

The Effectiveness of the 1998 Vermont Fall Foliage Television Advertising



**Prepared for
The Vermont Department of Tourism and Marketing**

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Introduction and Methodology

- This project is one of eight scheduled projects in 1998 - 1999 funded through the Vermont Department of Tourism and Marketing and conducted by the University of Vermont.
- The purpose of this study was threefold. First, it was designed to measure the ability of the fall foliage television campaign to influence visit intentions and perceptions of Vermont as a fall vacation destination. Second, it was designed to diagnose the strengths and weaknesses of the campaign. Third, it was designed to measure its effectiveness relative to the Maine fall television campaign.
- A sample of 2,000 names were drawn from the Boston MA, Albany NY and Hartford CT markets. Half of these names were from households in the “Metro Achiever” segment and half were from the “Small Town Gentry” segment as described in "A Geo-Demographic Analysis of the Vermont Visitor" report to the Vermont Department of Tourism and Marketing (June 1998.) The demographic information in Appendix A reflects the profile of these segments.
- There were two stages to the project. In the first phase, households were called and screened for their willingness to participate in the project. Permission was obtained from 303 people. At the time of receiving their permission they were asked the pre-test questions on visit intentions and destination attractiveness.
- In the second phase, the 303 participants were sent videos of the Vermont and Maine fall foliage advertising. Upon receipt, participants were instructed to view the videos and then complete the study questionnaire with the “post” questions and the diagnostic follow-ups. Participants were permitted to watch the video as many times as they wished.
- Of the 303 videos with questionnaires that were distributed, 154 came back complete, a 51% response rate.

Executive Summary and Strategic Implications

- Vermont is perceived to be the preeminent Northeast fall foliage destination. Quality perceptions and visit intentions are significantly higher towards Vermont than towards New York, New Hampshire or Maine.
- The advertising increased the intent to visit all of the Northeast states. Intentions to visit Vermont next fall increased from 43.6% in the pre-test to 53.6% in the post-test.
- Although the advertising increased visit intentions, it did not increase perceptions of the quality of the fall foliage viewing experience. In fact, with the exception of Maine, quality perceptions declined slightly. This may indicate that, while the advertising reminded people of the quality of the experience, the image (before they saw the advertisement) of foliage was more compelling than the advertising imagery.
- Although Vermont is perceived to be the superior fall destination, the Maine advertising was rated to be more persuasive. This suggests that Maine advertisement visuals of the Maine Coast intertwined with foliage shots and the variety of activities portrayed in the advertising was advantageous.
- The Vermont advertising did a good job of reinforcing positive perceptions about the state. The phrase, “Fall, It’s Our Season” performed well and fits the general perception that Vermont is the superior fall destination. However, the phrase, “World’s Best Foliage,” and particularly the association with Vermont products was not evaluated favorably.
- The Vermont advertising was successful. The results of this research, however, suggest that future advertising may be more successful if it is able to broaden the “Fall, It’s Our Season” theme by wrapping the foliage experience with other unique Vermont benefits, which could include the general “escape to beauty and serenity” benefit identified in the research conducted by the O’Neal Group and Paul Kaza Associates in Unlocking the Brand of Equity in Vermont.
- Future advertising should portray Vermont as a relaxing escape without creating the perception that it is passé or mature. The challenge is to not only remind potential visitors of the good things they already know, but to also give them a new perspective on an old friend.

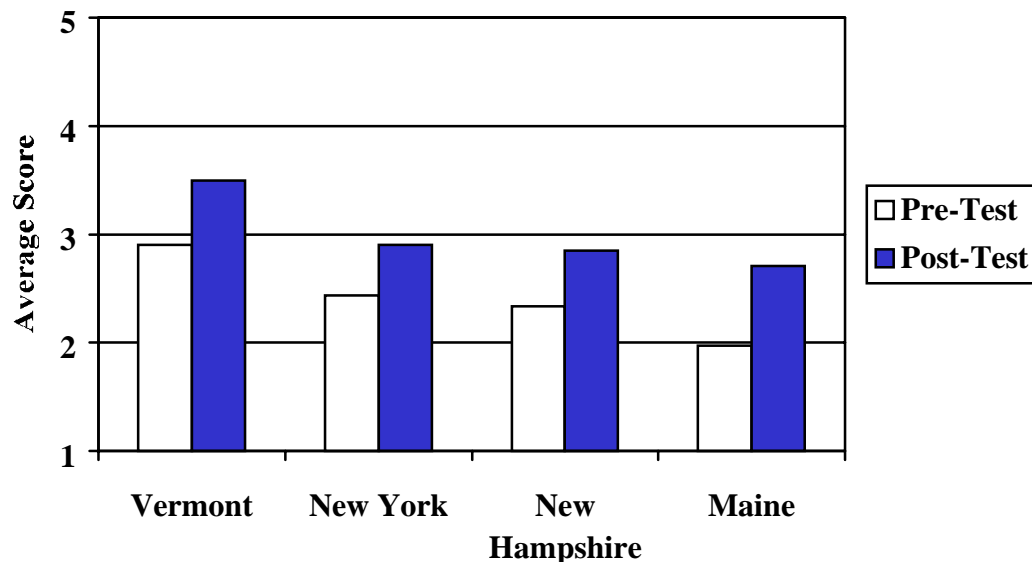
Pre-Post Scores on Intent to Visit and Destination Attractiveness

