



# Marketing and Branding for Small Dairy Processors in the Northeast U.S.

## Project Final Report

June 29, 2022

the  
**goodpeople**research  
company™

NORTHEAST DAIRY BUSINESS  
INNOVATION CENTER

# Table of Contents

<b>Introduction .....</b>	<b>1</b>
<b>The Research .....</b>	<b>1</b>
<b>Dairy Processors .....</b>	<b>1</b>
Search, review, and evaluation .....	1
Survey .....	5
Interviews .....	14
<b>Consumers .....</b>	<b>14</b>
Survey .....	14
<b>Analysis, Conclusions and Recommendations .....</b>	<b>25</b>
<b>Analysis .....</b>	<b>25</b>
<b>Conclusions .....</b>	<b>25</b>
Authenticity sells .....	25
There are three different types of brand stories NE dairies tell .....	26
<b>Recommendations .....</b>	<b>28</b>
<b>Action and Work Product: Case Studies and a Marketing/Branding Toolkit .....</b>	<b>29</b>
12 Case Studies .....	29
Marketing and Branding Toolkit .....	31
<b>Appendix .....</b>	<b>33</b>
<b>Case Studies .....</b>	<b>33</b>
<b>Marketing and Branding Toolkit .....</b>	<b>80</b>

## Tables

Table 1: Processor survey: size of respondent company staff.....	6
Table 2: Processor survey: dedicated marketing personnel in respondent company .....	6
Table 3: Processor survey: generational ownership of respondent company .....	7
Table 4: Processor survey: items produced by respondent company.....	7
Table 5: Processor survey: correlation table of marketing/branding element assessments of respondent companies .....	8
Table 6: Processor survey: concepts intentionally advanced in marketing/branding by respondent companies.....	9
Table 7: Processor survey: description of company logo by respondent companies .....	10
Table 8: Processor survey: sales channels used by respondent companies.....	11
Table 9: Processor survey: promotion channels used by respondent companies .....	12
Table 10: Processor survey: agritourism activities used by respondent companies.....	13
Table 11: Processor survey: delineation of when professionals are used by respondent companies for branding activities .....	13
Table 12: Consumer survey: consumer report on frequency of dairy product usage.....	15
Table 13: Consumer survey: consumer report of dairy purchasing responsibility in household .....	15
Table 14: Consumer survey: consumer priorities when shopping for dairy products .....	18
Table 15: Consumer survey: comparison of consumer purchasing priorities with dairy processor marketing priorities .....	19
Table 16: Consumer survey: consumer expectation of packaging imagery .....	19
Table 17: Consumer survey: Importance of branding elements when purchasing dairy products, by age category (mean scores).....	22
Table 18: Consumer survey: importance of branding elements when purchasing dairy products (importance categories), by age category .....	23
Table 19: Consumer survey: report of where they typically buy dairy products, by age category .....	24
Table 20: summary of three emergent brand stories told by northeast dairy processors .....	27
Table 21: listing of case studies.....	31

## Figures

Figure 1: Consumer survey: age breakdown of sample used for analysis (n=750) .....	15
Figure 2: Consumer survey: consumer report on level of discernment when purchasing dairy products .....	16
Figure 3: Consumer survey: consumer report on where they typically purchase dairy products .....	17
Figure 4: Consumer survey: consumer rating of importance of buying from local dairy when purchasing from select retail venues.....	20
Figure 5: Consumer survey: consumer rating of importance of the producer's brand story when purchasing from select retail venues .....	21
Figure 6: The brand life cycle in marketplaces.....	29
Figure 7: Brand lifecycle in marketplace .....	31

## Introduction

Visitors to the northeast U.S. know that the landscape is punctuated by dairy producers that offer something for all fans; the foodie on an artisanal cheese safari to the family that visits the same ice cream stand every summer for generations. While the northeast draws tourists from all over to its famous countryside, the region's dairy producers must work hard to grow and popularize their brands while focusing on the demands of their craft.

Smaller dairy processors perhaps have the greatest challenges when it comes to building a brand as they typically lack a dedicated marketing professional or team. At most small dairy processors, the owner/proprietor is likely also the head of marketing, or possibly a staff member can devote part of the week to posting photos to Facebook and Instagram and respond to customer posts. There's little time to learn about different marketing and branding approaches, much less execute them consistently.

As part of a larger effort sponsored by the Northeast Dairy Business Innovation Center (NE-DBIC) and the Vermont Agency of Agriculture Food and Markets (VAAF), The Good People Research Company was contracted to study the marketing and branding of dairy producers and consumers in the northeast to learn how best to assist small dairy producers in their efforts to brand their companies successfully. The study commenced on July 1, 2021, and culminated in the following deliverables in June 2022:

1. 12 case studies illustrating branding strategies that successfully align with the business goals of select northeast dairy producers.
2. A processor-focused marketing and branding toolkit.
3. A final report and presentation describing the study's activities and results.

## The Research

The research conducted for this project proceeded across two overlapping phases: 1) an examination of dairies and how they marketed and branded themselves in different ways; and 2) a survey of consumers to learn how different consumers might purchase dairy products and perceive various aspect of how dairy producers brand themselves and their products.

### Dairy Processors

#### *Search, review, and evaluation*

To produce the 12 case studies for the project, we curated a list of 135 dairy processors located in the 10 states of the northeast U.S. whose presence was detectable through an ordinary online consumer search of retail stores and search engines with a focus on the region; our staff assumed the role of consumers searching for dairy products produced in the northeast or attainable in the northeast from local retail locations, whether they be a grocery store, farmers market, online store, or farm store.

