



**FERENCE WEICKER & COMPANY**

**BRANDING BC AGRICULTURE  
AND FOOD PRODUCTION**

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**Phase II: Program Design**

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## EXECUTIVE SUMMARY

### PURPOSE OF THE PROJECT

The Investment Agriculture Foundation of British Columbia, the BC Agriculture Council, the BC Food Processors Association and other organizations recently came together to commission an extensive review of the agri-food industry, entitled Focus on the Future. The purpose of the project was to assess key issues that are strategically important to the overall long-term success of the BC agri-food industry and develop specific strategies that industry, government and the Investment Agriculture Foundation of BC could pursue to assist industry to expand, diversify and enhance its competitive position, and build a stronger industry future. The resulting report recommended establishing a branding program for BC agri-food products. However, the report also noted that there are a variety of different programs and initiatives planned or underway which relate, directly or indirectly, to the marketing of BC food products. It was recommended that any such program be developed collaboratively and in close coordination with these other programs and initiatives.

The purpose of this project was to facilitate a more coordinated focus across branding initiatives, to enhance effectiveness of branding and to increase the sales of BC agri-food products and services. To facilitate development of a plan, this project brought together a Steering Committee which included representatives of over 20 different organizations and initiatives involved in marketing BC agri-food products. During the course of the project, several meetings were held with members of the committee including a workshop which focused on the design of a program outline. In addition, extensive research was conducted into branding programs that currently operate in the province, the structure and activities of similar branding initiatives in other jurisdictions, and the impact of branding initiatives. Based on the results, this report outlines the recommended design for a branding program.

### SUPPORT FOR THE PROVINCIAL BRANDING PROGRAM

Members of the Steering Committee, which includes representatives from the Provincial Government, the Federal Government, Investment Agriculture Foundation of BC, industry, and other branding programs, as well as other industry representatives whom we interviewed, expressed strong support for establishing a significant province-wide branding program for BC agri-food products. The results of our research indicate that:

- **Taking steps to improve the marketing of BC food products should be a high priority for both government and the industry.** The agri-food industry is highly valued by British Columbians because of its impact on our economy, our food-security, and our physical environment. Focus on the Future determined that marketing is the most significant issue affecting the financial performance and health of the industry.
- **A coordinated branding program will strengthen consumer preference for locally-produced food products,** building on the propensity of consumers to believe that local products are fresher (due to faster grower to market times), safer, healthier, and of higher quality. When given the option, most consumers want to support local farmers and businesses.
- **A successful branding program will improve the economic viability of the agri-food industry in British Columbia contributing to industry growth and development.** More specifically, a successful branding program will improve margins by strengthening prices for certain products and reducing distribution costs, expand the markets for BC produced goods, increase access of BC

producers to key distribution channels, generate significant environmental benefits by reducing the number of food miles, facilitate cooperation and coordination in marketing and development activities, improve the marketing skills and provide a rallying point for the industry, and improve the image of the agri-food industry in British Columbia among potential managers, workers, investors and operators as well as consumers. In addition, the program would generate significant economic impacts. For example, a 1996 evaluation of the Buy BC branding program estimated that the program had generated 1,900 jobs in the agri-food sector over a three year period.

- **Most other jurisdictions in Canada and the United States have active branding programs that encourage local consumers to purchase food products that are produced in the province or state.** The absence of a strong program places BC producers and processors at a competitive disadvantage.
- **A strong provincial branding program will complement and improve the effectiveness of the various branding and promotional initiatives already operating in BC.** A provincial branding program will complement existing programs by helping to identify BC products, particularly those products which are not participating in other initiatives; encouraging BC consumers to place a priority on the purchase of BC produced products, encouraging BC retailers, food service and institutional buyers to carry and feature BC produced products; and providing opportunities for cooperative marketing and co-branding activities.

## PROGRAM DESIGN

The main body of the report outlines a proposed design for a branding program, with linkages to AAFC export programs, in terms of the vision, goals, performance measures, actions and implementation. A summary of the recommended vision, goals and actions is provided in the table on the following page. As indicated, the actions have been grouped under four key goals related to product identification, consumer promotion, distribution, and coordination. Key components of a provincial branding program should include:

- **Licensing of the brand and logo** to BC producers and processors who meet the eligibility criteria and sign a licensing agreement.
- **A consumer marketing program** which would include a strong website targeted at consumers, producers and processors, retailers and the food service industry; media advertising (billboards, TV, radio, print); and establishment of a designated month for promoting BC products. Much of the media advertising program would be implemented during the designated month.
- **A merchandising program targeted at retailers and the food service industry.** The merchandising program would involve developing and distributing point-of-purchase materials and other collateral; developing promotions with retail and restaurant chains; and having merchandisers go into retail and food service operations to provide support in setting up and using the materials. As currently envisioned, the merchandising program should be a twice annual promotion (with one of the promotions corresponding to the month designated for promoting BC products).
- **An industry marketing program** which would provide funding to industry groups on a cost-shared basis (e.g. matching funding) for industry led marketing initiatives that are consistent with the objectives and strategies of the branding program.

**PRELIMINARY DESIGN OF A COORDINATED BRANDING PROGRAM FOR BRITISH COLUMBIAN AGRI-FOOD PRODUCTS AND SERVICES**

<p><b>Vision</b></p>	<p>British Columbians and visitors demonstrate a strong preference for purchasing agri-food products produced in British Columbia, recognizing the quality, freshness, safety, environmental and economic benefits of buying local</p>			
<p><b>Goals</b></p>	<p><b>PRODUCT IDENTIFICATION</b></p> <p>To ensure that products are clearly identified as British Columbia produced</p>	<p><b>CONSUMER PROMOTION</b></p> <p>To ensure that the purchase criteria employed by consumers place a high priority on BC products</p>	<p><b>DISTRIBUTION</b></p> <p>To ensure that retailers, food service operations and institutional buyers feature BC products</p>	<p><b>COORDINATION</b></p> <p>To ensure that a provincial branding program complements and is coordinated with other marketing initiatives ongoing in BC</p>
<p><b>Recommended Actions</b></p>	<ul style="list-style-type: none"> <li>• Develop a formal branding strategy and logo</li> <li>• Establish formal criteria defining what constitutes a BC product</li> <li>• Recruit processors and producers to participate in the program</li> <li>• Establish a simple monitoring system for reporting and following up on unauthorized use of logos, inappropriate use of materials, and breaches of the licensing agreement</li> </ul>	<ul style="list-style-type: none"> <li>• Undertake consumer research to assist in the development of the branding strategy and provide benchmark data against which to track the impact of the program</li> <li>• Develop and implement a consumer marketing program incorporating media advertising, earned media coverage, a website, and a designated month for promoting BC products.</li> </ul>	<ul style="list-style-type: none"> <li>• Establish an on-going Advisory Committee involving representatives of retailers and the food service industry</li> <li>• With input from the committee, design and develop a merchandising program for retailers and the food service industry</li> <li>• Implement the merchandising program to work with retailers and the food service industry to increase the onsite profile of BC products</li> </ul>	<ul style="list-style-type: none"> <li>• Maintain the Steering Committee</li> <li>• Develop an application driven program which will provide financial assistance for industry sponsored and support marketing initiatives designed to promote BC products to British Columbians</li> <li>• Implement the program</li> <li>• Conduct consumer tracking studies to assess the progress made by the branding program on an on-going basis</li> </ul>

- **Consumer tracking and evaluation** studies to assess the progress made by the branding program on an on-going basis. A formal evaluation of the program should be undertaken every three to five years. An evaluation framework should be developed once the formal branding strategy is in place.

## NEXT STEPS

The next steps that should be taken include:

- **Review the proposed structure of a provincial branding program as outlined in this report and provide feedback to the consultant.**
- **Engage a professional branding consultant to develop a formal branding strategy.** The consultant will provide recommendations for an advertising and merchandising program. The Steering Committee believes that a new branding program featuring a new name and tagline would be in a better position to generate excitement and garner support from both industry and government.
- **Conduct the initial consumer market research.** A survey of 1,000 BC consumers should be undertaken to assist in the development of a branding strategy and provide benchmark data against which to track the impact of the program.
- **Secure funding for implementation of a provincial branding program.** The key sources for potential funding are the Province of British Columbia and the Investment Agriculture Foundation of BC. A detailed budget will need to be developed for the program. The budget for the previous provincial branding program averaged nearly \$2.0 million in the mid-1990s, of which 35% was used for communications, 40% for industry partnership programs, and 25% for implementation and evaluation.
- **Establish an advisory committee consisting of representatives of retailers and the food service industry.** The advisory committee will assist in designing the merchandising program and provide on-going assistance in guiding program implementation.
- **Establish the delivery structure.** It is recommended that the BC Agriculture Council and the BC Food Processors Association, in concert with food service and retail sectors, play a significant role in the branding program implementation to ensure that both the producer and processors segments are directly involved.
- **Develop the website for the brand.** The website will be targeted at consumers, producers and processors, retailers and the food service industry.
- **Create awareness of the branding program in the industry and recruit potential members.** The recruitment program will involve mail-outs to potential participants, direct contact with key targets, working directly with industry associations, presentations at trade shows, and generating earned media.
- **Implement the program.** The key elements would include establishment of a designated month for promoting BC products, an advertising program, a merchandising program, and a fund that will provide funding to industry groups on a cost-shared basis.

- **Track the results.** Consumer tracking studies will assess the progress made by the branding program on an on-going basis. The Steering Committee will meet annually or semi-annually to review the results, recommend improvements to the program, coordinate activities, and facilitate communication.



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## I. INTRODUCTION

### A. BACKGROUND

The Investment Agriculture Foundation of British Columbia, the BC Agriculture Council, the BC Food Processors Association and other organizations recently came together to commission an extensive review of the agri-food industry, entitled *Focus on the Future*. The purpose of the project was to assess key issues that are strategically important to the overall long-term success of the BC agri-food industry and develop specific strategies that industry, government and the Investment Agriculture Foundation of BC could pursue to assist industry to expand, diversify and enhance its competitive position, and build a stronger industry future.

As part of the review process, a series of seven workshops were held throughout the province in Nanaimo, Surrey, Abbotsford, Prince George, Dawson Creek, Vernon and Creston. Approximately 300 people participated in the workshops. The most common industry recommendation coming out of these sessions was to strengthen provincial branding programs for food products. One existing program, known as Buy BC, has operated with a very small budget in recent years. Very little marketing support has been available for branding BC products and, consequently, the number of organizations participating in the program has declined sharply.

Reflecting the input provided by the workshop participants as well as the results of other analysis undertaken during the review, *Focus on the Future* recommended establishment of a strong branding program for BC. However, the report also noted that there are a variety of different programs and initiatives planned or underway which relate, directly or indirectly, to the marketing of BC food products. It was recommended that this project:

- Identify opportunities for coordination among branding programs and for reinforcing messaging to increase effectiveness of branding BC products and services;
- Establish ongoing linkages and communications for supporting branding of BC products and services; and
- Be developed collaboratively and in close coordination with these other programs and initiatives.

### B. PURPOSE OF THE PROJECT

The purpose of this project was to develop a coordinated plan for a branding program for BC agri-food products and services. To facilitate the development of a coordinated plan, this project brought together a Steering Committee of representatives of various organizations and initiatives including:

- BC Agriculture Council;
- BC Cattlemen's Association;
- BC Fruit Growers Association;
- BC Dairy Foundation;
- Partners in Healthy Eating;
- BC Food Processors Association;
- Island Farmers' Alliance;
- Branding the Peace Country Association;
- BC Restaurant and Food Services Association;

- The Overwaitea Group;
- BC Wine Institute;
- Association of BC Wine Growers
- BC Culinary Tourism Society
- BC Seafood Alliance;
- Tourism BC;
- BC Ministry of Agriculture and Lands;
- Agriculture and Agri-food Canada; and
- Investment Agriculture Foundation of BC.