Q2. Considering factors such as cost, convenience and time, on a five point scale with “5” meaning “definitely will visit” and “1” meaning “definitely will not visit,” what is the likelihood that you will visit ____ next fall?

TABLE 1
Fall Visit Likelihood

What is the likelihood you will visit [insert state] next fall?				
“Visit Likelihood”				
State	Mean (Pre-test)	Mean (Post-test)	“4” or “5” (Pre-test)	“4” or “5” (Post-test)
Vermont	2.90	3.50	43.6%	53.6%
New York	2.44	2.90	31.1%	39.0%
New Hampshire	2.34	2.85	24.2%	33.3%
Maine	1.97	2.71	17.5%	30.0%

* Rating on a five point scale with “5” meaning “definitely will visit” and “1” meaning “definitely will not visit.”



- The advertising positively influenced visit intentions, not only towards Vermont and Maine, but also towards New York and New Hampshire. In other words, the advertising increased primary demand to participate in fall foliage viewing, regardless of the state.
- Vermont, however, is likely to be the primary beneficiary of the advertising because visit intentions, both in the pre-test and post-test, were significantly higher, than in New York, New Hampshire or Maine.
- Maine enjoyed the largest increase in visit intentions, but also had the poorest overall ratings. The Maine advertising was successful in the sense that it increased visit intentions to a par with New York and New Hampshire.

Q3. On a ten point scale with “10” meaning “increased my interest” “5 meaning “had no effect on me one way or the other” and “1” meaning “decreased my interest,” what effect did the advertising have on your interest in [insert destination] next fall?

TABLE 2
Overall Advertising Effectiveness

Advertising influence on “interest in visiting.”				
“Advertising Effectiveness”				
Issue	Mean	Increased Interest	Decreased Interest	Neutral
Visiting Maine	6.47	36.2%	19.1%	44.7%
Visiting Vermont	6.34	31.1%	8.6%	60.3%
Visiting “Somewhere”	6.34	32.6%	7.1%	60.3%

* Prefer Vermont includes ratings of 1-3; prefer Maine includes ratings of 8-10; neutral includes 4-7.

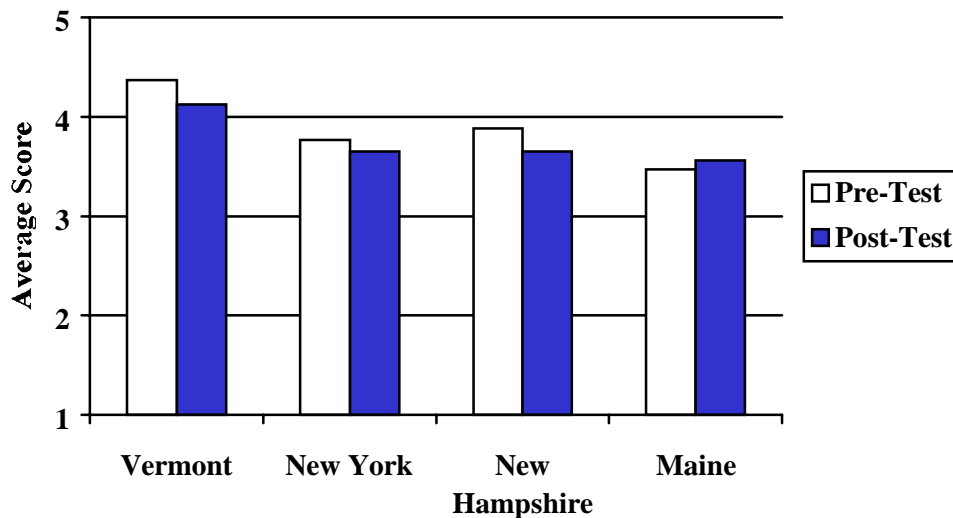
- These results confirm the findings above. The advertising positively, but not dramatically, increased visit intentions towards the sponsored states, and towards fall foliage viewing in general.