The following companies were the ones we initially gathered, examined, and evaluate:

- A.B. Munroe Dairy
- Animal Farm
- Arethusa Farm
- Arruda's Dairy
- Art Cream
- Backroad Creamery
- Balfour Farm
- Barn First Creamery
- Barts Ice cream
- batch ice cream
- Battenkill Valley Creamery
- Beckon Ice Cream
- Ben & Jerry's Ice Cream
- Berway Farm Creamery
- Birchrun Hills Farm
- Blue Ledge Farm
- Boice Bros. Dairy
- Boston Post Dairy
- Brighams Ice Cream®
- Brovetto's Dairy Farm
- Brunton Dairy
- Butterworks Farm
- Byrne Dairy
- Cabot Cheese
- Canty Cow Creamery
- Caputo Brothers Creamery
- Casco Bay Creamery family dairy farms
- Cato Corner Farm
- Coach Farm
- Cobb Hill Cheese
- Cochran Farm 1790
- Cold Fusion Gelato
- conebellafarm.com
- Consider Bardwell Farm
- Copper Tail Farm
- Cowbella
- Cream O Land
- Crescent Ridge Dairy
- Cricket Creek Farm
- Crooked Face Creamery
- Cumberland Dairy
- EcoMeal Organic
- Eden Valley Creamery
- Elmhurst Dairy Farms, LLC
- Farmland Fresh Dairies
- Five Acre Farms
- Fuzzy Udder Creamery
- Galliker's Dairy
- Gelato Fiasco
- Gifford's Ice Cream
- Goot Essa Cheese
- Grafton Village Cheese

- Great Hill Dairy
- Green Mountain Creamery
- Guida's Dairy
- Hatchland Farm
- Highlawn Farm - Milk & Cream
- Hillandale
- Highland Farm
- Homestead Creamery
- HP Hood
- Houlton Farms Dairy
- Ronnybrook Farm
- Ithaca Milk
- Jasper Hill Farm
- Kate's Homemade Butter
- Kingdom Creamery of Vermont
- Lewes Dairy
- Lively Run Dairy
- M.A.D. Foods
- Mad Minis
- Manning Hill Farm
- Maple Hill Creamery
- Maple Valley Creamery
- Maplebrook Farm
- Marburger Dairy
- McCadam Cheese
- McNamara Dairy
- Midland Farms
- Millborne Farm
- Molly Brook Farm
- Monument Farms Vermont Dairy
- Mountain Dairy
- Mountainside Farms
- Narragansett Creamery
- Nellie's Free Range
- Nettle Meadow Farm and Artisan Cheese
- Oak Knoll Dairy
- Oak Tree Dairy
- Oakhurst Dairy
- Old Chatham Creamery - Our Story
- Ovinshire Farm - Home
- Patches Family Creamery
- Perry's Ice Cream
- Pineland Farms Dairy
- Pittsford Farms Dairy & Bakery
- Pleasant Lane Farms
- RG Cheesemakers
- Ritchey's Dairy
- Rosenbergers Home
- Schneiders Supreme Dairy
- Seal Cove Farm Maine Goat Cheese
- Seven Stars Farm - Home
- Shaw Farm
- Slate Milk
- Smiling Hill Farm Products
- SoCo Creamery

- Sommer Maid Creamery
- Spring Brook Farm Cheese
- St. Albans
- Stoltzfus Family Dairy
- Stonyfield Organic Yogurt
- Strafford Organic Creamery
- Sunflower Farm Creamery
- Sunrise Family Farms
- Sunrise Farms
- Swallowtail Farm and Creamery
- Sweet Scoops
- The Farmers Cow
- The Grey Barn
- The Milkhouse - Dairy
- Thistle Hill Farm
- Trempherbe Cheeses
- Tricking Springs Organic
- Turner Dairy Farms
- Turning Page Farm
- Upstate Farms
- Vale Wood Farms
- Van Leeuwen Ice Cream
- Vermont Creamery
- Vermont Farmstead Cheese
- Von Trapp Farmstead
- Walpole Creamery
- Westfield Farm
- Yancey's Fancy

We distilled the list of companies down to 50, using a coding system that evaluated the processor on three levels:

1. Size – we used the apparent geographic reach as well as information from the processors’ web sites as a proxy for size.
2. Effectiveness of branding and presentation – we reviewed the company’s presentation for clarity and consistency, as well how compelling the storytelling was.
3. The company’s apparent positioning (i.e., aspiration for their brand) – we evaluated whether the company appeared to be attempting to be a specialty product made in small batches, a supplier of staple products to a local audience, or a brand recognized and positioned to grow well beyond the region.

The 50:

- A.B. Munroe Dairy
- Arethusa Farm
- Batch Ice Cream
- Beckon Ice Cream
- Ben & Jerry's Ice Cream
- Blue Ledge Farm
- Cabot Cheese
- Casco Bay Creamery
- Cold Fusion Gelato
- Consider Bardwell Farm
- Crescent Ridge Dairy

- Crooked Face Creamery
- Farmland Fresh Dairies
- Five Acre Farms
- Byrne Dairy
- Galliker's Dairy
- Gelato Fiasco
- Gifford's Ice Cream
- Grafton Village Cheese
- Green Mountain Creamery
- Guida's Dairy
- Highlawn Farm
- HP Hood
- Ithaca Milk
- Jasper Hill Farm
- Mad Minis
- Maple Hill Creamery
- Marburger Dairy
- McCadam Cheese
- Nellie's Free Range
- Oakhurst Dairy
- Perry's Ice Cream
- Ritchey's Dairy
- Ronnybrook Farm
- Schneiders Supreme Dairy
- Shaw Farm
- Slate Milk
- Smiling Hill Farm Products
- Stonyfield Organic Yogurt
- Sunflower Farm Creamery
- Sunrise Family Farms
- Sweet Scoops
- The Farmers Cow
- Trickling Springs Organic
- Turner Dairy Farms
- Upstate Farms
- Van Leeuwen Ice Cream
- Vermont Creamery
- Yancey's Fancy

### *Survey*

We then surveyed these 50 companies to learn more about them and their approach to marketing and branding and 23 companies responded. In addition to the 50 companies, we had on our list, we opened the survey to companies who responded to an invitation posted in NE-DBIC's newsletter.

The 23 respondents:

- Arethusa Farm Dairy
- Bearded Ladies Goat Farm
- Blue Ledge Farm
- Cabot Creamery Co-operative



- Consider Bardwell Farm
- Crescent Ridge Dairy
- Crooked Mile Cheese
- Galliker's
- Gelato Fiasco
- Guida's Dairy
- Marburger Farm Dairy
- Monument Farms, Inc.
- Oake Knoll
- Ronnybrook Farm Dairy
- Schneider's Dairy
- Shaw farm
- Smiling Hill Farm and Silvery Moon Creamery
- South Mountain Creamery, LLC
- The Farmers Cow
- Turner Dairy Farms
- Upstate Niagara Cooperative, Inc.
- Vale Wood Farms
- Whippoorwill Dairy Farms

The composition of the sample companies that did respond is summarized below:

*Table 1: Processor survey: size of respondent company staff*

Which of the following best describes the size of your dairy processing business?	Micro - just the founders and a few helpers	13%
	Small - staff, but fewer than 50	46%
	Mid-Sized, staff between 50 - 199	17%
	Large, staff 200+	17%
	Very Large -- (part of a large corporation or conglomerate)	8%