## **C. SUMMARY OF WORK COMPLETED**

The major steps that we undertook in preparing this report included:

- An initial meeting with members of the Steering Committee established for the project.
- An extensive literature review regarding the scope of existing and proposed initiatives in British Columbia. We also conducted interviews with representatives of over 20 branding programs that operate in the province. The purpose of these interviews was to obtain a description of their activities as well as input regarding the coordination of branding programs. A summary of these programs is provided in Appendix I.
- Reviewing the structure and activities of similar branding initiatives in other jurisdictions. We conducted a literature review of information on other programs and completed interviews with representatives of branding programs in other jurisdictions including Nova Scotia, Ontario, Alberta, Saskatchewan, Washington State, Idaho, California, Oklahoma, Wisconsin, Nebraska, Pennsylvania, Mississippi, North Dakota, Michigan, Alabama, New Mexico, and Kentucky. The purpose of these interviews was to obtain input regarding the structure and characteristics of the programs in those jurisdictions. A summary of programs in other jurisdictions is provided in Appendix II.
- A review of available information on the impact of past branding initiatives in BC and other jurisdictions on consumer purchase decisions and the implications for future branding programs.
- Interviews with 22 members of the Steering Committee to obtain input regarding the potential structure of a provincial branding program.
- Interviews with 22 representatives of organizations which are currently members of the Buy BC program. The purpose of these interviews was to obtain input regarding their objectives for participating in programs, their level of satisfaction with Buy BC, their interest in participating in a future program, and recommendations regarding the structure of such programs.
- Interviews with 28 representatives of organizations who are former members of Buy BC. The purpose of these interviews was to obtain input regarding their interest in participating in future programs and recommendations regarding the structure of such programs.
- Preparation of a draft discussion paper, which summarized the research results to that point and highlighted the implications on the potential vision, objectives and approaches for coordinating branding of agri-food products and services in BC.

- Staging of a workshop involving representatives of the Steering Committee to develop a preliminary design for the program.
- Preparation of this report, which summarizes the major findings of our review, presents a design for a program, and outlines the next steps.

#### **D. STRUCTURE OF THE REPORT**

This report is structured as follows:

- Chapter II provides an overview of the major findings of our review, discusses the level of industry support for a provincial branding program, and presents recommendations regarding the structure of such a program.
- Chapter III identifies the key success factors for a branding program and outlines the recommended next steps towards development of a provincial branding program.
- Appendix I provides an overview of existing and proposed branding initiatives related to BC agri-food products.
- Appendix II summarizes the results of our research regarding programs and initiatives that have been implemented in other jurisdictions to increase demand for local agri-food products and services, the impact of branding on the demand for agri-food products, and best practices for branding programs.

## II. DESIGN OF THE BRANDING PROGRAM

This chapter summarizes the major findings of our review, discusses the level of industry support for a provincial branding program, and provides recommendations regarding the design of a program.

### A. SITUATIONAL ANALYSIS

The major findings of our review are summarized as follows:

**1. Taking steps to improve the marketing of BC food products should be a high priority for both the industry and government.**

The agri-food industry is highly valued by British Columbians because of its impact on our economy, our food-security, and our physical environment. While we remain a net food importer, the industry serves as a very important source of food products and employment for British Columbians. As concerns about food safety increase so to does the importance we place on having a strong domestic industry that provides a measure of food security. We highly value agriculture land because it benefits the environment and protects significant areas of our green space from further urban development.

In the recent Focus on the Future project, marketing was most commonly identified by sector associations and commodity groups as a key constraint to future development of the agri-food industry in BC. Factors such as lack of a strong brand image, the absence of a broad, province wide marketing program to identify local products and encourage people to buy locally, limited knowledge regarding markets, a lack of marketing skills, and limited appreciation of the importance of marketing have constrained attempts to differentiate BC products from those of our competition even among provincial consumers.

**2. There is a clearly demonstrated consumer preference for locally-produced food products.**

Past research clearly indicates that, when given an option, local consumers prefer to purchase local products. For example, a 2001 Evaluation of the “Grown in Georgia” promotion program found that 94% of shoppers would purchase the local product if it was of similar price and quality. Similarly, a 2006 poll for the “Pride of Dakota” program, conducted by the Bureau of Governmental Affairs at the University of North Dakota with consumers in the state of North Dakota, found that 79% of people would be more likely to purchase a product if they knew it was produced locally.

The consumer preference for purchasing local products reflects the belief that:

- Local products are fresher (due to faster grower to market times);
- Local products are safer and more healthy;
- Local products are of higher quality; and
- Buying local helps to support local farmers and businesses.

The most significant change in these attributes in recent years has been the increased importance placed by consumers on food safety. Recent health scares associated with BSE, spinach, bird flu

and terrorism have raised the profile of food safety and local food security. An extensive 2005 survey by Ipsos Reid, "What Do Customers Really Want", confirmed that:

- Quality means freshness, nutritious and safety;
- Health and safety have become major themes for Canadian consumers;
- The media is the primary source of information for food safety for Canadian consumers;
- 92% of consumers believe that food produced in Canada is of higher quality than imported food.

**3. Most other jurisdictions in Canada and the United States have active branding programs that encourage local consumers to purchase agriculture and food products that are produced in the province or state.**

In Appendix II, we provide an overview of branding programs in Saskatchewan, Alberta, Ontario and Nova Scotia as well as in various US states. As of 2001, 43 of the 50 US states delivered state-wide branding programs. Some of the characteristics which are common to many of these programs include:

- The primary function of most provincial and statewide branding programs is: (1) to identify local products; and (2) to build and reinforce consumer preference for local products.
- Most branding programs focus strictly on the domestic market. The brand usually incorporates the name of the jurisdiction's name in the tagline to emphasize the local nature of the identified products ("Saskatchewan Made", "A Taste of Nova Scotia", "Alaska Grown, Fresher By Far", "Be Californian Buy California Grown", "Fresh from Florida", "Kentucky Fresh, Kentucky Proud", "Pride of Dakota", "From the Heart of Washington", "New Jersey Fresh", "Make Mine Mississippi", "Colorado Proud", and "Maryland's Best"). Those programs that target on out-of-state or export markets tend to focus on specific products (e.g. New Zealand Lamb or Iowa Pork) which are commonly associated with the region by consumers.
- The programs use a variety of media, relationships, and marketing materials to promote the brand including in-store promotions, media advertising, web sites, road signs, and special promotions such as magazines, cooking shows, special events, product catalogues, and "made in \_\_\_ month". Local politicians (e.g. the Premier or Governor) or high profile residents are often featured in the commercials or other advertising.
- Some programs also assist their brand users with technical issues such as labeling and packaging. Others give direct market assistance with training and joint marketing efforts. Some publish "how to" manuals and provide training, seminars and instructional websites. Examples of other support activities include consumer research, industry awards, standard setting, and farm tours.
- Most programs rely primarily on government for financial support. The budgets of the provincial and state programs vary widely across the jurisdictions, from a few thousand dollars to many millions. Most receive at least some public funding and many are totally

dependent on government funds. While some charge for the use of their logo, most programs provide services at no charge.

- Programs use a variety of formal and informal methods to attract brand users including trade shows, media, face to face/word of mouth, industry association membership lists, websites, and employing dedicated recruitment specialists.
- Most provincial and state branding programs do not have the resources to actively monitor and police the use of logos and other materials. Most programs are essentially self-policing, using consumer feedback, competitors' reports, and retailer reports. Most also require users to sign a licensing agreement that essentially relies on the integrity of the user to adhere to the conditions of the usage agreement. Some programs use merchandisers to assist retailers set up promotional materials in the store and to ensure that materials are used appropriately.
- Many branding initiatives, especially US state programs, are administered directly by a government department of agriculture. Other programs are run by non-profit agencies or industry associations with funding assistance from the public sector.

4. **A successful branding program can strengthen the economic viability of the agri-food industry in British Columbia and contribute to the achievement of government priorities.**

A successful branding program will:

- **Improve margins by strengthening prices for certain products.** Many consumers are willing to pay at least some premium for quality products produced locally. For example, 75% of New Jersey consumers surveyed indicated that they were willing to pay a premium to purchase Jersey Fresh produce. A 2006 poll for the "Pride of Dakota" program, conducted by the Bureau of Governmental Affairs at the University of North Dakota with consumers in the state of North Dakota, found that 52% of people are willing to pay a premium from 1 to 10% for local food, 14% are willing to pay a premium from 11% to 20%, and 4% would pay more than 20%. Only 28% of consumers indicated that they would not pay a premium.
- **Improve margins by reducing distribution costs** through displacing exports and enabling a higher percentage of production to be sold locally. Generally speaking, the shorter the length of the distribution channel, the greater the proportion of the final selling price returned to the producer or processor.
- **Expand the markets for BC produced goods**, which will facilitate increases in production for certain products. A provincial branding program will not only increase sales at the retail level but also in the food service and institutional markets. As an illustration, pilot projects in Iowa demonstrated that chefs and food service managers prefer to purchase local food items over lower-priced imported food based on quality, taste, and a desire to support the local community. A Northeast Iowa campaign was successful in doubling local food purchases among twenty-three institutional buyers, including hospitals, retirement homes, colleges, and others.
- **Increase access of BC producers to key distribution channels.** Changes in the value-chain are making it more difficult for producers and processors to gain market access,

even to local markets. The distribution and marketing systems are seeing significant consolidation, leading to more centralized, high volume buying operations that seek to make greater use of high technology and exercise market power to reduce costs. Small operators have found it increasingly difficult to compete on price or produce sufficient volumes to be considered by the volume-based systems. Branding programs can increase access to these distribution channels by encouraging consumers in BC to demand that their retailers and food service providers carry more products produced in the province and encourage them to support local retailers that carry and promote BC products. The effectiveness of pull strategies has been demonstrated in past research; for example, in New Jersey, 79% of Jersey consumers indicated that they would consider changing their usual supermarket in order to be able to purchase Jersey Fresh produce. Similarly, in Georgia, a significant number of shoppers indicated that they would switch stores to purchase local produce.

- **Generate significant environmental benefits by reducing the number of food miles.** Food miles are the measure of the distance a food travels from field to plate. According to some studies, agri-food products account for nearly 30 percent of goods transported on our roads and, as such, add substantially to the carbon dioxide emissions that are contributing to climate change. A buy local program can have a significant impact in reducing the number of food miles.
  - **Facilitate cooperation, coordination and improvements in marketing and development activities.** A strong branding program will work in conjunction with the marketing activities of retailers, processors and producer associations. An evaluation of the Buy BC program, conducted in 1996, found that the program not only complemented existing programs but enabled various industry associations and groups to improve their marketing skills.
  - **Provide a rallying point for the industry.** The benefits generated by a strong industry brand can encourage producers and processors to take action so that they can consistently live up to the brand promise. For example, a strong branding program focused on quality, freshness and safety will provide an incentive to the BC agri-food industry to further develop and adopt safety, quality management, traceability and environmental systems that will enable the industry to meet expectations in the domestic markets as well as access global markets that recognize high-quality standards.
  - **Improve the image of the agri-food industry in British Columbia.** A strong branding program can help to improve the image of the industry among potential managers, workers, investors and operators as well as local consumers. The program can encourage the industry to be seen as an attractive area in which to work, develop a career, and operate a business as well as an important part of the local and provincial economy.
  - **Generate direct economic impacts including employment.** A 1996 evaluation of the Buy BC program estimated that the program had generated 1,900 jobs in the agri-food sector over a three year period.
5. **A strong provincial branding program will complement and improve the effectiveness of the various branding and promotional initiatives already operating in BC.**

Appendix I provides an overview of existing and proposed initiatives which may impact the brand

positioning of BC agri-food products and services in local, regional and export markets. These initiatives include government led initiatives (including ActNow, the 2010 Initiative, and the Federal Government's National Branding Initiative), non-government/agency led initiatives (such as the Agritourism Alliance, Go Wild/BC Salmon, Tourism BC, BC Cuisine, the 5 to 10 a Day Program, Health Check, and the BC Certified Organic Program), regional initiatives (including initiatives from the Peace River region, Vancouver Island, and the Fraser Valley), major product branding initiatives (such as BC Hot House, the BC Dairy Foundation's milk promotion initiative, and the Wines of BC program), retailer initiatives, and the existing Buy BC program. Characteristics which are common to many of the programs include:

- **Identification of food as locally grown or processed.** Consumers are increasingly interested in where their food originates and in supporting local products. Consequently, the branding programs focus much of their efforts to identifying the products that can be considered "local". Using logos, catalogues and websites, the initiatives work to allow the consumer to determine which of the many food products are from local sources.
- **Claims of superior qualities.** Many initiatives stress that produce which does not have to travel as far will arrive at the store in a fresher state than imported produce. Some indicate claims for superior quality and link the concept of local with that of high quality. Some do have quality assurance systems (e.g. VQA) but others make this claim without such systems in place. Others make use of superior nutrition or health features to set their product apart from others.
- **Involvement of the public sector.** Most initiatives have (or have had) significant government involvement either through direct funding or administration by a government supported agency. There are some that are self-sustaining. These tend to be small in scope or have the advantage of an obligatory industry levy. Self sustaining programs are either supported by mandatory levies (e.g. BC Dairy Foundation) or offer a formal certification such as organic or a nutritional standard such as offered by the "Health Check" program.
- **Promotional activities.** Each branding initiative engages in efforts to give their brand a higher profile within the marketplace. Promotional activities usually include at a minimum, media campaigns, logo and tagline signage, a website, special events, and product catalogues.