Q1. On a five point scale with “5” meaning “superior to others” and “1” meaning “inferior to others,” how would you rate the quality of the fall foliage viewing experience in [insert state]?

TABLE 3
Quality of the Fall Foliage Viewing Experience

How would you rate the quality of the fall foliage viewing experience in [insert state]?				
“Fall Foliage Viewing Experience”				
State	Mean (Pre-test)	Mean (Post-test)	“4” or “5” (Pre-test)	“4” or “5” (Post-test)
Vermont	4.37	4.13	85.1%	76.0%
New Hampshire	3.88	3.65	67.9%	61.3%
New York	3.77	3.65	63.0%	62.6%
Maine	3.47	3.56	45.2%	54.2%

* Rating on a five point scale with “5” meaning “superior to others” and “1” meaning “inferior to others.”



- Vermont is perceived to offer a significantly better fall foliage viewing experience than New Hampshire, New York or Maine.
- Quality ratings declined slightly in the post-test for every state, except Maine. One potential explanation for this pattern of results is that the imagination of the participants in the pre-test was more compelling than the advertising imagery.

Diagnostic Analysis of Vermont and Maine Advertising

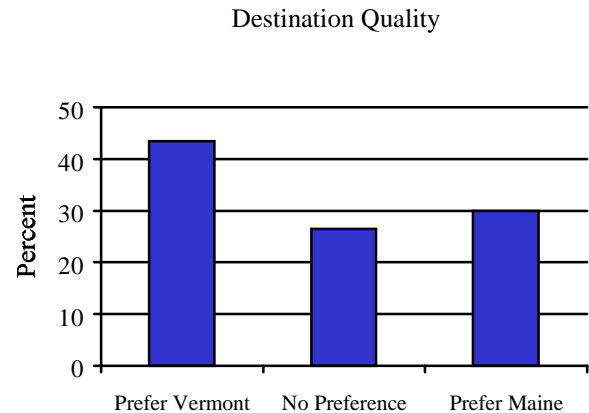
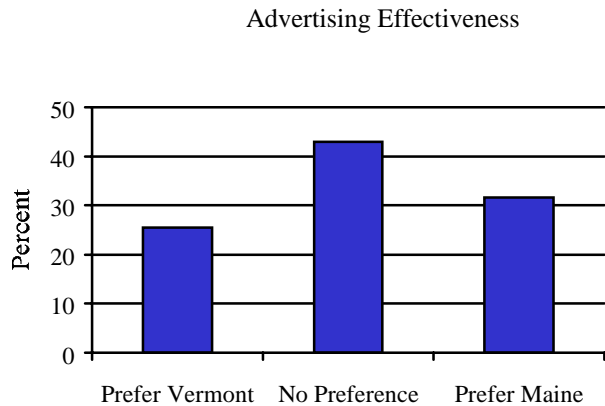
Q4a. On a ten point scale with “10” meaning “the Maine Advertising” “5 meaning “they’re about the same” and “1” meaning “the Vermont Advertising,” which state’s advertising do you believe was most effective in increasing your interest in visiting that state?

Q7. Above and beyond the issue of the advertising you just viewed, on a ten point scale with “10” meaning “definitely Maine” and “1” meaning “definitely Vermont,” which state do you believe is the better overall fall vacation destination?

TABLE 4
Vermont Versus Maine

Relative advertising effectiveness and destination quality				
“The Relative Performance of Vermont and Maine”				
Issue	Mean	Prefer Vermont	Prefer Maine	Neutral
Advertising Effectiveness	6.11	25.4%	43.0%	31.6%
Destination Quality	4.89	43.5%	26.5%	30.0%

- Prefer Vermont includes ratings of 1-3; prefer Maine includes ratings of 8-10; neutral includes 4-7.