*Table 2: Processor survey: dedicated marketing personnel in respondent company*

How many people in your company are primarily dedicated (mostly full-time) to marketing?	0	21%
	1	33%
	2	25%
	3	8%
	4	4%
	5	0%
	More than 5	8%

Table 3: Processor survey: generational ownership of respondent company

Do you consider your dairy processing business to be a "family-owned" business?	Yes, 3+ generations	58%
	Yes, 1-2 generations	21%
	No	21%

Table 4: Processor survey: items produced by respondent company

Products Made	Milk	67%
	Ice Cream	50%
	Cheese	38%
	Other	38%
	Butter	33%
	Yogurt	33%

Some interesting findings emerged from the survey that guided our direction when we continued to explore the nature of marketing and branding across dairy producers:

**1. When asked to rate how much effort they put into various aspects of their company's marketing, they indicate they had put considerable thought into them.**

- On a scale of 1-10, with "1" being "None at all" and "10" being "A significant amount," how would you rate the level of thought you have put into **the logo you've chosen to represent your company?**
  - **Mean = 8.46**
- On a scale of 1-10, with "1" being "None at all" and "10" being "A significant amount," how would you rate the level of thought you have put into **the way you tell the story about your company?**
  - **Mean = 8.50**
- On a scale of 1-10, with "1" being "None at all" and "10" being "A significant amount," how would you rate the level of thought you have put into **how you promote your company to the public (e.g., advertising, social media, events)?**
  - **Mean = 7.79**
- On a scale of 1-10, with "1" being "None at all" and "10" being "A significant amount," how would you rate the **level of success you have had with the current way you're marketing your farm/company?**
  - **Mean = 7.33**

So, while respondents on average indicated that that put a considerable amount of time into their logo design, storytelling, and promotion, they felt less strongly that they had success overall with their marketing.

What is even more interesting, however, is that tests indicate no correlation between the thought they put into their logo design and the level of success they had with marketing, but very high and significant correlation with the thought they put into the *story* they tell and into how they *promote* their company. While we caution that because of the small sample and the inability to reach a random sample of dairy processors for our survey we don't assert that this finding can characterize the beliefs of the universe of northeast dairy processors, we nevertheless found this development interesting and, possibly, instructive. It might suggest that overall, the actual logo design is not as connected to marketing success as one might think, at least in the minds of our respondents.

Table 5: Processor survey: correlation table of marketing/branding element assessments of respondent companies

Correlations					
		Logo	Story	Promote	Success
Success	Pearson Correlation	0.284	.696**	.805**	1
	Sig. (2-tailed)	0.178	0	0	
	N	24	24	24	24
**. Correlation is significant at the 0.01 level (2-tailed).					

2. We also found that when it comes to intentionally communicating concepts about the company and its products, 71% of survey respondents emphasize the quality, purity, and taste of their products, while 67% emphasize how they support the community, and 58% take care of their animals, are small family farms, and facilitate local farm to table eating.

Table 6: Processor survey: concepts intentionally advanced in marketing/branding by respondent companies

Concepts intentionally used in marketing	Highest quality/pure	71%
	Better tasting/delicious	71%
	We support the local community	67%
	We take good care of our cows/goats/sheep	58%
	Small family farm	58%
	Local farm to table	58%
	Generations of farmers	54%
	Freshness	54%
	No antibiotics/rBGH/additives	54%
	Simple ingredients	50%
	Nutritious	50%
	We take good care of the land	50%
	Our family to your family	46%
	Local flavor or character	42%
	Trusted neighbor	38%

3. When it comes to words or phrases respondents use to describe their logos, respondents tend toward the conservative side, with *clean*, *simple*, *traditional*, and *old-fashioned* leading the list.

Table 7: Processor survey: description of company logo by respondent companies

Character of Logo	Clean	43%
	Simple	39%
	Traditional	35%
	Old-fashioned	30%
	Classy	30%
	Fun	26%
	Friendly	22%
	Realistic	17%
	Vintage	17%
	Modern	17%
	Cartoonish	13%
	Artistic	13%
	Humorous/funny	9%
	Artisan	9%
	Natural	9%
	Wholesome	9%
	Serious	4%
	Rustic	4%
	Boutique	4%
	Healthy	4%
Botanical/floral	0%	

4. Survey respondents indicate that as a group they tend primarily to sell direct to stores and restaurants, and a majority sell through their own farm store and distributors on some level. Selling nationally or even via home delivery with their own vehicles is far less common within the group.

Table 8: Processor survey: sales channels used by respondent companies

Sales Channels	Direct to local retail stores	88%
	Direct to local restaurants/hotels/institutions	79%
	A store on our farm	58%
	Via distributor to local stores, restaurants, etc.	58%
	Via distributor to state-wide stores, restaurants, etc.	58%
	Via distributor to regional stores, restaurants, etc.	54%
	Direct to retail stores in my state	50%
	Ecommerce on our website	42%
	Direct to retail stores in the northeast	42%
	A store on someone else's farm	29%
	Ecommerce through another independently owned web site	21%
	Direct at local farmers markets	21%
	Our own store in a retail location	21%
	Via distributor to national stores, restaurants, etc.	21%
	Online at a large retail website (e.g., Amazon)	13%
	Home delivery using our own vehicles	13%
	Direct to stores nationally	8%

- Using Facebook and a website is nearly ubiquitous among respondents as a means of promoting their brands, with 79% reporting they use Instagram. Far fewer indicate that actively use video sites like YouTube.

Table 9: Processor survey: promotion channels used by respondent companies

Promotion Channels	Facebook	100%
	Website	92%
	Instagram	79%
	Sponsorship of local organizations	54%
	Enter products into food awards competition	54%
	Twitter	46%
	Ads in online newspapers, magazines, or blogs	42%
	Booth at food expose or trade shows	42%
	Online ads in search engines	38%
	Print ads in newspapers or magazines	38%
	Booths at community events/festivals	33%
	Online banner ads on other websites	25%
	YouTube	17%
	Other	17%
	Pinterest	8%
	Vimeo	0%

6. The primary *agritourism* involvement respondents report is through their own farm store. 38% report they offer tours of their processing facility.