A provincial branding program will complement these existing programs by:

- **Helping to identify BC products**, particularly those products which are not participating in other initiatives;
- **Encouraging BC consumers to place a priority on the purchase of BC produced products.** Increase demand for BC products will benefit all products, including those which are participating in other initiatives;
- **Encouraging BC retailers, food service and institutional buyers to carry and feature BC produced products;** and
- **Providing opportunities for cooperative marketing and co-branding activities.**

The relative importance of these different functions varies from group to group. The structure of the branding program will need to be multi-faceted and flexible in focus and structure so that it can work with a wide variety of different sectors, organizations, and promotional programs, recognizing that different elements of the agri-food industry have different product attributes, supply management programs, marketing channels, consumer profiles, and seasonal considerations.

**B. INDUSTRY SUPPORT FOR THE PROGRAM**

There is strong industry support for establishing a strong branding program for BC agri-food products as highlighted below:

- **Industry Members of the Steering Committee, which includes representatives from the BC Agriculture Council, the BC Food Processors Association and other branding programs, expressed strong support for establishing a significant province-wide branding program for BC agri-food products.**

During the workshop session and interview process, industry members of the Steering Committee were unanimous in their support for the creation of a provincial brand to identify and promote BC agri-food products. Most stakeholders see the initiative as being highly desirable and very timely. The fact that 20 stakeholders are willing to actively participate on the project steering committee is an indication of widespread and strong support for the exercise. Most saw a BC brand as complementary to other branding exercises through acting as an umbrella symbol, helping to identify BC products, encouraging BC consumers to place a priority on the purchase of BC produced products, encouraging BC retailers, food service and institutional buyers to carry and feature BC produced products, and providing opportunities for cooperative marketing and co-branding activities.

- **Most current and past participants in Buy BC expressed interest in participating in a revitalized branding program.**

We conducted interviews with 22 representatives of organizations which are currently members of the Buy BC program and 28 representatives of organizations who are former members of Buy BC. The purpose of these interviews was to obtain input regarding their interest in participating in future programs and recommendations regarding the structure of such programs. On average, the participants indicated that there was a 71% likelihood that they would actively participate in a new branding program.

**INTEREST IN PARTICIPATING IN A BRANDING PROGRAM**

*Questions: If a branding program for BC food products was revitalized, how likely is it that you would participate?*

Likelihood of Participating	Respondents	Percent
Don't Know	3	6%
0%	5	10%
10%	1	2%
25%	3	6%
50%	8	16%

Likelihood of Participating	Respondents	Percent
75%	6	12%
85%	2	4%
90%	1	2%
100%	21	42%
Total	50	100%

The decision to participate or not would depend on various factors including the cost, program design, and level of government involvement. Government involvement was seen as critical due to the need for financial support to lever industry funding.

### C. PROGRAM DESIGN

Based on the results of our research as well as the workshop staged with the Steering Committee, we have prepared a design for a provincial branding program. Recommendations are outlined in the table on the following pages and highlighted in the following paragraphs with respect to the:

- Vision;
- Goals
- Objectives and performance measures
- Recommended actions
- Branding strategy (e.g. name, brand promise, messaging and positioning); and
- Implementation (sources of funding and delivery organization).

#### 1. Vision

The draft vision statement is as follows:

**“British Columbians and visitors demonstrate a strong preference for purchasing agri-food products produced in British Columbia, recognizing the quality, freshness, environmental, and economic benefits of buying local”**

The key themes underpinning the proposed vision statement include:

- The focus is on *British Columbians*
- British Columbians will *demonstrate a strong preference* for local products in their buying behaviour and purchase patterns
- The source of the preference will be *quality, freshness, environmental and economic benefits*

#### 2. Goals

Reflecting the discussion inherent in the workshop, we have grouped program objectives under four key goals or pillars related to product identification, consumer promotion, distribution, and coordination. The goals of a provincial branding program have been defined to be:

- To ensure that our products are clearly identified as British Columbia produced.

**PRELIMINARY DESIGN OF A COORDINATED BRANDING PROGRAM FOR BRITISH COLUMBIAN AGRI-FOOD PRODUCTS AND SERVICES**

<p><b>Vision</b></p>	<p>British Columbians demonstrate a strong preference for purchasing agri-food products produced in British Columbia, recognizing the quality, freshness, safety, environmental and economic benefits of buying local</p>			
<p><b>Goals</b></p>	<p><b>PRODUCT IDENTIFICATION</b></p> <p>To ensure that products are clearly identified as British Columbia produced</p>	<p><b>CONSUMER PROMOTION</b></p> <p>To ensure that the purchase criteria employed by consumers place a high priority on BC products</p>	<p><b>DISTRIBUTION</b></p> <p>To ensure that retailers, food service operations and institutional buyers feature BC products</p>	<p><b>COORDINATION</b></p> <p>To ensure that a provincial branding program complements and is coordinated with other marketing initiatives ongoing in BC</p>
<p><b>Key Performance Measures</b></p>	<ul style="list-style-type: none"> <li>• Number of organizations using the logo and brand</li> <li>• Percent of BC produced products that are using the BC brand</li> <li>• Percent of BC products that are using complementary logos and branding to indicate they are BC produced</li> </ul>	<ul style="list-style-type: none"> <li>• Percent of BC consumers that:                             <ul style="list-style-type: none"> <li>○ Are aware of the brand and promotional campaign</li> <li>○ Are aware of the origin of the agri-food products they purchase</li> <li>○ Employ "BC produced" as a key purchase criterion</li> <li>○ Use availability of BC products as a key criteria is deciding where they purchase</li> <li>○ Are willing to pay a premium for BC products</li> </ul> </li> <li>• Market share of BC products in BC</li> </ul>	<ul style="list-style-type: none"> <li>• Participation of retailers, food service operations and institutional buyers in specific branding initiatives</li> <li>• Number of retailers and food service companies featuring BC products in promotions as well as in store and restaurants</li> <li>• Shelf space and menu items identified as BC produced</li> </ul>	<ul style="list-style-type: none"> <li>• Participation of producer, processor, and other sector associations in specific branding initiatives and programs</li> <li>• Amount of funding leveraged from other sources for every dollar invested in the provincial program</li> </ul>

**PRELIMINARY DESIGN OF A COORDINATED BRANDING PROGRAM FOR  
BRITISH COLUMBIAN AGRI-FOOD PRODUCTS AND SERVICES  
(continued)**

<b>Goals</b>	<b>PRODUCT IDENTIFICATION</b>	<b>CONSUMER PROMOTION</b>	<b>DISTRIBUTION</b>	<b>COORDINATION</b>
<b>Recommended Actions</b>	<ul style="list-style-type: none"> <li>• Develop a formal branding strategy and logo</li> <li>• Establish formal criteria defining what constitutes a BC product</li> <li>• Recruit processors and producers to participate in the program</li> <li>• Establish a simple monitoring system for reporting and following up on unauthorized use of logos, inappropriate use of materials, and breaches of the licensing agreement</li> </ul>	<ul style="list-style-type: none"> <li>• Undertake consumer research to assist in the development of the branding strategy and provide benchmark data against which to track the impact of the program</li> <li>• Develop and implement a consumer marketing program incorporating media advertising, earned media coverage, a website, and a designated month for promoting BC products.</li> </ul>	<ul style="list-style-type: none"> <li>• Establish an on-going Advisory Committee involving representatives of retailers and the food service industry</li> <li>• With input from the committee, design and develop a merchandising program for retailers and the food service industry</li> <li>• Implement the merchandising program to work with retailers and the food service industry to increase the onsite profile of BC products</li> </ul>	<ul style="list-style-type: none"> <li>• Maintain the Steering Committee</li> <li>• Develop an application driven program which will provide financial assistance for industry sponsored and supported marketing initiatives designed to promote BC products to British Columbians and visitors</li> <li>• Implement the program</li> <li>• Conduct consumer tracking studies to assess the progress made by the branding program on an on-going basis</li> </ul>

- To ensure that the purchase criteria employed by our consumers place a high priority on BC products.
- To ensure that our retailers, food service operations and institutional buyers feature BC products.
- To ensure that the provincial branding program complements and is coordinated with other marketing initiatives ongoing in BC.

### **3. Objectives and Performance Measures**

The objectives for the branding program should be quantified, measurable, and time-bound. Market research is required to establish beginning benchmarks as well as provide a basis for developing a formal set of objectives. Key performance measures for which objectives may be developed include:

- The number of organizations using the logo and brand
- Percent of BC produced products that are using the BC brand
- Percent of BC product products that are using complementary logos and branding to indicate they are BC produced
- Percent of BC consumers that are aware of the brand and promotional campaign, are aware of the origin of the agri-food products they purchase, employ “BC produced” as a key purchase criterion, use availability of BC products as a key criteria is deciding where they purchase, and are willing to pay a premium for BC products
- Market share of BC products in the BC market
- Participation of retailers, food service operations and institutional buyers in specific branding initiatives
- Number of retailers and food service companies featuring BC products in promotions as well as in store and restaurants
- Shelf space and menu items identified as BC produced
- Participation of producer, processor, and other sector associations in specific branding initiatives and programs
- Amount of funding leveraged from other sources for every dollar invested by the provincial program

### **4. Recommended Actions**

The recommended actions for consideration under each of the goals are outlined below.

**Goal #1: Ensure that products are clearly identified as British Columbia produced.**

The major actions that are recommended include:

- **Develop a formal branding strategy and logo.**

The Steering Committee recommends that a branding specialist be engaged to develop a formal branding strategy and logo.

- **Establish formal criteria defining what constitutes a BC product.**

Different categories may be established depending upon the level of BC content in the final product. It is recommended that fresh products must be grown in BC to be included while a specified portion of the ingredients and materials in processed products need to have been produced in BC to qualify. It was recommended that the program not establish minimum standards based on health aspects or quality.

The current and past participants in Buy BC were less certain regarding whether use of the brand should be restricted to certain types of products in terms of BC content, healthiness, quality or other characteristics.

**ELIGIBILITY CRITERIA**

*Question: Should use of the brand be restricted to certain types of products in terms of BC content, healthiness, quality or other characteristics?*

Suggestion	Responses	Percent
Respondents	50	100%
There should be a majority of BC content	10	20%
There should be no restrictions	5	10%
Restrictions are not feasible	4	8%
Should be 100% BC content	4	8%
Should have a healthy qualification	3	6%
Should be a quality criteria	2	4%

- **Recruit processors and producers to participate in the program.**

The key target groups that will be involved include producers, processors, and retailers as well as organizations in the food services industry. It is recommended that there be no charge for the use of the logo in order to encourage high participation rates. Strategies that should be used to recruit members include establishing a presence at trade shows, generating earned media, direct contact with key target participants (i.e. major industry groups, companies, retailers, and restaurant chains), working with industry associations to create awareness amongst their members (e.g. through newsletters), and distributing a mail-out using existing mailing lists.

To encourage further participation in the program, additional support services should be

provided to producers and processors including training and other assistance associated with labeling and packaging. Consideration should be given to the development of “how to” manuals, providing training, seminars and instructional websites, providing members with access to consumer research, staging events that provide opportunities for networking, and establishing industry awards for local products.

Both the Steering Committee members and current and past participants in Buy BC believe that demonstrating the value of the brand to potential users is key. In particular, it is important to demonstrate that there will be promotional support for the brand. The responses of the two groups in this area are outlined below.

**RECRUITING LICENCEES**

*Question: What would be the best way to recruit potential licensees?*

Suggestion	Current and Past Users of Buy BC		Committee Members	
	Responses	Percent	Responses	Percent
Respondents	50	100%	22	100%
Demonstrate value	11	22%	9	40.9%
Use industry associations	8	16%	4	18.2%
Provide at low or no cost	5	10%	4	18.2%
Event presentations	3	10%	3	13.6%
Word of mouth	3	10%	2	9.1%
Website	1	2%	-	-

- **Establish a simple monitoring system for reporting and following up on unauthorized use of logos, inappropriate use of materials, and breaches of the licensing agreements.**

The monitoring system should include:

- Having processors and producers sign licensing agreements which outline their rights and responsibilities.
- A reporting system consisting of a link through the website as well as a telephone number that people can use to report situations where the materials or logos are not being used appropriately (e.g. identifying products from outside of BC as local products). In other jurisdictions, most incidents are reported by competitors and other industry participants.
- Encouraging merchandisers employed by the program to ensure that point-of-purchase materials are used appropriately by retail and food service organizations as well as report any situations where it appears the logos are not being used appropriately.
- Having representatives associated with the branding program follow-up on credible reports that they receive.