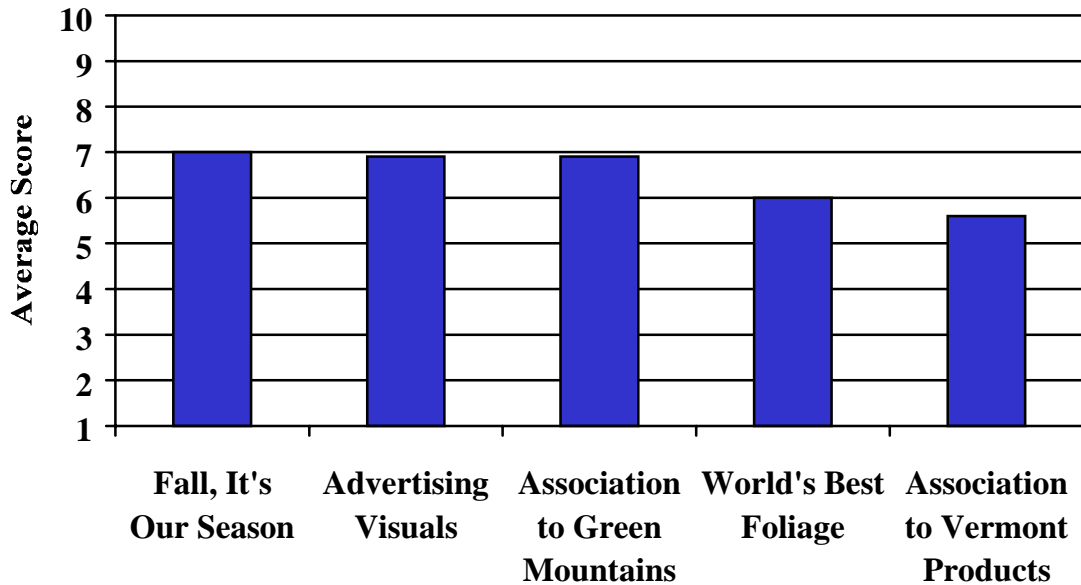
- Maine's advertising was perceived to be superior to Vermont's but the Vermont product continues to be perceived to be superior to Maine's.
- These results suggest that Maine has narrowed what remains to be a large gap between the two states.

Q5. On a ten point scale with “10” meaning “I liked it”, “5” meaning “It didn’t effect me one way or the other,” and “1” meaning “I disliked it,” how would you rate the following elements of the Vermont advertising?

TABLE 5

Vermont Advertising Diagnostic				
“Vermont Advertising Evaluation”				
Issue	Mean	Appealing	Unappealing	Neutral
“Fall, It’s Our Season”	7.0	45.0%	3.3%	51.7%
The advertising visuals	6.9	48.0%	12.7%	30.0%
The association to the Green Mountains	6.9	43.7%	6.0%	50.3%
“World’s Best Foliage”	6.0	33.1%	15.2%	48.3%
The association to Vermont products	5.6	34.7%	30.0%	35.3%

- “Unappealing” includes ratings of 1-3; “Appealing” includes ratings of 8-10; neutral includes 4-7.



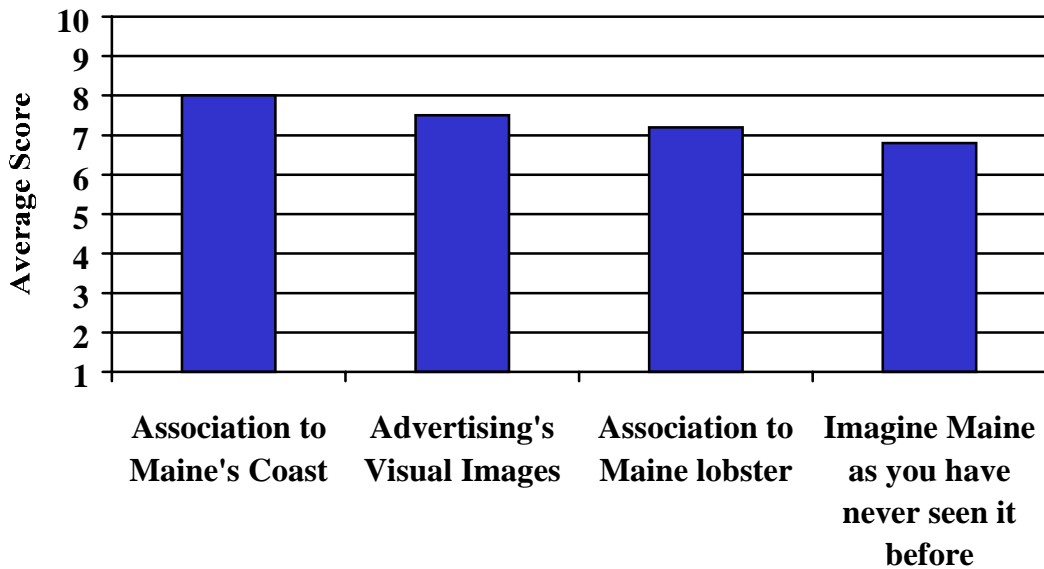
- When participants were asked to rate various elements of the Vermont advertising, scores were mostly positive.
- The phrase “Fall, It’s Our Season,” performed well and is also relevant given Vermont’s position in people’s minds as the preeminent fall foliage destination. In support of this phrase, the visual theme and association to the Green Mountains appealed strongly to a near majority of viewers.
- The phrase, “Worlds Best Foliage,” however, did not perform as well. It appealed strongly to only a third of the viewers. The association to Vermont products also had strong appeal to about a third of the viewers. Disturbingly, it had very weak appeal among almost as many participants.