Table 10: Processor survey: agritourism activities used by respondent companies

Agritourism	We have a store on a farm	71%
	Offer tours of our processing facility	38%
	We are part of a "farm/dairy trail" type offering	29%
	We have a dedicated tasting opportunity on site	19%
	We have lodging for guests (e.g., Bed & Breakfast)	14%
	We have guests participate in processing products	5%

7. When it comes to engaging professionals to assist with select marketing and branding tasks, respondents appear to employ professionals mainly for website and logo design, with a majority indicating they also use professionals for packaging design. Other tasks, if they engage in them at all, respondents appear to perform in house. A key consideration in understanding this pattern is that larger companies have the capacity to have dedicated marketing staff in-house while small companies may get by with less skilled efforts if they can't afford either an in-house staff or an outside professional.

Table 11: Processor survey: delineation of when professionals are used by respondent companies for branding activities

	Use a professional	We do ourselves	N/A - don't do at all
Website Design	75%	21%	4%
Logo Design	65%	35%	0%
Packaging Design	58%	42%	0%
Website upkeep/maintenance	33%	63%	4%
Search Engine Optimization (SEO)	27%	36%	36%
Social media posts/campaigns	21%	79%	0%
Advertising	17%	75%	8%
Booths at food shows	0%	74%	26%
Booths at farmers markets	0%	43%	57%



## Interviews

On the survey, we invited respondents to indicate if they would be open to an interview. Most of the survey respondents responded positively to the invitation. The following were ultimately available for interviews, and they were conducted online via the Zoom videoconferencing platform:

- Greg Bernhardt - Owner/operator, Blue Ledge Farm, Salisbury VT
- Russell Glover, Owner, Consider Bardwell Farm, West Pawlet, VT
- Dorothy Grimm – Cheesemaker, Silvery Moon Creamery, Westbrook, ME
- Terri Lawton – Owner, Oake Knoll Farms, Foxborough, MA
- Robert McCarthy, Director of Marketing, Crescent Ridge Dairy, Sharon, MA
- Hannah Sessions – Owner/operator, Blue Ledge Farm, Salisbury VT
- Warren Shaw, Owner/operator, Shaw Farm, Dracut, MA
- Steve Turner – Marketing Director, Turner Dairy Farm, Penn Hills, PA

Across the 23 companies represented by respondents to the survey, we looked for diversity in size, types of products, and geographic location, as well as differences in the mix of branding efforts (e.g., use of video, detailed storytelling, timelines, etc.) and narrowed our list to 14 companies, with the goal of completing case studies for 12 of the 14. In a couple of cases, we selected companies to explore that were on our list of 50 but did not respond to our survey. In these cases, we analyze their branding efforts independent of details they might report about their marketing operations.

Ultimately, the case studies presented in this report are ones we feel are examples of marketing and branding that characterize the different approaches found across dairies in the northeast, and that offer a variety of approaches from which to learn. Within the case studies we point out how the themes we discovered during our review are played out in different forms across the examples provided.

## Consumers

### Survey

In June 2022, we surveyed 750<sup>1</sup> adult consumers (18+) about their dairy buying habits, their perceptions of everyday dairy brand marketing efforts, and the personal preferences they reference when evaluating a dairy brand for purchase. We used a professional market research panel management company to source respondents.

The consumer survey was designed to discern any patterns in consumer behavior and/or sentiment that might guide dairy processors in their effort to connect and engage positively with customers.

The characteristics of the sample are summarized as follows:

- 50% under 45, 50% over 45
- 75% consume dairy at least regularly
- 96% have some responsibility for purchasing
- 73% live with others

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<sup>1</sup> We received more than 800 completed surveys. After cleaning the data file for errant or less useable records, we arrived at 750 records for analysis.

Below are select findings from the consumer survey:

1. Respondents to the consumer survey are evenly distributed with approximately 50% reporting they are under 45 and 50% reporting they are age 45+.

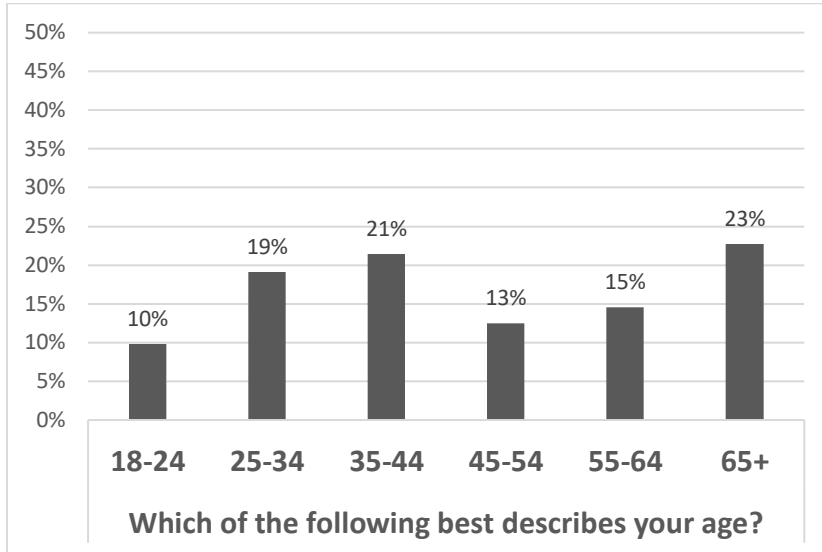


Figure 1: Consumer survey: age breakdown of sample used for analysis (n=750)

2. Respondents report they are active dairy consumers.

Table 12: Consumer survey: consumer report on frequency of dairy product usage

I consume dairy products from time to time	24%
I consume dairy products regularly	68%
I go out of my way to have dairy products as much as I can	7%

3. Respondents report they are decision makers with respect to buying dairy products.

Table 13: Consumer survey: consumer report of dairy purchasing responsibility in household

I am the primary one who decides which dairy products to buy	68%
I share responsibility for deciding which dairy products to buy	28%
Someone else in decides which dairy products to buy	4%

4. 82% of respondents report they are at least a little discerning in choosing dairy products; 34% at least “pretty discerning.”