The costs of implementing a more proactive monitoring system would outweigh the benefits.

**Goal #2: Ensure that the purchase criteria employed by our consumers place a high priority on BC products.**

The major actions that are recommended include:

- **Undertake consumer research to assist in the development of the branding strategy and provide benchmark data against which to track the impact of the program.**

Many of the other regions we reviewed started with consumer research, including surveys and focus groups, to discover what consumers want and what the best methods are to appeal to consumers.

- **Develop and implement a consumer marketing program.**

Key components of the consumer marketing program should include:

- Development of a website targeted at consumers, producers and processors, retailers and the food service industry. The website could provide information on BC products, participating organizations, brand, marketing campaign, merchandising program and industry program. In addition, the website could feature seasonal products and promotions, highlighting retailers and restaurants which are currently featuring BC products.
- Media advertising (billboards, TV, radio, print). One objective of the advertising program could be to drive consumers to the website and, through the website, to retailers and restaurants which are featuring BC products in current promotions;
- Generation of media coverage (earned media); and
- Establishment of a designated month (or two) for promoting BC products. Much of the media advertising program should be implemented in the designated month.

Over time, consideration could be given to other forms of promotion including specialized magazines and sponsorships for special events and shows. Both the Steering Committee members as well as participants in Buy BC (as outlined below) recommended media advertising as the focus of consumer marketing activities.

**PROMOTION TECHNIQUES**

*Question: What activities do you recommend be undertaken to promote the BC Brand?*

Suggestion	Responses	Percent
Respondents	50	100%
Media/advertising	27	54%
In-store promotions	6	12%

Trade shows	4	8%
School programs	3	6%
Special events (e.g. dinners)	3	6%
Partnering with other groups (e.g. Chefs)	2	4%
Cooking shows	2	4%
Website	1	2%

**Goal #3: Ensure that our retailers, food service operations and institutional buyers feature BC products.**

The major actions that are recommended include:

- **Establish an on-going advisory committee involving representatives of retailers and the food service industry.**

A critical component of the branding program will be to coordinate advertising and merchandising programs with representatives of the retail and food service industry. Towards this end, a working committee should be established to assist in designing elements of the branding program, particularly the merchandising program.

- **With input from the committee, design and develop a merchandising program for retailers and the food service industry.**

Over time, the advisory committee should provide feedback on the impact of the branding program and provide recommendations for improvement.

- **Implement a merchandising program to work with retailers and the food service industry to increase the onsite profile of BC products.**

The merchandising program will involve:

- Developing and distributing point-of-purchase materials and other collateral;
- Developing promotions with retail and restaurant chains;
- Having merchandisers go into retail and food service operations to provide support in setting up and using the materials.

As currently envisioned, the merchandising program would be a twice annual promotion (with one of the promotions corresponding to the month designated for promoting BC products). Subject to the recommendations provided by the advisory committee, the merchandising program would be coordinated with other industry promotions (such as Vegetable Commission activities) and distribute product display and point-of-purchase (POP) materials to retailers such as window posters, banners, triaramas, shelf talkers and product stickers. The merchandise representatives would work to build a relationship with retailers and encourage them to utilize

the materials and feature BC products in their flyers and stores. In addition, logos, fresh sheets, buttons and tent cards could be distributed to restaurants.

**Goal #4: Ensure that the provincial branding program complements and is coordinated with other marketing initiatives ongoing in BC.**

The major actions that are recommended include:

- **Maintain the Steering Committee.**

The Steering Committee should continue to meet to coordinate activities, facilitate communication, and oversee development and implementation of the program as well as the progress made.

- **Develop an application driven program that will provide cost-sharing support for industry sponsored and led marketing initiatives designed to promote BC products within the province.**

The program will provide funding to industry groups on a cost-shared basis (e.g. providing matching funding) for industry led marketing initiatives that are consistent with the objectives and strategies of the branding program.

- **Implement the industry marketing program.**

Implementation will require creating awareness of the program, establishing a system for reviewing and approving applications, administering the funding, and ensuring follow-up to assess the impacts generated.

- **Conduct consumer tracking studies to assess the progress made by the branding program on an on-going basis.**

The tracking studies should update benchmarks and measure campaign awareness based on an annual survey of about 1,000 consumers province wide. In addition, a formal evaluation of the program should be undertaken every three to five years. An evaluation framework should be developed once the formal branding strategy is in place.

## **5. Branding Strategy**

A branding consultant would be engaged to develop the formal branding strategy. The Steering Committee has suggested that:

- **New positioning should be developed for the program.**

As an example to support rationale for a provincial brand, the following questionnaire chart is offered below.

Questions: *Would you be in favour of keeping Buy BC as the brand?*

Reason for support	Respondents	Percent
Respondents	50	100%
I like the logo and tag line	18	36%
It is a recognized and well known brand	9	18%
The public like it	7	14%
It is an effective promotional program	6	12%
It should be updated	4	8%
There is public money already invested in it	2	4%

However, the Steering Committee believes that a new program featuring a new name and tagline would be in a better position to generate excitement and garner support from both industry and government.

- **That brand should emphasize quality, freshness, environmental and economic benefits.**

In terms of product attributes, it was recommended that the brand focus more heavily on quality, and freshness. A strict focus would not be consistent with the broad range of aquaculture and food products produced in the province. The current and past participants in Buy BC also recommended a focus on quality and freshness.

**MESSAGE THEMES RECOMMENDED BY BUY BC PARTICIPANTS**

Questions: *What should be the key messaging associated with the brand?  
What do we want to say about BC food products?*

Themes	Responses	Percent
Respondents	50	100%
Quality	20	40%
Freshness	15	30%
Emphasize local source of the food	15	30%
Support the local economy	14	28%
Safety/Health	6	12%
Environmentally friendly industry	4	8%
Good value	4	8%

- **The branding program should focus on the BC market.**

The primary focus of most agri-food branding programs, especially those based on a region, province, or state, is the domestic market. There may be opportunities to expand the focus of the program to include markets outside of BC (e.g. other provinces) over time, particularly through support for industry sponsored initiatives. The Canadian brand is most appropriate with respect to branding in most export markets.

## **6. Implementation**

The major recommendations with respect to implementation of the program are as follows:

- **A provincial branding program requires primary Provincial Government funding support to achieve the needed critical mass for success.**

Most branding programs are funded primarily by the state or provincial government, reflecting that the program contributes to the public good and the direct benefits are widely distributed across a highly diverse industry.

- **An industry sponsored component should be incorporated into the program design in order to leverage government funds with funding from industry sources.**

Under this program, industry groups could apply for funding under a cost-shared basis to promote sales of BC agri-food products.

- **Delivery of the program should be industry led.**

It is recommended that the BC Agriculture Council continue to play a lead role implementing the program, possibly in association with the BC Food Processors Association to ensure that both the producer and processors segments are directly involved in program delivery. However, recognizing organizational capacity limitations, alternate organizational model(s) could be considered.

### III, KEY SUCCESS FACTORS AND NEXT STEPS

This chapter provides outlines some of the key success factors for a provincial branding program and identified next steps in the development process.

#### A. KEY SUCCESS FACTORS

Some of the key factors that will determine the ultimate impact of the branding program include:

- The extent to which key partners, including government, industry and other stakeholders, commit sufficient resources and other support to the branding program over the medium to longer-term.
- The extent to which the branding strategy is based on strong research and is consistent with the characteristics of the groups targeted.
- The level of coordination and cooperation between the key stakeholders including government, producers, processors, retailers, food service operations, other branding and marketing initiatives and others.
- The level of leadership provided by government, industry and other stakeholders including the presence of key champions for the program within the various organizations.
- The ability to track results over time as a means to demonstrate the impacts to funding sources and program participants as well as to provide the feedback needed to improve the program over time.

#### B. NEXT STEPS

The next steps that should be taken include:

1. **Review the proposed structure of a provincial branding program as outlined in this report and provide feedback to the consultant.**

The consultant should recognize and emphasize longevity and time required to build brand equity.

2. **Engage a professional branding consultant to develop a formal branding strategy.**

The consultant will identify and assess options while coordinating the design of brand name, logo, and taglines as well as provide recommendations for the advertising and merchandising program.

3. **Conduct the initial consumer market research.**

A survey of 1,000 BC consumers should be undertaken to assist in the development of the branding strategy and provide benchmark data against which to track the impact of the program.

4. **Secure funding for implementation of the branding program.**

The key targets for funding are the Ministry of Agriculture and Lands and the Investment Agriculture Foundation of BC. A detailed budget will need to be developed for the program. The budget for Buy BC program averaged nearly \$2.0 million in the mid-1990s, of which 35% was used for

communications, 40% for industry partnership programs, and 25% for implementation and evaluation.

**5. Establish the delivery structure.**

BC Agriculture Council and the BC Food Processors Association, in concert with food service and retail sectors, should play a significant role in the branding program implementation to ensure that both the producer and processors segments are directly involved.

**6. Establish the advisory committee for merchandising.**

The advisory committee, which will include representatives of retailers and the food service industry, will assist in designing the merchandising program while monitoring and enhancing it over time.

**7. Develop the website for the brand.**

The website will be targeted at consumers, producers and processors, retailers and the food service industry. In addition to information on BC products, participating organizations, on-going promotions, the brand, marketing campaign, merchandising program and industry program, it will include a simple monitoring system for reporting unauthorized use of logos, inappropriate use of materials, and breaches of the licensing agreements.

**8. Create awareness of the branding program in the industry and recruit potential members.**

Before the recruitment activities can begin, formal criteria defining what constitutes a BC product need to be finalized as does a standard licensing agreement which outlines licensee rights and responsibilities. Once these are in place, a recruitment program can be implemented involving mail-outs to potential participants, direct contact with key targets, working with industry associations, presentations at trade shows, generating earned media.

**9. Implement the promotional program.**

The key elements of the program will include:

- Establishment of a designated month (s) for promoting BC products.
- An advertising program, possibly consisting of billboard, TV, radio, and print advertising.
- A merchandising program, which will involve developing and distributing point-of-purchase materials and other collateral, developing promotions with retail and restaurant chains, and having merchandisers go into retail and food service operations to provide support in setting up and using the materials.
- An industry fund that will provide funding to industry groups on a cost-shared basis for industry led marketing initiatives that are consistent with the objectives and strategies of the branding program.

**10. Track the results of the program.**

Consumer tracking studies will assess the progress made by the branding program on an on-going basis. The Steering Committee will meet annually or semi-annually to review the results, recommend improvements to the program, coordinate activities, and facilitate communication.

## **APPENDIX I: FOOD BRANDING AND PROMOTIONAL INITIATIVES IN BC**

This appendix provides an overview of existing and proposed initiatives which may impact the brand positioning of BC agri-food products and services in local, regional and export markets. These initiatives include:

- Government led initiatives, including BC Government brand, Tourism BC, ActNow, the 2010 Initiative, and the Federal Government's National Branding Initiative;
- Non-government/agency led initiatives including the Agritourism Alliance, Go Wild/BC Salmon, Tourism BC, BC Cuisine, the 5 to 10 a Day Program, Health Check, and the BC Certified Organic Program;
- Regional initiatives, including initiatives from the Peace River region, Vancouver Island, and the Fraser Valley;
- Major product branding initiatives, including BC Hot House, the BC Dairy Foundation's milk promotion initiative, and the Vintners Quality Alliance program;
- Retailer initiatives; and
- The Buy BC program.

### **A. GOVERNMENT LED INITIATIVES**

There are three main related government led initiatives including ActNow, the 2010 Initiative, and the Federal Government's National Branding Initiative.

#### **1. Act Now/Partners in Healthy Eating**

The Partners in Healthy Eating program is part of the ActNow BC program. The focus of the initiative is to "promote, support and encourage agri-food industry initiatives and activities that proactively 'make the healthy choice the easy choice' for British Columbians, and to provide as many BC products as possible to meet their healthy food choices."

The activities of the initiative include the following:

- Designing a strategic plan. An RFP is being prepared for the preparation of a four year plan.
- A pilot Healthy Eating Forum was conducted in Whistler to develop regional strategies and activities, showcase local food products and provide input for the strategic planning process.
- Researching a marketing strategy. An identification program is being considered which will include options for enhancing the distribution system for BC food products.
- A Communication Strategy is being developed which will inform industry groups regarding health and nutrition issues, related activities, and market opportunities.