Q6. On a ten point scale with “10” meaning “I liked it”, “5” meaning “It didn’t effect me one way or the other,” and “1” meaning “I disliked it,” how would you rate the following elements of the Maine advertising?

TABLE 6

Maine Advertising Diagnostic				
“Maine Advertising Evaluation”				
Issue	Mean	Appealing	Unappealing	Neutral
The association to Maine’s coast	8.0	64.9%	4.0%	31.1%
The ad’s visual images	7.5	53.6%	6.0%	40.4%
The association to Maine lobster	7.2	49.0%	8.6%	42.4%
“Imagine Maine as You’ve Never Seen it Before”	6.8	39.7%	4.0%	56.3%

- "Unappealing" includes ratings of 1-3; "Appealing" includes ratings of 8-10; neutral includes 4-7.



- The success of the Maine advertising appears to stem from its ability to leverage the fall foliage theme by wrapping it into other very well-liked and unique aspects of the Maine experience.
- Every element of the advertisement performed well, particularly the visual imagery of the Maine Coast.

TABLE 7
Specific Comments Regarding Vermont and Maine Advertising

Cause of the preference for Maine or Vermont advertising		
	Vermont	Maine
The visual elements and theme of the advertising	8.4%	25.3%
More, better, or more varied activities portrayed	8.4%	17.9%
Prior experience, reminder of superiority	12.6%	2.1%
Proximity to their home	9.5%	1.1%
Commercialism harmed the advertising's appeal	25.3%	0.0%

* Based on the 95 respondents that had a significant preference for one of the state's advertising.

- Subjects' open-ended responses to their relative rating of the Vermont and Maine advertising shed more insight into their effectiveness. See Appendix B for the full set of comments.
- The success of the Maine advertising is related to the energy, variety and appeal of its visual themes as well as to the varied outdoor activities that it portrayed.
- The appeal of the Vermont advertising was curbed by the perceived commercialism created by the product references. Also, the advertising appeared to do a better job of reminding people that they already preferred Vermont rather than by giving people any compelling new perspective on the state.
- There also appeared to be an undertone to the remarks which suggested that Maine is a more energetic, youthful active destination, while Vermont is older, slower and more passive.

TABLE 8
Respondent Age

Respondent Age		
	U.S Average	Survey Sample
65 or older	21.8%	16.6%
55-64	12.6%	18.5%
45-54	18.0%	27.2%
35-44	24.3%	28.5%
25-34	18.8%	7.9%
24 or younger	4.3%	1.3%

{The Table heading "In what year were you born?" is confusing since the table reports age, not year born}

- As it should given the target market for the research, the respondent sample overweighted {Replace "overweighted" with "included more"} middle-aged individuals in their prime earning years.

TABLE 9
Respondent Household Income

Which of the following categories contains your annual household income?		
	U.S Average	Survey Sample
Less than \$25,000	36.9%	4.4%
\$25,000 - \$34,999	14.7%	8.1%
\$35,000 - \$49,999	17.0%	22.0%
\$50,000 - \$74,000	17.2%	30.9%
\$75,000 - \$99,999	7.8%	17.6%
\$100,000 or more	6.4%	17.0%

- There is a large skew in the respondent sample to more affluent households. Two thirds of the sample are from households earning more than \$50,000 annually as compared to 31.4% of U.S. households.

TABLE 10
Respondent Education

Which of the following categories contains the last level of education that you completed?		
	U.S Average	Survey Sample
High school or less	47.2%	8.2%
Some college	24.0%	26.0%
Undergraduate degree	18.4%	23.9%
Graduate Work	10.5%	41.9%

- As with income, the survey respondents skew heavily towards higher educational achievement. Two thirds of respondents completed at least an undergraduate degree; the U.S. average is less than 30%.