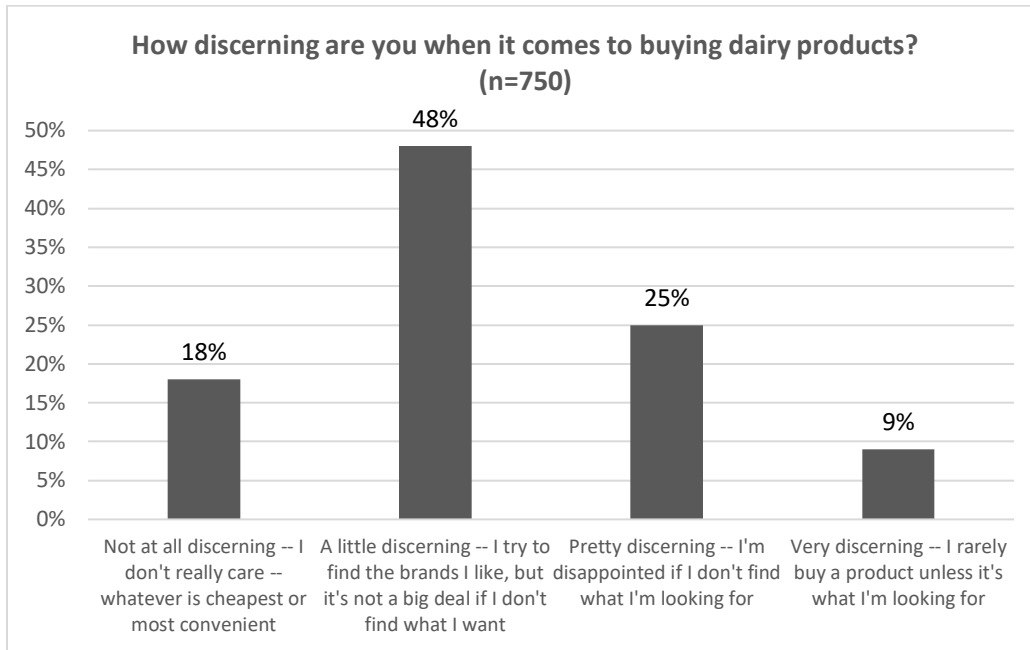


Figure 2: Consumer survey: consumer report on level of discernment when purchasing dairy products

5. 80% of respondents report they shop for dairy at chain grocery stores; 9% at farmers markets; 7% direct from dairies.

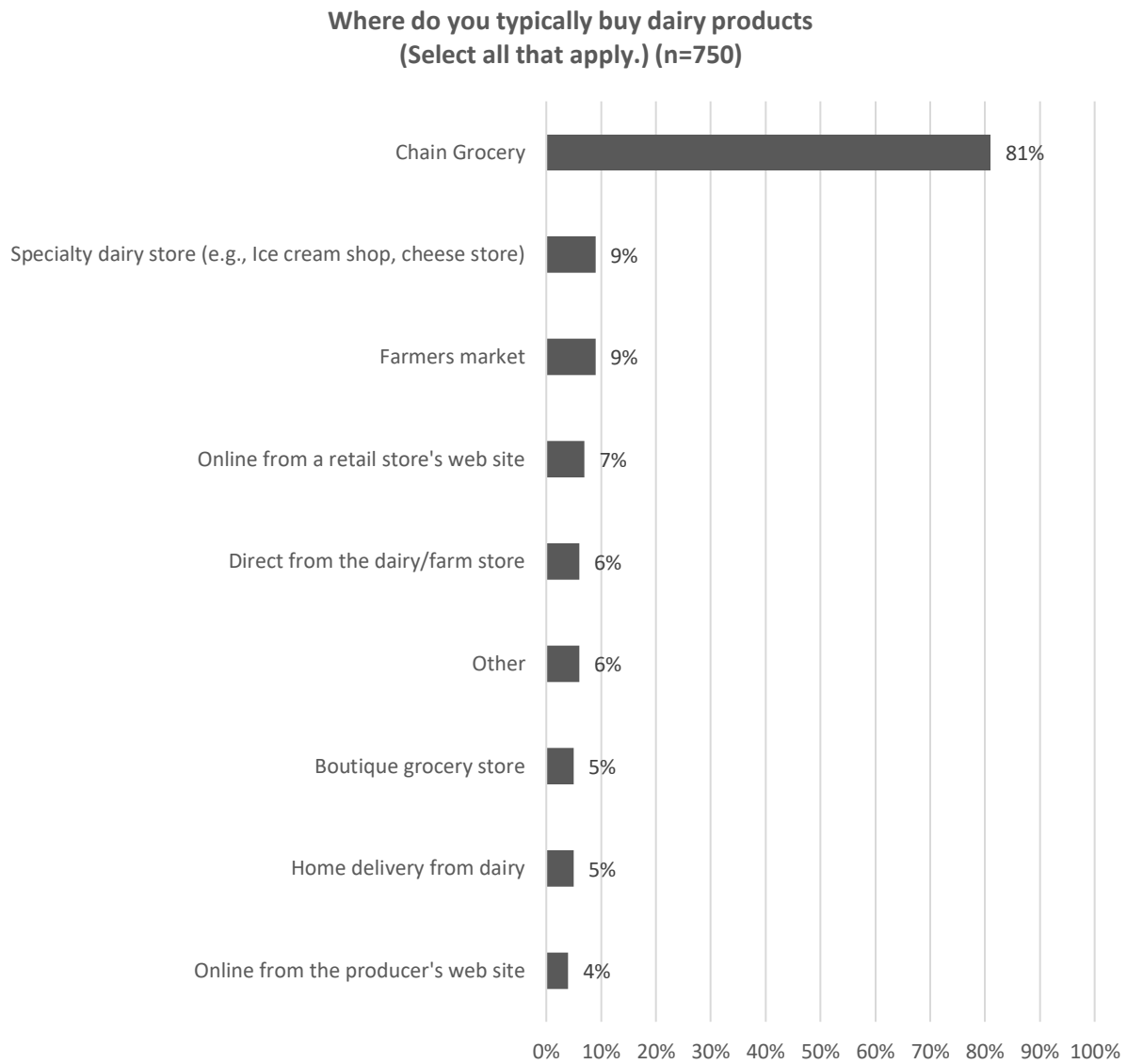


Figure 3: Consumer survey: consumer report on where they typically purchase dairy products

Below we present selected findings we determined may be highly relevant to how dairy processors in the northeast position their brands.

6. **Above all else when purchasing dairy products, respondents to the consumer survey report that they seek indications that the products are *fresh* and *pure*, have *simple ingredients*, and are *nutritious*.**

Table 14: Consumer survey: consumer priorities when shopping for dairy products

Concepts in branding	Freshness	54%
	Highest quality/pure	42%
	No antibiotics/rBGH/additives	40%
	Simple ingredients	40%
	Nutritious	39%
	We take good care of our cows/goats/sheep	34%
	Better tasting	31%
	Local farm to table	25%
	We support the local community	23%
	Our family to your family	22%
	Generations of farmers	21%
	We take good care of the land	21%
	Small family farm	20%
	Local flavor or character	13%
	Trusted neighbor	11%
	None of the Above	8%

7. When compared with the priorities our sample of dairy companies report they have in communicating in their marketing, we see some misalignment, with *highest quality/pure* as the only phrase that appears in each group's top five priorities.