- Special events, such as BC Food Expo have been targeted for messaging and will continue to be accessed.

A Steering Committee has been formed that includes BCAC; BC Food Processors Association; Canadian Council of Grocery Distributors; Canadian Restaurant and Food Services Association; BC Seafood Industry; and the Ministries of Agriculture and Lands and Ministry of Health. The funding for the initiative is provided by the two provincial ministries.

The BC Agriculture Council is managing the program for the following partners:

- Associated Ginseng Growers of BC
- BC Agriculture Council
- BC Agri-tourism Alliance
- BC Berry Associations
- BC Cattlemen's Association
- BC Culinary Tourism - Healthy Dining Program
- BC Dairy Foundation
- BC Farmers' Markets Association
- BC Food Processors Association
- BC Functional Food and Nutraceutical Network
- BC Ministry of Agriculture and Lands
- BC Ministry of Health
- BC School Fruit and Vegetable Program
- BC Seafood Alliance
- Canadian Council of Grocery Distributors
- Canadian Restaurant and Food Services Association
- Certified Organic Associations of BC
- Overwaitea Food Group
- Ryan Vending
- Small Scale Food Processors Association

The initiative contributes to the province's plan to have the healthiest population that has ever hosted an Olympics. Other efforts in this area include a school snack program that provides BC fruit and vegetable to schools.

## **2. 2010 Initiative**

In March 2005, the Provincial Government established a fund to promote BC food and beverage products and develop agriculture and cuisine tourism focused on the five years before and after the 2010 Olympic and Paralympic Winter Games. The 2010 Industry Opportunities Fund is a \$1 million fund to support programs that develop products and services in this area. The Investment Agriculture Foundation is managing the fund for the province and is developing a strategic plan with the assistance of an industry Advisory Group that includes representatives from a broad cross-section of industry and potential program partners.

Potential initiatives being undertaken under this funding may include:

- Developing BC Brands to capture core attributes, values and benefits;

- Marketing plan development including sector specific marketing strategies;
- BC Innovation Showcase – on line and physical showcase to promote BC;
- Healthy BC 2010 – making BC one of the healthiest & most active hosts;
- Taste of BC to showcase BC foods and beverages at the 2010 games; and
- Tourism BC activities

### **3. Federal Government National Branding Initiative**

The Federal Government is working with the provincial governments and the agri-food industry to develop a National Branding Strategy for the Food and Agriculture Sector. The intent is to raise the profile of Canadian food products and stimulate international demand. Research indicates that Canada has a high profile as a country but agricultural products do not share this profile. The initiative is designed to leverage the positive image of Canada held by foreign consumers into higher recognition of the quality and variety of Canadian food products.

The initiative is voluntary and its success will depend on the level of participation by government and industry stakeholders. Various groups are using elements of the initiative to strengthen local efforts. Through sectoral National Value-Chain Roundtables, for example, many sub-sectors are benchmarking against competitors and developing strategies aligned with the Canada Brand. Other initiatives are building on strengths in the areas of food safety and quality and environment. The branding initiative will assist in establishing a profile for these strengths. An International Branding Working Group (established in 2004) is facilitating collaboration and industry input and provides advice to AAFC's Branding Management Team. The initiative is funded and led by Agriculture and Agri-Food Canada.

The initiative is research based and there have been a number of surveys with consumers and buyers in international markets including the US, UK, Germany, Japan, and Mexico. The surveys determined what is important to consumers in these markets and how Canada performs. The tag line is "Quality is in our Nature" and the logo is a ribbon and stylized maple leaf. The focus is on international markets.

## **B. NON-GOVERNMENT/AGENCY LED INITIATIVES**

Related branding projects operating in BC that are not directly administered by government (though may have government funding) include the Agritourism Alliance, Go Wild/BC Salmon, BC Cuisine, the 5 to 10 a Day Program, Health Check, the BC Certified Organic Program and the BC Dairy Foundation's milk promotion initiative.

### **1. Supernatural BC**

Tourism BC's brand, the famous "Supernatural BC" tag line is used purely for tourism marketing and Tourism BC is not directly engaged in a branding exercise related to food. However, their tourism marketing does include food experiences. The agency is working on a strategy to include wine and culinary aspects in their marketing plans. The strategy will focus on people who would come to BC for a "culinary vacation."

### **2. Agritourism Alliance**

The British Columbia AgriTourism Alliance (BCATA) was incorporated in 2002 with a mandate "to facilitate the development of an inclusive and viable provincial agritourism sector." BCATA operates with a Board of

Directors made up of industry stakeholders and private businesses interested in developing a sustainable agritourism sector. A government liaison group from the Ministry of Agriculture, Food and Fisheries and Tourism BC provides support

The main activity of BCATA currently is to manage the delivery of the BC AgriTourism initiative of the Agri-Food Futures Fund (AFFF). The three-year plan includes the following elements:

- research and analysis of current challenges and opportunities facing agritourism;
- identification of potential strategic partnerships and alliances, a comprehensive survey of existing agritourism operations throughout the province;
- quantification of the economic benefits of agritourism;
- the development of an information technology infrastructure which will link existing resources and host new ones;
- the creation of a product development and marketing strategy; and
- the gathering of information in preparation for industry awareness, education and marketing programs which will foster the development of market-ready, high quality agritourism experiences.

### **3. Go Wild/BC Salmon**

This is a slogan used by the BC Salmon Marketing Council to highlight ocean caught salmon from British Columbia. Specific objectives under the brand include:

- benefit and promote the BC wild salmon industry;
- conduct research and educational programs for the development and promotion of commercially harvested BC wild salmon, and
- communicate to national and international markets the quality, availability and value of BC wild salmon.

### **4. BC Cuisine**

The BC Cuisine and Tourism Society is initiating a program to promote BC food use in BC restaurants. The Society will promote the unique flavor and dining experiences available in the province. Consumers will be able to determine via a website which establishments are utilizing BC sourced food in their menus. Restaurants will need to use 51% BC products to be able to be on the list and display the society logo.

### **5. 5 to 10 a Day Program**

The 5 to 10 a day program is a national Canadian program. The program was developed from the foundation of the Reach for it! 5 to 10 program in Canada and re-launched as “5 to 10 a day Are you getting enough?” in 1999. Since the launch of the new program, 5 to 10 a day has established a 41% brand awareness within Canada (AC Nielsen 2003) and continues to deliver a clear message on why Canadians should eat their 5 to 10 servings of vegetables and fruit per day.

The goal of this initiative is to reduce the risk of cancer and cardio-vascular disease, by encouraging Canadians to consume at least five servings of vegetables and fruit a day as part of a healthy diet (as described in Canada's Food Guide to Healthy Eating), and as part of a healthy lifestyle. The aim of the campaign is not only to create awareness, but also to change people's eating habits, within a healthy, active lifestyle.

The Heart and Stroke Foundation of Canada and the Canadian Cancer Society support and participate in this campaign. The Canadian Produce Marketing Association (CPMA) has a national network of retail grocers and industry members who assist in the implementation of the public education strategy.

The objective of “5 to 10 a day” is to elicit behavioural change. The approach used is that of a social marketing campaign, through a “Pull” marketing initiative using mass media, community outreach and educational opportunities, to assist people in improving their eating habits.

The message is being delivered via a variety of media, including PSA advertising (television, radio and print), brochures, in-store displays, retail grocery flyers, media relations and community outreach to disseminate its message. CDROMs, point-of-purchase, and special event materials will also be used. Regional public health offices also play a vital role in disseminating information and providing literature to their constituents through school boards, public health units, workplace cafeterias and other centres.

## **6. Health Check**

Health Check™ is the Heart and Stroke Foundation's food information program. All participating products in this program are evaluated by the Foundation's dietitians and must meet specific nutrient criteria based on Canada's Food Guide to Healthy Eating. Products with the recognizable Health Check™ logo on the package have an explanatory message telling you how that food fits in with healthy eating.

The Health Check logo can be found on food products in all food groups identified in *Canada's Food Guide to Healthy Eating*. They include:

- grains;
- vegetables and fruits;
- milk products;
- meat; and
- combination foods.

## **7. BC Certified Organic Program**

The British Columbia Certified Organic Program is a voluntary agri-food quality program sanctioned by the Government of British Columbia through the Organic Agricultural Products Certification Regulation under the Agri-Food Choice and Quality Act. The Certified Organic Associations of BC is designated as the provincial program administrator that monitors the program's credibility and acceptance in domestic and international markets.

Since 1993 the program administration activities have been focused on auditing its member associations for compliance. The program's official mark is comprised of the prescribed phrase "British Columbia Certified Organic" and the symbol "checkmark in a box". The Association's program activities include:

- Cyber Help: Organic farming and information for farmers;
- Canadian Organic Initiative: Development of National Strategic Plan for Organics;
- Organic Environmental Farm Program: Education for Environmental Farm Planning;
- Organic Harvest Awards; and
- Organic Sector Development Program: (Agri-Food Futures Fund) Strategic Plans to address production capacity, marketplace development and promotion, and organic environmental stewardship; and Standards.

## **8. FarmFolk/CityFolk Society**

The mission of the Society is to cultivate a local, sustainable food system. The FF/CF works with food communities on projects that provide access to & protection of farmland; that support local, small-scale growers and producers; and that educate, communicate and celebrate with local food communities. The Society is currently working with the Farmers Market Society to launch an “Eat Local” initiative. The initiative is in the early stages of development and a seminar is planned for November, 2006 to discuss the possibilities. The intent of the society is to undertake a public education campaign geared towards both the media and the public. This campaign will be launched during mid-May 2007.

## **C. REGIONAL INITIATIVES**

Some regions of the province are using branding as a strategy to increase the sales of local produce. A description of these regional initiatives appears below. They include initiatives from the Peace River region, Vancouver Island, and the Fraser Valley.

### **1. Peace River**

The Peace River region, including the BC and Alberta parts of the Peace, has formed an association to promote the area’s products. The Branding the Peace Country Association was incorporated in 2004. The association operates on a membership system with members paying for the privilege of using a Peace Country logo that indicates a high level of quality assurance, best practices, and environmental stewardship. The Association promotes made in the Peace products on a regional, national and international level with media campaigns and press placements. A website illustrates the range of products available and how to access the products.

The Association operates with a president, vice president, secretary treasurer and 7 directors from across the region. Working groups in various areas (agriculture, tourism, the arts, media, manufacturing) set brand standards.

### **2. Vancouver Island**

On Vancouver Island, a group of 100 growers and producers have come together to support direct farm sales to local buyers. The Southern Vancouver Island Direct Farm Marketing Association is a non-profit association of farmers who sell their farm and vineyard products directly to consumers. Many of the association’s members also participate in agritourism, including farmers' markets, fall fairs, farm festivals, farm tours and bed & breakfasts.

The major activities of the association include:

- publication of an annual "Farm Fresh" consumers guide;
- management of the association website;
- organization of the annual "Tour of Farms in July; and
- participation in a special Farmers' Market at the historic Saanich Fair on the Labour Day weekend.

Another Island initiative is the Island’s Farmer Alliance, which began in 2000. This is a group of producers from Southern Vancouver Island and the Gulf Islands that promote buying local produce. The group uses a logo (a rooster) with the slogan “*Fresh from the Island*” to identify local food products. The group’s

objectives are to:

- ensure the sustainability and growth of Island Agriculture;
- strengthen unity among Island producers;
- build a vibrant and healthy agricultural industry;
- promote and market agriculture and agricultural products on and from the Islands;
- review and improve government policies and regulations;
- improve management of resources affecting Island agriculture;
- improve communication and awareness of agriculture as an important economic contributor to the Island and Coastal Communities;
- support opportunities for growth that offer potential for both primary and secondary agriculture, leading to increased employment, skills and services to the industry; and
- grow and develop agriculture and the food industry on a regional level, through public education and consumer awareness.

The Alliance has members sign a code of ethics before permitting them to use the logo and slogan. The code of ethics includes assurances of the following:

- high standards of quality and freshness;
- health and safety;
- honesty and integrity;
- stewardship of the land and water;
- animal welfare;
- creating an awareness of the importance of agriculture and “Fresh from the Island” products; and
- contributing to the advancement of Island agriculture.

