlighting the features and benefits of a visit to the NEK. The pre-arrival stage, on the other hand, is characterized by consumer anticipation, information collection, reservations, and perhaps contact with area representatives. In this stage, visitors will be seeking accurate information that is consistent with the materials reviewed in the discovery stage. Information personnel must be knowledgeable, friendly, and good sales people during this stage of the visitor cycle.

Since the tourism product is an emotional experience, the relationship between the guest and the host is very important. During the occupancy stage of the visitor cycle the host has an opportunity to help meet the expectations of the guest. Therefore, it is important from a marketing perspective that the host develop a relationship with the guest so that the guest is more likely to provide feedback to the host that will help the host determine how best to meet both the emotional and rational needs of the guest. Since tourists leave their primary destination to visit attractions and other sites during the day, it is important to have tourism professionals interacting with the visitor at each step in their day. Information providers, retail sales people, service station attendants, waitstaff, and others all can make a big difference in the relationship building process with visitors. If the visitor has a great day outside the destination the likelihood of returning to the region is much higher than if they had an average day. Customers continuously reflect on the value of the tourism experience during the occupancy stage of the visitor cycle. Therefore, it is important that the tourism provider pay close attention to how the visitor is feeling during the occupancy stage in order to be responsive to visitor needs and expectations.

The departure stage can be very abrupt as when a guest finishes a trail and goes directly to their automobile or it may be drawn out such as when a guest returns rental equipment, pays a bill and then goes to their car via the front entrance of the facility. This is the last opportunity for a representative of the business to interact directly with the guest and leave a lasting impression. A fond farewell or good day with a thank you and “look forward to seeing you again soon,” is a great send off for a visitor.

The follow-up stage of the visitor cycle is an opportunity for the business to continuously build the relationship with the customer. Customer friendly communications such as newsletters, cards, special invitations for previous guests only, and targeted advertising are a few of the methods to further develop the relationship with the customer.

### **Service and Product Quality**

Visitors to the NEK who responded to this survey are fairly sophisticated travelers and as such require a professional level of service and quality product offerings. They require prompt and friendly service and a well informed staff. However, they may not be receiving the level of service they are expecting. I recommend that NEKTTA join with other tourism organizations, retail shop keepers and service station owners to provide on-going customer service training or technical assistance to those interacting with the traveling public. Although this tactic has been tried in the past, it is important to keep trying since the success of the tourism industry in the NEK is dependant on customers

being satisfied with their interactions with tourism providers. Seasonal staff turnover rates can be high in the tourist industry, and therefore, ongoing training is imperative to maintain consistent service quality.

## **Conclusion**

Marketing is the process of building relationships with consumers. Embracing the concept of target marketing and building relationships with specific segments will help the small and medium sized businesses in the NEK succeed. Relationships are built one at a time. Speaking directly to specific segments requires the marketer to understand the consumer very well. The consumer is seeking customized vacation products. The core assets of the NEK provide abundant opportunity to customize vacations for the types of consumers described in this report.

This study is just the beginning of a long process of understanding the visitor to the NEK. The brand identity suggested in this report needs to be discussed, refined and reborn so that the stakeholder groups in the NEK own the brand identity. The strategy outlined in this report can go no further until goals are established, tactics are developed, timelines are put in place, money is allocated, and most importantly, people commit to the hard work ahead. The work ahead for tourism professionals in the NEK is long. The NEK would benefit from a tight consortium of tourism providers who can develop clear goals and successful implementation strategies that reflect the ideas developed from stakeholder meetings. The Northeast Kingdom Travel and Tourism Association is in the beginning stages of its lifecycle. An association that is well organized can help insure that visitors to the NEK are presented with clear choices, accurate information and consistency in products and services. And most importantly, a single voice like that of Northeast Kingdom Travel and Tourism Association, representing tourism providers in the Northeast Kingdom, would have the capacity to compete in the very complex and competitive tourism marketplace.