Table 15: Consumer survey: comparison of consumer purchasing priorities with dairy processor marketing priorities

<u>Dairy Processor Top 5 Priorities in Marketing</u>	<u>Consumer Top 5 Priorities in Purchasing</u>
Highest quality/pure	Freshness
Better tasting/delicious	<b>Highest quality/pure</b>
We support the local community	No antibiotics/rBGH/additives
We take good care of our animals	Simple ingredients
Small family farm	Nutritious

Some of the discrepancy between the priorities expressed by the two groups may be because the company is marketing both itself (brand) and its products, while the consumer may be more focused on the products themselves.

8. Additionally, respondents to the consumer survey indicated simple expectations about what they would find on dairy product packaging, with *just words, dairy product, scenery, and cows* as the top four items they imagine they would see featured.

Table 16: Consumer survey: consumer expectation of packaging imagery

Expect on Package		
	Just words	54%
	Dairy product	49%
	Scenery	40%
	Cows	39%
	Farm buildings	25%
	People	12%
	Farm equipment or tools	10%
	Vintage items	8%
	Sheep or goats	7%

9. Perhaps most interesting and relevant to guiding small dairies in their marketing and branding is the observation that consumer respondents report they place greater importance on the *story* of the dairy and the fact that the dairy is *local* to them, the more direct or intimate the consumer is with the dairy; that is, consumer respondents who shop outside of a chain grocery store place greater importance on these factors than those who shop at chain grocery stores, and importance is asserted at a greater rate among groups that buy their items at *farmers markets*, *direct from the dairy*, and receive *home delivery* from the dairy, respectively. (See Figures 4 and 5 below.)

### Importance of being local - consumer (n=750)

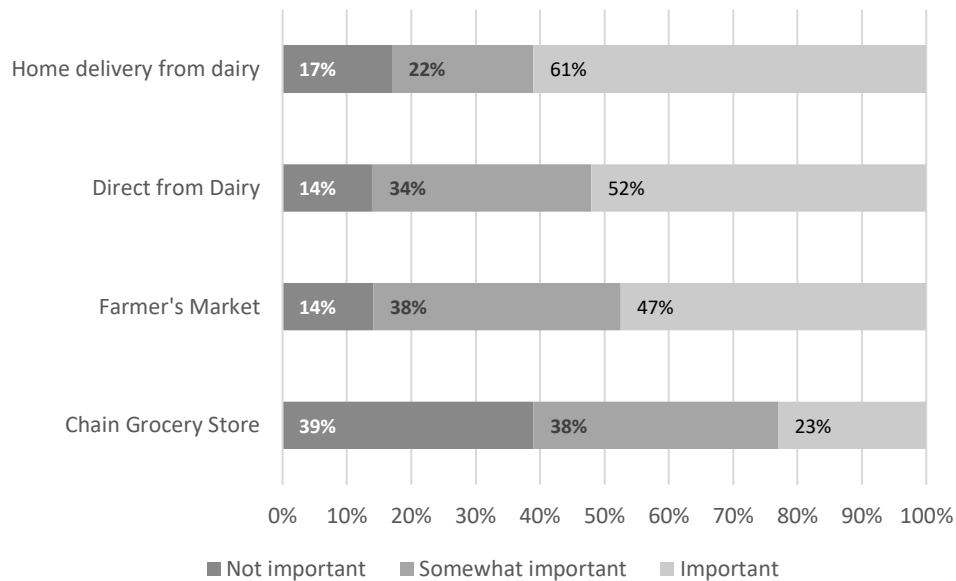


Figure 4: Consumer survey: consumer rating of importance of buying from local dairy when purchasing from select retail venues

## Importance of brand story – consumer (n=750)

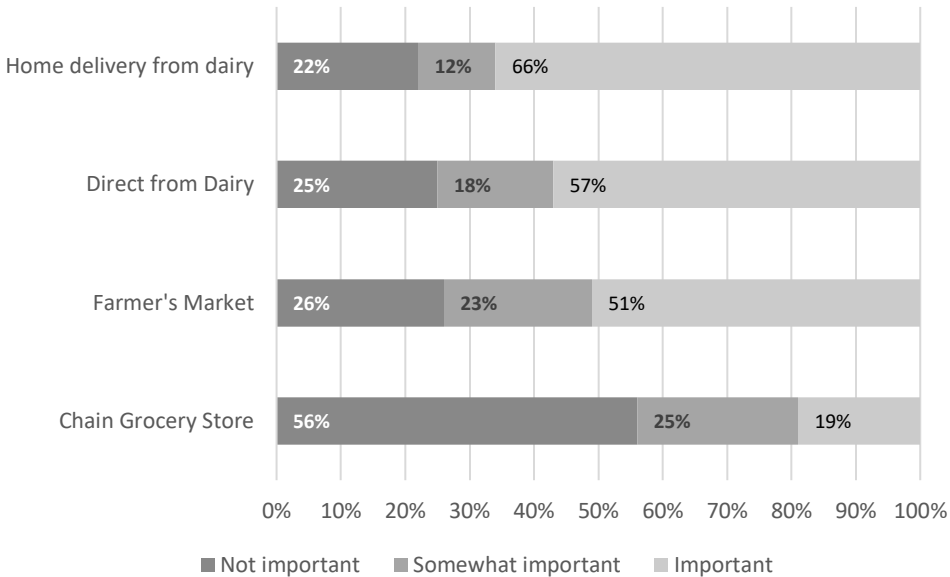


Figure 5: Consumer survey: consumer rating of importance of the producer’s brand story when purchasing from select retail venues

10. Below, Table 17 shows another interesting finding – that age is meaningful variable when considering how to best execute marketing for and position a dairy brand. The consumer survey asked respondents to rate the importance of select aspects of dairy product marketing/branding. Response options to the questions were presented as five-point scales, ranging from “1 = not at all important” to “5 = very important.”