### **3. Fraser Valley**

The Fraser Valley Farm Direct Marketing Association was formed in 1994 to develop and promote markets for farmers selling direct to consumers. The slogan used is “Fresh from the Farm”. The association has 68 members. Its activities include the following:

- A Farm Fresh Guide listing all member farms with descriptions, locations, and a product index;
- A website, [bcfarmfresh.com](http://bcfarmfresh.com), to put consumers in touch with growers;
- A newsletter with information for farm direct marketers;
- Access to a network of farm direct marketers with experience in a wide range of areas; and
- Opportunity to be part of local marketing programs and other marketing initiatives such as media tours and others.

The association is financed by member dues and does not receive grants or other public sector support.

## **D. PRODUCT BRANDING INITIATIVES**

There are various branding initiatives operating in BC that focus on particular products. Examples of these include the BC Hot House brand, the Canadian Dairy Council’s locally produced milk campaign, and the Vintners Quality Alliance program. These are described below.

### **1. BC Hot House**

The BC Greenhouse Growers Association was first organized in 1973. In 1997, the Association was incorporated as BC Hot House Foods Inc. From 1997 to 2002, the BC Vegetable Marketing Commission required all greenhouse growers to market through this organization. In 2002, the growers were allowed to choose their own marketing mechanism. BC Hot House Inc. is now a private company marketing for 30 growers who represent 56% of the greenhouse space in BC. Packaging services are also offered. The brand has very wide recognition in British Columbia. Most consumers assume that the company only markets BC product while, in fact, produce from Mexico and the US are also handled by the company.

### **2. BC Dairy Foundation**

The BC Dairy Foundation administers a promotional campaign to encourage people to drink more milk. The program used a “milk splash” logo with the tag line of “Survival of the Fittest”. The initiative focuses on the nutritional value of milk through events, media campaigns, a website, a nutrition program and a school milk program. The efforts are funded by an obligatory industry levy on producers.

The industry also uses the logo of the Canadian Dairy Council, which is a blue cow with a maple leaf. It is intended to identify 100% Canadian dairy products. The tag line is “Canadian dairy products, the taste of home”. In 2004, the Council began using the phrase “Best with the little blue cow” to convey the idea of “homegrown goodness and standards”. Producers can buy a catalogue of logos, signs and road signs. Farms are encouraged to display the logo. Another program is to put the logo on dairy tank trucks as moving billboards.

### **3. Wines of British Columbia (BC VQA)**

First introduced in 1990, the Vintners Quality Alliance (VQA) is a system by which consumers can identify wines of Canada based on the origin of the grapes from which they are produced. The Alliance enforces standards and quality. Wines are evaluated by an independent panel of experts and only those that meet or exceed the standards are awarded the VQA designation. Such wines may show a VQA medallion on the bottle or label. In addition, the VQA gold medallion is awarded to wines that show exceptional quality, as judged by the VQA tasting panel.

The VQA designation indicates that the wine has undergone rigorous quality control measure. Participation in the VQA program is voluntary. In 1990, VQA wines sales in BC totaled 600,000 litres. In 2004, they totaled over 3,000,000 litres.

The VQA controls minimum Brix levels at harvest, states acceptable oenological practices, prohibits the addition of water, limits the levels of chaptalization (chaptalization is the practice of adding more sugar to the 'must' than was developed naturally in the grapes that have been crushed), controls the use of sweet reserve wine additions, and prohibits the practice of fortification other than in wines labeled as such.

The brand is managed by the BC Wine Institute (BCWI). The British Columbia Wine Institute (BCWI) was created by an act of the provincial legislature, the BC Wine Act, in 1990. BCWI works to build and market the Wines of British Columbia (BC VQA) wine brand, creates the business climate that allows members to prosper, liaises with government and stakeholders on key business and regulatory issues and promotes the industry to key wine, food and travel media.

## **E. RETAILER INITIATIVES**

### **1. Thrifty Foods**

This is a Vancouver Island based grocery chain that makes an effort to support local producers. The buying mandate of the company is to buy first from Vancouver Island and then from BC. Only after efforts have been made to source product locally does the store search for product in other jurisdictions.

The stores use the Buy BC “BC Grown” logo to identify BC produce. There are no in-store promotions of BC produce. However, every summer the chain runs an ad campaign tagged “Go Home Grown” for 2 to 3 weeks. During this campaign in-store and outside signage as well as print advertising are used to promote locally grown produce.

### **2. The Overwaitea Food Group**

This is a corporation that operates Overwaitea, Save-On Foods, Price Smart Foods, Cooper’s Foods, Urban Foods and Bulkley Valley Wholesale. The corporation does some promoting of BC products recognizing many consumers’ preference for local products. The main focus of their promotion is signage and in-store displays.

### **3. Super Valu**

Super Valu reports being interested in using BC product promotion to facilitate customer loyalty. The chain uses posters and in-store displays to identify BC products. Super Valu is currently running a campaign to promote BC apples. There are posters, displays, bins of apples and advertising in use to promote BC apples.

### **4. Other retail**

Other retailers we interviewed reported using various means to identify and promote BC food products. The Buy Low stores use print advertising. Capers uses flyers and in-store displays. IGA has banners and shelf talkers with BC themes.

## **F. BUY BC PROGRAM**

The Buy BC campaign was originally launched in 1993 as a Provincial Government program designed to increase consumer awareness and preference for BC food, fish, beverage and agricultural products within the province. The Program encouraged co-operative marketing initiatives that contributed to economic benefits to the BC agri-fish-food industries. Cost-shared financial assistance was provided to support incremental generic marketing activities that met market development purposes, objectives, strategies and goals. The objectives of the program were to:

- Increase awareness of BC food and beverage products among consumers and the trade;
- Build a unifying brand identify for BC products;
- Build on consumer preference for BC products over competitors and generating trade; and
- Increase participation in promoting BC products, especially among major grocery retailers and food service operators.

Program funding was available for a broad range of activities: product identification, contests, product demonstrations, advertising, public relations, point-of-sale promotions, coupons, coop advertising, market planning and research. Funding for projects was intended to support incremental market development and not substitute ongoing promotions. The program provided Buy BC labelling at no cost to eligible products to be used by individuals, firms, associations, commodity groups, councils, institutes, commissions and marketing boards as well as other government ministries and agencies.

Special initiatives included:

- Farmers' Market program;
- BC Sharing program for donations to community food banks;
- Buy BC Month/Events; and
- BC Cuisine.

Subsequently, the funding was reduced and the program went to a user-fee basis. There are now 50 companies and associations using the Buy BC logo in their advertising and promotional materials. Each member of the program pays a fee determined by the number of employees.

Program activities include:

- Use of the recognized BUY BC logo;
- Use of channel strips to identify BC product in stores;
- In store special promotions; and
- Buy BC road signs.

The program is managed by the BC Agriculture Council through a Board of Advisors. This board consists of representatives from the following groups:

- Processors;
- Producers;
- Retailers;
- Restaurant and Food Services; and
- The Canadian Association of Food Banks, B.C. Chapter.

When the program moved to the Agriculture Council of BC, it was hoped that sufficient revenue would be generated to fund additional activities such as consumer and product research and website promotions.

A group that works with BUY BC to promote local food products is the BC Association of Farmers' Markets. The association has an elected Board of Directors made up of member markets. The association has the following objectives:

- to support British Columbia producers of agricultural products, food products, and crafts;
- to promote, educate, encourage, develop and support farmers' markets in the communities of BC;
- to host an annual conference for the members and associate members;
- to represent the farmers' markets of BC in all matters in which they are generally interested; and
- to advocate to industry, government, agencies, commissions and boards on matters which impact and interest the members.

The group was formed in 2000 to represent the 60 farmers' markets in BC. The activities include:

- A group insurance program for members;
- A brochure;
- A website; and
- Annual conference.

As part of Phase I, we conducted interviews with 43 organizations that are currently members of Buy BC or who have participated in the past. A partial summary of the findings is provided below.

- Of the organizations that we interviewed, 23 are currently participating in the program.

Reasons given for no longer participating in the program include:

- High cost;
  - Low profile of the initiative; and
  - Lack of information available.
- The current and past members had a variety of objectives for participating in the program.

The most common reasons were to use the logo, keep pace with competitors who use it, take advantage of in-store promotions, use the signage, take advantage of generic advertising, and support local suppliers.

- The present and past participants indicated that they are/were somewhat satisfied with the program.

When asked to rate how successful they have been in achieving their objectives on a scale of 1 to 5, where 1 is not at all successful, 3 is somewhat successful and 5 is very successful, the average rating was 2.9. Reasons given for high ratings included:

- Lack of resources to market by themselves;
- Consumers want to buy local products;
- The logo is still recognized; and
- It is effective in increasing sales.

Reasons given for low ratings included:

- The program has deteriorated;
- Very difficult to get information;
- Not much advertising done to support brand;
- Difficult to tell if it is effective;
- The product would have sold anyway; and
- The program needs more funding and branding expertise.

## **G. SUMMARY**

The following table summarizes the characteristics of food branding initiatives currently operating in British Columbia.

**SUMMARY OF THE INITIATIVES OPERATING IN BC**

Program	Delivery Agency	Funding Source	Budget	Positioning	Key Initiatives
<b>Partners in Healthy Eating</b>	BC Agriculture Council	Provincial Government	\$315,000	Part of “Act Now” initiative to make BC healthiest jurisdiction to host Olympics	<ul style="list-style-type: none"> <li>• Strategic plan</li> <li>• Healthy Eating Forum</li> <li>• Researching a marketing strategy</li> <li>• Communication Strategy</li> <li>• Special events</li> </ul>
<b>BUY BC</b>	BC Agriculture Council	User Fees	\$26,000	Support local producers	<ul style="list-style-type: none"> <li>• Use of the recognized BUY BC logo</li> <li>• Use of channel strips to identify BC product in stores</li> <li>• In store special promotions</li> <li>• Buy BC road signs</li> </ul>
<b>Go Wild/BC Salmon</b>	BC Salmon Marketing Council	Levy on landed value of the fish	\$200,000 (all activities)	Unique taste Nutritional benefits High Quality Use maple leaf for exports	<ul style="list-style-type: none"> <li>• Trade Shows</li> <li>• Promotional material</li> <li>• Web site</li> <li>• Salmon Market Database</li> <li>• Research and educational programs</li> </ul>
<b>Wines of BC</b>	BC Wine Institute	Members	\$900,000 (VQA and Wines of BC)	Only high quality wine deserve the logo	<ul style="list-style-type: none"> <li>• Standards and quality</li> </ul>
<b>BC Cuisine Tourism</b>	BC Restaurant Association	Grants	\$200,000 – had seed money – now looking for partners	The unique flavour experience of local BC food	<ul style="list-style-type: none"> <li>• Logo for restaurants</li> <li>• Website</li> </ul>

Program	Delivery Agency	Funding Source	Budget	Positioning	Key Initiatives
<b>Agri-Tourism Initiatives</b>	BC Agri-Tourism Alliance	Members, Investment Agriculture Foundation	\$200,000	ID food as local and high quality	<ul style="list-style-type: none"> <li>• Research</li> <li>• Identification of partnerships</li> <li>• Operations survey</li> <li>• Quantification of agritourism economic benefits</li> <li>• Information technology infrastructure</li> <li>• Product development and marketing strategy</li> <li>• Industry awareness, education and marketing programs</li> </ul>
<b>2010 Initiative</b>	Investment Agriculture Foundation	BC Government	\$1 million fund	Unique BC food experiences	<ul style="list-style-type: none"> <li>• Develop a BC Brand</li> <li>• Marketing plan</li> <li>• Develop food service market</li> <li>• Taste of BC to show case BC foods and beverages at the 2010 games</li> </ul>
<b>“Fresh From the Farm”</b>	Fraser Valley Farm Direct Marketing Association	Members fees	\$23,000	Local food is fresher	<ul style="list-style-type: none"> <li>• Member Guide</li> <li>• Website/Newsletter</li> <li>• Access to experienced farm direct marketers</li> <li>• Local marketing programs</li> </ul>
<b>“Fresh from the Island”</b>	Island’s Farmer Alliance	Alliance membership fees	<ul style="list-style-type: none"> <li>• \$90,000 grant to start</li> <li>• Annual budget is \$1200 plus volunteer efforts</li> </ul>	Local food is fresher	<ul style="list-style-type: none"> <li>• Sustainability</li> <li>• Sector unity</li> <li>• Product promotion</li> <li>• Policy review</li> <li>• Public education and consumer awareness</li> </ul>

Program	Delivery Agency	Funding Source	Budget	Positioning	Key Initiatives
<b>"Farm Fresh"</b>	Southern Vancouver Island Direct Farm Marketing Association	User fees	\$50,000	Local food is fresher	<ul style="list-style-type: none"> <li>• "Farm Fresh" consumers guide</li> <li>• Website</li> <li>• Farm Tours</li> </ul>
<b>The Peace Brand</b>	Branding the Peace Country Association	User fees Government grants	Varies by project	Support local producers	<ul style="list-style-type: none"> <li>• Media campaigns</li> <li>• Billboards</li> <li>• Website</li> </ul>
<b>National Branding Initiative</b>	Agriculture and AgriFood Canada	Federal government	\$1 million/yr for last 2 years	International recognition of Canadian products	<ul style="list-style-type: none"> <li>• Brand strategies</li> <li>• International brand audits</li> </ul>
<b>British Columbia Certified Organic</b>	Certified Organic Associations of British Columbia	Member fees	Varies according to activities	Certifying produce as organic	<ul style="list-style-type: none"> <li>• Trade shows</li> <li>• Magazine</li> <li>• Events</li> </ul>
<b>Drink Milk</b>	BC Dairy Foundation	Industry levy	\$5 million	Milk as a healthy alternative to soft drinks	<ul style="list-style-type: none"> <li>• Trade shows</li> <li>• Media</li> <li>• School programs</li> </ul>
<b>Health Check</b>	Heart and Stroke Foundation	Member Levies	\$1 million	Making healthy choices	<ul style="list-style-type: none"> <li>• Television, Radio and Print</li> <li>• Logo on food packages</li> <li>• In store promotions</li> <li>• Trade shows</li> <li>• Website</li> </ul>

Characteristics which are common to many of the programs include:

- **Identification of food as locally grown or processed.**

Consumers are increasingly interested in where their food originates and in supporting local products. Consequently, the branding programs focus much of their efforts to identifying the products that can be considered “local”. Using logos, catalogues and websites, the initiatives work to allow the consumer to determine which of the many food products are from local sources.

- **Claims of superior qualities.**

Many initiatives use the logic that produce which does not have to travel as far will arrive at the store in a fresher state than imported produce. Some indicate claims for superior quality and link the concept of local with that of high quality. Some do have quality assurance systems (VQA) but others make this claim without such systems in place. Others make use of superior nutrition or health features to set their product apart from others.

- **Involvement of the public sector.**

Most initiatives have (or have had) significant government involvement either through direct funding or administration by a government supported agency. There are some that are self-sustaining. These tend to be small in scope or have the advantage of an obligatory industry levy.

- **Promotional activities.**

Each branding initiative engages in efforts to give their brand a higher profile within the marketplace. Promotional activities usually include at a minimum, media campaigns, logo and tagline signage, a website, special events, and product catalogues.

## APPENDIX II: BRANDING INITIATIVES IN OTHER JURISDICTIONS

This appendix summarizes the results of our research regarding programs and initiatives that have been implemented in other jurisdictions to increase demand for local agri-food products and services, the impact of branding on the demand for agri-food products, and best practices for branding programs.

### A. BRANDING PROGRAMS IN CANADA

In addition to the new national branding program in Canada, there are a number of province-based initiatives that resemble the US state based programs. Examples of provincial food branding initiatives in Canada are outlined below.

- **Ontario**

Ontario has a new branding strategy for red meat. This is a joint venture of the Ontario Pork, the Ontario Sheep Marketing Agency and the Ontario Veal Association. The Ontario Red Meat Branding Strategy is designed to enhance the consumer recognition for red meat in Ontario. Ontario also has a Corn-Fed Beef Market Recovery Initiative to develop new markets for a beef brand.

Since 1977 Ontario has used the brand “Foodland Ontario” to promote its fruits and vegetables. Foodland Ontario consists of five program components: consumer advertising, retail marketing, public relations, trade (client) liaison, and market research. The related slogan used is “Ontario, there's no taste like home”.

- **Saskatchewan**

The Saskatchewan Food Processors Association Branding Program (“Saskatchewan Made”) is raising the profile of member processors through a common brand identity. The intent is to create demand within specialty, grocery and food service sectors by using a single brand with a unique image and purchase motivators.

A major part of the initiative is the “Saskatchewan made Marketplace.” This is a physical store and a web based ordering service for food and other products. Sales last year totaled \$700,000. Products are sold on a consignment basis. Other revenue is received from the provincial and federal governments to achieve a total budget of \$1,175,000.

- **Alberta**

The Alberta Food Processors Association has a “Good Food Prepared with Pride” brand and an associated code of ethics which outlines the requirements for member processors to support the integrity of the brand. In support of the brand, members agree to:

- Comply with all applicable federal, provincial, and municipal legislation, regulation, and codes of practice in respect of:
  - ✓ Human health, safety, and nutritional quality
  - ✓ Food inspection
  - ✓ Consumer protection
  - ✓ Product standards, processing, composition and grading
  - ✓ Workplace Health and safety

- ✓ Environmental assessment and protection
- ✓ Animal and plant health
- Not engage in any conduct or practices likely to discredit or do injury to the Alberta food, beverage, pet food, and agri-processing industries or the members of the Alberta Food Processors Association, customers, or consumers.
- Institute programs to acquaint their Alberta employees with the Code.
- Communicate immediately with the Association in the event that their own non-compliance in one of these areas has just occurred or will occur. This communication to cover the nature and circumstances of the non-compliance, the full impact, and the plan to address this non-compliance. Procedures are explained in the Situation Management Policy.
- Cooperate fully with the Association in complying with the spirit and intent of the Bylaws and Code of Ethics of the Association.
- Sign and comply with the Contract of Trademark License regarding use of the Good Food: Prepared with Pride logo.

• **Nova Scotia**

“Taste of Nova Scotia” was launched in 1994. It is an association of 45 producers and processors that cooperate on joint marketing initiatives to enhance the development of the food industry and its members. In order to qualify for membership, prospective companies must demonstrate a commitment to continuous improvement through Quality Assurance documentation. They must also meet the current inspection/regulation/licensing requirements. The initiative is funded by the Nova Scotia Department of Agriculture and Fisheries. The program has revenues of \$160,000 from the provincial government and member fees of \$50,000. Members receive subsidized pricing for trade show participation and access to a variety of government functions. The focus is both domestic and international

**C. BRANDING PROGRAMS IN THE UNITED STATES**

In the United States, state promotions of agricultural products began in the 1930’s as a response to the depression’s affect on farmers. These initiatives were seen as a self-help, market-based solution that would help to carry farmers through this period of decreased demand. In the 1980’s, some state programs began to focus on promoting all products under a single brand. By the 1995, 23 states were using this strategy. In 2001, the US Federal Government provided funding to bolster these branding programs. This funding brought the number of states of state wide branding programs to 43.

Previously, support for these initiatives had come from the states with some private sector contributions. The amount of funding for these programs differs significantly by state. The table below illustrates the extent and the operation of state branding programs.

**US STATE BRANDING PROGRAMS**

State	Program Name or Slogan(s)	Year Established	Budget (\$)	Budget Period
Alabama	A+ Alabama: Best Buy	2001	\$500,137*	2003
Alaska	Alaska Grown, Fresher By Far	2001	295,000	2003
Arizona	Arizona Grown	1993	n/a	n/a
Arkansas	Arkansas Grown	n/a	n/a	n/a
California	Be Californian Buy California Grown	2001	25,500,000*	2003

<b>State</b>	<b>Program Name or Slogan(s)</b>	<b>Year Established</b>	<b>Budget (\$)</b>	<b>Budget Period</b>
Colorado	Colorado Proud	1999	n/a	n/a
Connecticut	Connecticut Grown	n/a	n/a	n/a
Florida	Fresh from Florida	1990	500,000*	2003
Georgia	Georgia Grown	n/a	2,351,133*	2003
Hawaii	Island Fresh	n/a	n/a	n/a
Idaho	Grown in Idaho, Idaho Preferred	n/a	650,000*	2002
Illinois	Illinois Product	1988	n/a	n/a
Kentucky	Kentucky Fresh, Kentucky Proud	2001	800,000	2004-2006
Louisiana	Buy Fresh, Buy Local	2001	n/a	n/a
Maine	Get Real, Get Maine	n/a	250,000 150,000	2002 2004
Maryland	Maryland's Best	2001	n/a	n/a
Massachusetts	Massachusetts Grown...and Fresher!	n/a	n/a	n/a
Michigan	Select a Taste of Michigan	2003	200,000*	2003
Mississippi	Make Mine Mississippi	1999	n/a	n/a
Missouri	Buy Missouri, AgriMissouri	1985	115,000*	2003
Montana	Montana's Choice	n/a	8,300*	2003
Nebraska	Nebraska Our Best to You	2004	n/a	n/a
Nevada	Nevada Grown	2002	n/a	n/a
New Hampshire	New Hampshire's Own	1997	128,291*	2003
New Jersey	Jersey Fresh	1983	826,000	2003
New Mexico	Taste the Tradition	n/a	n/a	n/a
New York	Pride of New York	1985	n/a	n/a
North Carolina	Got to be NC	n/a	n/a	n/a
North Dakota	Pride of Dakota	1985	n/a	n/a
Ohio	Ohio Proud	1993	n/a	n/a
Oklahoma	Made in Oklahoma	n/a	n/a	n/a
Pennsylvania	Pennsylvania Preferred	n/a	295,000	2002
Rhode Island	Rhode Island Grown: Take Some Home	n/a	n/a	n/a
South Carolina	South Carolina Quality	1992	n/a	n/a
Tennessee	Pick Tennessee Products	n/a	500,000*	2003
Texas	Go Texan	1999	400,000	2004
Utah	Utah's Own	2002	n/a	n/a
Vermont	Vermont Seal of Quality	n/a	75,000*	2003
Virginia	Virginia's Finest, Virginia Grown	1989	511,500*	2003
Washington	From the Heart of Washington	2001	2,500,000* 400,000	2001-2003 2004
West Virginia	West Virginia Grown	1987	n/a	n/a

State	Program Name or Slogan(s)	Year Established	Budget (\$)	Budget Period
Wisconsin	Something Special from Wisconsin	1983	n/a	n/a

Funding provided through block grants under the Emergency Agricultural Assistance Act of 2001.  
 Source: NASDA, Personal contacts with state officials.

Examples of some of the US programs are outlined below.

- **“From the Heat of Washington”**

This is a public awareness campaign designed to promote Washington state food and agricultural products. It is facilitated by the Washington State Department of Agriculture, and advised by a diverse board whose membership consists of governmental, food industry, and small farm interests statewide. The program also helps retailers promote Washington grown products to consumers through signage and branding programs. The program commenced in 2001.

In 2006, the initiative launched a \$200,000 multi-tier public education campaign called “Did you know?” The campaign includes television ads (some featuring the Governor), public radio, a Web site redesign and the support of 450 store locations that will post signage and shelf talkers. The point-of-purchase materials feature the HOW logo and the tag line “Our farms to your table.”

During the recent legislative session, state lawmakers allocated \$400,000 – \$200,000 per year – for the From the Heart of Washington campaign. This follows up on the three-year \$2.5 million federal grant the campaign received in 2002. The program is administered by the Washington Department of Agriculture.

- **Louisiana ([www.ldaf.state.la.us/divisions/marketing/marketdevelopment/default.asp](http://www.ldaf.state.la.us/divisions/marketing/marketdevelopment/default.asp))**

Louisiana has developed a number of logos and labels to identify authentic Louisiana products. These include "Certified Product of Louisiana", "Certified Cajun Product of Louisiana" or "Certified Creole Product of Louisiana". Companies that produce or process products in the state can use the logos and also are listed in a Louisiana Agricultural Products Directory.

Various boards promote commodities under these labels. They include:

- Louisiana Catfish Promotion and Research Board,
- Louisiana Crawfish Promotion and Research Board,
- Louisiana Rice Promotion Board,
- Louisiana Soybean and Grain Research and Promotion Board, and
- Louisiana Strawberry Marketing Board.

To counteract rising catfish imports, Louisiana has begun an American catfish awareness campaign that provides logos to restaurants to indicate that the catfish is “100 percent All-American Catfish.”

- **Jersey Fresh ([www.state.nj.us/jerseyfresh/index.html](http://www.state.nj.us/jerseyfresh/index.html))**

This program, begun in 1984, is designed to increase consumer awareness of the state’s agricultural products as well as to encourage food retailers to promote New Jersey products. A March 2004 report claims a return of \$54.49 for every dollar spent on the program. This included an increase in sales of \$36 million, an additional \$26 million of economic activity in related industries and \$2.2 million in additional tax revenues.