Table 17 compares the mean scores of the five-point scale across age categories. The cells that are highlighted signify that these mean scores are higher to a statistically significant degree than are the ones attributed to scores in the columns designated by the letters beneath each score (the letters correspond to each letter serving as a label for each column in the table). We see from the table that younger consumer respondents value the branding elements presented in the survey significantly more than do respondents that fall into the older age categories.



Table 17: Consumer survey: Importance of branding elements when purchasing dairy products, by age category (mean scores)

	Importance of Branding Elements by Age Category					
	18-24	25-34	35-44	45-54	55-64	65+
	(A)	(B)	(C)	(D)	(E)	(F)
Importance of being local	2.95	3.05 F	2.84	2.82	2.80	2.60
Importance of package branding	2.95 C D E F	2.70 D E F	2.48 F	2.27	2.27	2.09
Importance of website branding	2.79 D E F	2.64 D E F	2.45 E F	2.12	2.05	1.84
Importance of website professionalism	2.75 E F	2.75 E F	2.62 F	2.36	2.21	2.02
Importance of brand story	3.05 D E F	2.74 D F	2.66 F	2.27	2.38	2.18

In Table 18, we see the same discovery a different way. The response option five-point scale assigned descriptors to each point: 1=not at all important; 2=Not very important; 3=somewhat important; 4=important; and 5=Very important. In the Table, we've collapsed *not at all important and not very important* into one category, *not important*. *Somewhat important* was left alone and we merged *important* with *very important* and labeled the new category *important*. The table then shows the proportion of respondents that fall into each cell.

We can see the same pattern in Table 18 as we did in Table 17; the younger respondent cohort places significant value on the quality of package and website branding, much more so than the older groups.

Table 18: Consumer survey: importance of branding elements when purchasing dairy products (importance categories), by age category

		Importance of Branding Elements by Age Category					
		18-24	25-34	35-44	45-54	55-64	65+
		(A)	(B)	(C)	(D)	(E)	(F)
Importance - Local	Not Important	36%	33%	40%	34%	37%	46%
	Somewhat Important	32%	34%	32%	44%	43%	37%
	Important	32%	34% F	28%	22%	20%	17%
Importance - Package Branding	Not Important	35%	48%	57% A	65% A	65% A B	71% A B
	Somewhat Important	36%	23%	22%	21%	24%	21%
	Important	30% E F	29% D E F	21% F	13%	10%	8%
Importance - Web Branding	Not Important	39%	52%	56%	65% A	77% A B C	79% A B C
	Somewhat Important	36% E F	22%	21%	26%	15%	15%
	Important	25% D E F	26% D E F	23% D E F	8%	8%	6%
Importance - Web Professionalism	Not Important	39%	44%	50%	54%	62% A B	74% A B C D
	Somewhat Important	35% F	26% F	27% F	30% F	23%	13%
	Important	26%	30% E F	23%	16%	15%	13%
Importance - Brand Story	Not Important	32%	47%	49%	57% A	53% A	65% A B C
	Somewhat Important	33%	24%	24%	31%	31%	21%
	Important	35% D E F	29% D F	27% D F	12%	15%	14%

11. In Table 19 below, we see that age is a factor when it comes to where consumers say they typically shop for dairy items. Younger consumer respondents indicate they shop *outside of chain grocery stores* at a significantly higher rate than do older consumer respondents. This pattern is especially true when it comes to buying *directly from the dairy* and from *farmers markets*. This may be due to life circumstances (family, disposable income, mobility, etc.) or it may be due strictly to preference. In any case, it's noteworthy that the target customer for small, local dairy producers is quite possibly younger consumers more than older consumers.

Table 19: Consumer survey: report of where they typically buy dairy products, by age category

	Typical Source for Dairy Products by Age Category (n=750)					
	18-24	25-34	35-44	45-54	55-64	65+
	(A)	(B)	(C)	(D)	(E)	(F)
Direct from the dairy/farm store	18% D E F	10% F	10% F	3%	3%	1%
Farmers market	27% C D E F	16% E F	12% F	4%	3%	3%
Chain Grocery	71%	80%	80%	95% A B C	95% A B C	96% A B C
Boutique grocery store	10%	12% F	7%	2%	3%	2%
Specialty dairy store (e.g., Ice cream shop, cheese store)	17% F	15% F	13%	4%	6%	5%
Home delivery from dairy	5%	9% F	9% F	3%	2%	1%
Online from the producer's web site	6%	8%	7%	2%	2%	0% <sup>1</sup>
Online from a retail store's web site	6%	9%	9%	7%	4%	6%

# Analysis, Conclusions and Recommendations

## Analysis

The following are relevant, focused discoveries from the survey data:

- Small northeast dairies' primary customer is one who shops outside of chain grocery stores.
- Age is associated with where consumers shop for dairy products – younger consumers shop outside of chain stores at a higher rate than older consumers.
- Age is associated with a focus on branding, particularly the story associated with the brand. Younger consumers focus more heavily on branding elements – packaging, online presence, and brand story.
- Across all consumer respondents, “quality,” and “purity” resonate as marketing concepts.
- Those who shop outside of chain stores place a premium on the story behind brands and on buying *local* and the importance of *story* appears to increase the more intimately the consumer is exposed to the brand

## Conclusions

The theme that emerges from these survey findings:

### *Authenticity sells*

*Authenticity* appears to be a key factor when selling dairy products to northeast dairy processors' natural customers. Good *storytelling* amplifies authenticity. This observation that younger consumers appear more likely to want to become more intimate with dairy brands, connects to other research about younger consumers and brands:

- Recent research (e.g., Pew) suggests that Millennials – roughly 26-41, “crave authenticity” more than previous generations. Gen Z, maybe even more. They want to buy from companies whose values are aligned with their own.
- Implication for dairy brands: Knowing *who you are* as a brand and expressing that consistently, with transparency, is paramount.
- **Authenticity may reinforce belief that product will be of high quality, fresh, and pure, and therefore is sought after. This potential connection should be further explored.**

### *There are three different types of brand stories NE dairies tell*

Marketing and branding that is most effective begins with a vision for how the company sees itself and, therefore, the specific image and markets it wants to maintain. For this reason, in our extensive review of northeast dairy brands, we explored with a variety of processors the role they feel they play in the marketplace and what they *aspire* to be. In other words, we attempted to understand what was *authentically true* about each.

From our successive wave of observations, and in some cases interviews, we surfaced three main categories, or “archetypes,” that describe different company’s aspirations and, therefore, how they choose to represent themselves to the marketplace and consumers. We believe that these categories are not discrete; instead, the categories each describe the **dominant** company “persona,” understanding that most processors will **share** some characteristics of each category. Ultimately, the **story** it tells about itself tends to place a company into a particular category.