- **Arizona Grown**

The goal of this program is to make it easier for consumers, retailers and restaurants to identify and purchase Arizona products. The Arizona Grown logo may be used to promote any food or agricultural item that has been grown, raised or processed in Arizona. To use the logo, companies must submit a license agreement verifying their eligibility and agreeing to comply with the Logo Use Guidelines. There is no cost to participate in the program however shipping costs will be charged. Logo slicks and digital art will be provided at no cost to the company and packaging materials and promotional items will be available at the cost of production. Retailers and restaurants are encouraged to use these logos to promote Arizona products to their customers. The logos may only be used to promote Arizona products. Companies may incorporate the logo into their packaging design using camera-ready or digital artwork; or they may purchase labels to attach to packages, shipping boxes, or directly to produce items.

- **Connecticut Grown**

The Connecticut Grown Program is an ongoing initiative to increase the demand for Connecticut products in the region and outside the region. The main program objectives are:

- Pinpoint Connecticut agriculture's strengths with respect to its economy and geographic location;
- Continue to increase the consumer awareness by using the "Connecticut Grown" logo;
- Establish the meaning and substance of the Connecticut Grown program;
- Educate and inform consumers concerning Connecticut farm products and methods of production; and
- Establish criteria and information aimed at enabling existing agri-business to expand their operations.

The initiative incorporates a variety of projects including the following:

- Agriculture Directional Signage;
- Point-of-Purchase Materials;
- Joint Venture program;
- Food shows and expositions;
- Farm City exhibits;
- Apple Marketing project;
- Farmers Markets;
- Fruit and Vegetable Quality Assurance;
- Corporate and Restaurants promotions;
- Agricultural commodity;
- Quality Seals;
- Publications and Media relations; and
- Community Gardens.

- **Illinois Product**

Since 1987, the Illinois Department of Agriculture's (IDOA) *Illinois Products* Logo Program has identified Illinois products in retail establishments. The registered trademark is available to any Illinois food or agribusiness-related company located in the state. There are over 470 food and

agribusiness companies utilizing the *Illinois products* logo in an effort to enhance customer awareness.

There is no cost to using the logo. Although there are no requirements to use a certain percentage of state-produced ingredients, the IDOA encourages the use of in-state resources. The Bureau of Marketing and Promotion supports the marketing efforts with a variety of educational and promotional projects including retail displays, food service, special events, industry trade shows, and state fair exhibits. The ILLINOIS PRODUCT logo can be used by:

- Food Companies;
- Agricultural Organizations;
- Fruit and Vegetable Growers;
- Christmas tree growers;
- Seed, Fertilizer Companies;
- Agricultural Equipment Manufacturers;
- Agricultural producers; and
- Agribusiness Companies

### **C. IMPACT OF BRANDING ON THE DEMAND FOR AGRI-FOOD PRODUCTS**

There is empirical evidence that branding does affect the demand for food products. More research has been done on commodity promotion such as the Washington Apple campaigns but there has been some work on the effectiveness of state branding initiatives.

For example, consumers of *Jersey Fresh* tomatoes were found to be less price-sensitive and purchased more of these products as their income rose. The state calculated that the Jersey Fresh program provided \$32 in return to growers for every \$1 invested in the program.<sup>1</sup> The New Jersey study questioned consumers about their opinion of New Jersey products. The responses indicated that:

- the majority of consumers (96%) reported that they would find Jersey Fresh logos useful in identifying and selecting New Jersey produce;
- the majority of the consumers (64%) indicated that they would like to buy more state produce;
- a high percentage of consumers were likely to increase their purchases if they saw the logos on the produce;
- a majority (79%) indicated that they would occasionally consider changing their usual supermarket in order to be able to purchase Jersey Fresh produce;
- Over 87% also said they would prefer the grocery store in their local area to have a greater selection of Jersey Fresh produce;
- 75% of the participants were willing to pay a premium to purchase Jersey Fresh produce; and
- 47% indicated that they would consider paying between 1% to 5% over the market price.<sup>2</sup>

<sup>1</sup> <http://www.choicesmagazine.org/2006-1/grabbag/2006-1-08.htm>

<sup>2</sup> <http://www.joe.org/joe/1999june/rb2.html>

A 2005 study on the states of Vermont, New Hampshire and Maine indicated that size of the premium consumers were willing to pay depended on price and origin. Most studies indicated that given a choice consumers would prefer to buy local produce which they expect to be fresher and/or of higher quality.

A study of Arizona products (*Arizona Grown*) discovered that tourists were willing to pay a premium for unique state-branded food products that would enhance their travel experience. This suggests new opportunities to link branded product to tourism. In this study, it appeared that tourists value information on the local origin of their meal menu selections.

Pilot projects in Iowa have indicated that chefs and food service managers are willing to purchase local food items over lower-priced imported food due to considerations of quality, taste, and local community considerations.

The Leopold Center for Sustainable Agriculture in Iowa did an extensive survey of consumers in a study called “Consumer Perceptions of Place-based Foods, Food Chain Profit Distribution, and Family Farms”. The results of this survey were as follows:

- Respondents are more likely to choose a local food product that offers clear economic benefits to the farmers who grew the product and the community that supported the farmer than a food product that does not deliver significant economic benefits to the local economy;
- A majority of respondents would like to see farmers receive a higher share of the profits for retail food products relative to other partners in the food chain (processors, distributors, and retailers);
- A majority of respondents believed it be at least somewhat likely that the taste and quality of meat, produce, and dairy products are influenced by the natural resource characteristics of the region where the products were grown;
- Respondents are more likely to pay amounts above the conventional price for place-based food products grown in their state than for those place-based food products grown outside of their state; and
- Respondents were most likely to view family farms as those where family members provided labor and made management decisions, farms whose revenue was a primary source of income, and farms that used conservation practices.

A 2001 Evaluation of the “Grown in Georgia” promotion program<sup>3</sup> found the following:

- 94% of shoppers would purchase local product if it was of similar price and quality;
- a significant number of shoppers would switch stores to purchase local produce;
- 61% said in store displays influenced their purchase decisions; and
- Every \$1 spent on the program generated an additional \$3.37 in revenue.

A 2006 poll for the “Pride of Dakota” program, conducted by the Bureau of Governmental Affairs at the University of North Dakota with consumers in the state of North Dakota, found that:

- 79% of people would be more likely to purchase a product if produced locally;
- 52% of people are willing to pay a premium from 1 to 10% for local food;

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<sup>3</sup> Kent Wolfe and John McKissick, University of Georgia, “An Evaluation of the Grown in Georgia Promotion”.

- 14% are willing to pay a premium from 11 to 20%;
- 4% would pay more than 20%; and
- 28% would not pay a premium.

Other local branding campaign results include:

- A Kansas City campaign has tracked a 36% increase in local food sales for the Good Natured Family Farmers Cooperative selling through a group of locally owned and operated supermarkets in the Kansas City metro area since 2004;
- A Northeast Iowa campaign has doubled local food purchases among twenty three institutional buyers, including hospitals, retirement homes, restaurants, grocers, and colleges;
- A Maine study indicates that shifting just 1% of consumer expenditures to direct purchasing of local food products could increase farmers' income in that state by as much as 5%; and
- The “Go Texas” campaign analysis indicated that the program had a positive impact on 77% of member businesses.

A 2005 report by Ipsos Reid “What Do Customers Really Want” had results that would be useful to consider when designing a branding project in BC. The relevant results included the following:

- health and safety have become major themes for consumers;
- the media is the primary source of information for food safety for Canadian consumers;
- quality, nutrition and price are the top three concerns when eating out or at home;
- quality means freshness, nutritious and safe; and
- 92% of consumers think food made in Canada is of higher quality than imported food.

## **D. BEST PRACTICES IN BRANDING**

There is a significant body of literature that discusses the best way to design, implement and maintain a brand for products and organizations. The main theme is that successful branding identifies the value being offered, creates a brand that communicates this message and then markets and maintains that brand. The majority of the literature in this area relates to corporations but the principles are similar to regional branding.

*“The road to branding success requires a unique discernment of the value proposition being offered followed by vision, patience and perseverance. By combining these characteristics and method of execution, great organizations (i.e. Brands) emerge from the landscape of mediocrity.”<sup>4</sup>*

The maintenance of the brand’s effectiveness is often emphasized in the literature. “But branding - the process through which a cohesive, enduring impression of a business, product or service is formed in the minds of your audience members - never ends”<sup>5</sup>

One key appears to be the act of differentiating the product from other similar offerings to make it distinctive. There are many components of this strategy. These include the following.

<sup>4</sup> Bill Nissan, <http://allaboutbranding.com/index.lasso?article=395>

<sup>5</sup> <http://allaboutbranding.com/index.lasso?article=428>

- Key messages. The focus should be on a limited number of messages to enable the audience to retain this key information.
- Position Concept. The main message should be simplified to claim a single unique quality, attribute or benefit.
- Brand Promise. This should identify what benefit the customer can expect from the branded product.
- Personality. Some writers believe the brand should indicate human qualities that will allow the customer to identify with the product on an emotional level.
- Competitive Differentiation. These are the unique benefits that set the product apart from the competition.

The Venture Republic publication has identified some crucial steps to successful branding.<sup>6</sup> These are:

- The head of the organization has to lead and be involved in the strategy;
- There is no cookie cutter approach and the branding model must be modified to reflect the specific requirements of the product;
- Use information gathered from stakeholders including customers;
- Use modern technology to promote the brand such as a stylish website;
- Train employees to be brand ambassadors;
- Market the brand with a consistent and easily understood message; and
- Measure the brand performance and make adjustments as necessary.

Another study by the American Productivity and Quality Center (APQC) and the American Marketing Association (AMA) indicates similar best practices principles.<sup>7</sup> These include:

- Best practice organizations focus on a few key brands;
- Senior management plays an active role;
- Best practice organizations use a brand holistically (branders should do research into the attitudes and perceptions of customers and prospects but also of their employees);
- Top branding organizations have their own process to measure and monitor brand value or equity;
- Best practice organizations use all the means available to promote the brand;
- Successful promotional programs of any kind need clear targets and regular feedback on progress; and
- Great brands are based on quality products and services that are promoted consistently for a long time.

Two branding experts Duane Knapp and Tryg Jacobson are quoted extensively in a TEC article regarding branding best practices.<sup>8</sup> According to Knapp, a "brand blueprint" consists of five basic components:

- A brand name that is unique, memorable, distinctive;
- An icon, symbol or image that vividly expresses your brand's identity;
- A byline that tells consumers where to place your brand in their mind's eye and that always appears with the brand (e.g. Whirlpool Home Appliances);
- A tagline message that expresses your product's functional and emotional benefits; and

6 [http://www.venturerepublic.com/resources/10\\_steps\\_to\\_successful\\_Corporate\\_Branding.asp](http://www.venturerepublic.com/resources/10_steps_to_successful_Corporate_Branding.asp)

7 <http://www.bisonline-content.com/BizResourceOnline/harris/displayarticle.asp?id=16&clientid=4&categoryid=1>

8 <http://www.teconline.com/www/bestpractices/branding.asp>

- A brand story to identify your brand, and communicate and preserve its heritage.

Jacobson identifies "four pillars" of branding:

- Differentiation. To create a brand, you have to set yourself apart from everyone else in the market.
- Relevance. Relevance has to do with appropriateness, meaningfulness and, ultimately, the value of your point of difference. If your product or service isn't relevant, your point of difference won't attract customers or keep them.
- Esteem. When you succeed at building relevant differentiation, customers respond with high esteem for your product or service. Brand esteem can maintain high levels even after a brand has lost its point of difference (e.g., luxury and prestige brands).
- Understanding. This refers to how well customers understand and believe in your point of differentiation. Understanding also represents an important diagnostic indicator of brand health. For example, when customer esteem for a brand falls below understanding, it means that people know you but they don't like you. If they don't like you, they won't buy your product.

Again according to Jacobson, strategies differ in tactics from industry to industry. A brand usually develops along the following lines:

- Identify the message. A company defines a core message by identifying the distinctive value of its products and services -- why its customers care about what it has to offer and what makes it different from its competitors.
- Build the message. When the distinctive value is identified, it must be framed in a succinct message people can understand and relate to. This will reinforce the core value of the products and services.
- Promote the message. What good is a message if no one hears it? The company must make a strong pledge to aggressively market its product and, over time, to solidify its image (and its associations of quality) in the minds of consumers. "Determine what you do that your competitors don't," Knapp says, "and hit that theme hard--again and again. Find the line, the phrase, the image that defines your company and use it."
- "Be" the message. The message is chosen, marketing and advertising campaigns are busy promoting it -- but how well is the entire organization living it? Is there a direct connection between the brand message and the customer's experiences when they walk in the door and purchase your product?