We discerned that there are three primary stories told by dairy producers in the northeast which we describe below. They are what we call the *artisan, steward, and corporate-advocate* stories.

#### *The Artisan Story (Craft-Forward: a story of “uniqueness and authenticity”)*

The *artisan* story highlights the *craft* of dairy product making more than the tradition of it. The *artisan* enterprise can often be family-run. It is usually a small or small-medium sized company. The dominant consumer target may be “foodies” or restaurants who want to be known for off the beaten path, discriminating taste, as in the tradition of a country or region in Europe, or for those who feel that dairy made in small batches, with greater individual care ensures a purer product. An emphasis on grass-fed/organic/humane treatment of animals usually comes with this category. The *artisan* story is one of *uniqueness and authenticity*, conjuring up artistic devotion and images of living off and close to the land and animals.

#### *The Steward Story (Land, Animal, Tradition Forward: a story of “mission”)*

The *steward* story is typically one of a multi-generation, family-run business, larger than an *artisan* processor, and often what one would consider a local institution. The focus is on the *tradition* of dairy product making. typically promote hyper-responsible practices for animals and land, and fresh quality product for consumers, harkening to a time gone by when the world was simpler. Milk (and other products like butter and local non-dairy specialties), especially when delivered to the home, often a decades-old practice, characterize the “steward” processor. The *steward* story is one of *mission*, to protect and pass on the land and profession for future generations, demonstrating this ability by its de facto ability to have survived at times a century or more as a company, and/or by its demonstrable devotion to its animals and land.

#### *The Corporate-Advocate Story (Brand forward: a story of “leverage for good”)*

This category includes corporate leaning companies that may be big or small – the distinguishing characteristic is that they are focused on building a company and brand more than they are remaining local *artisans*, or *stewards*, although they commonly invoke that image as a selling point and very well may qualify in those categories. *corporate-advocates* tend to be *cause-driven* corporations and therefore more brand- than product-forward.

The *corporate* category includes less established startup brands, often with playful flavor variations, aiming for national distribution. One finds ice cream or yogurt producers in this category often. The companies are usually larger entities which may once have been small dairies but who have built national and international brands, and who have greater market visibility. The *corporate-advocate* story is one of *leverage for good*, using the success of the company to care for suppliers downstream and for the social causes upstream.

We summarize the dairy processors in the following way, according to the brand stories they tell:

Table 20: summary of three emergent brand stories told by northeast dairy processors

Category/Archetype	Emphasis	Brand Theme	Typical Ownership	Size	Geographic Footprint
<b>Artisan Story</b>	Craft	Authenticity/Uniqueness	Family + Entrepreneur	Small to Med	Local/Regional
<b>Steward Story</b>	Tradition	Mission	Multi-generation family	Med to large	Local
<b>Corporate-Advocate Story</b>	Brand	Leverage for good	Corporate	Med to large	Local, regional, national

### Hybrid Categories

As mentioned, the categories outlined above – the *artisan*, *steward*, and *corporate-advocate* -- are not necessarily discrete; that is, **most** dairy processors will not fall completely into one category or another. Perhaps the most common “hybrid” category would be the *artisan-steward*, followed by the *corporate-steward*; most dairy processors understand that the health and well-being of their animals and the land is critical to the livelihood and to their ability to hand down their business to future generations or sell it at some point. While being a steward of animals and the land are a pivotal part of many dairy producer stories, we place companies the *steward* category that tell a primary story of preserving a specific tradition or way of life for themselves and their community and communicate artisanal impulses in other forms like quality and innovation. The squarely *steward* processors are mission-driven, and the primary mission is to preserve the dairy producer’s way of life and product indefinitely for generations.

## Recommendations

Based on the findings outlined above, we make the following recommendations for support organizations that focus on helping small dairy processors and the processors themselves. We also offer suggestions for future research that may build on our exploratory research and move the small dairy processor cohort forward in their branding efforts.

**Support organizations** can guide small dairies to know themselves better and provide resources so they can improve their storytelling

- Recognize proper dairy archetype (how the world relates to them) and mentor accordingly with clear path to resources that suit their mission – help them understand who they are and how to find “their” audience.
- Promote and honor different dairy *stories* to the public.
- Focus on regional identity and telling story behind different brands, sparking opportunities for customers to find dairies they would particularly value.
- Consider multiple sources and touch points consumers use for purchasing – focus on non-chain store customer and learn more about why they prefer to shop outside of them.
- Survey dairies to discern patterns and where help may be needed.
- Maintain better lists and data on dairies and practices (hardly any exist).

**Dairies** would do well get clear on what they want to be known primarily for (artisan, steward, corporate-advocate) and to focus on engaging younger and younger audiences:

- Your customer (the non-chain store shopper) values shopping local, values freshness, and responds to the story you tell. That should be part of your story. (Probably already is).
- Understand the younger consumer and why they are drawn to your products and your brand at a greater rate than older consumers appear to be.
- Get very clear on who you are and what you want to bring to the world. Stick to that in your storytelling, and your brand presentation of all types (packaging, social media posts, etc.)

Recommendations for **Future Research**:

- A more extensive, ethnographic study of customers who seek out northeast dairies would help to further explore and understand:
  - how smaller, local dairies are positioned in the consumer narrative vis a vis a field of options (e.g., stores)?
  - How current dairy practices impact customer narrative about who they want to buy from.
- Research into ROI of focusing on niche markets vs. wider markets

- Where will different types of dairies get greatest return for their efforts? Niche marketing, or more widely targeted marketing?
- What are the most meaningful ways for *different types* of dairies to measure success? Progress?
- Try to secure larger a larger, diverse sample of northeast dairy processors to draw more generalizable conclusions when surveying the audience. (Currently access to dairies has challenges.)
- Further explore what appears to be a trend in age difference in perception and preference and what's behind that (what the future looks like).
  - Is the variance due to other factors associated with age cohorts, or are our findings indicative of a shift in shopping patterns that will persist and/or intensify into the future?

## Action and Work Product: Case Studies and a Marketing/Branding Toolkit

### 12 Case Studies

The ultimate product of the research discussed above is the creation of case studies that will be instructive to small dairy processors as they plan and execute on their marketing and branding. We developed 12 case studies, which are attached to this document in the Appendix. We take a moment now to discuss the context in which we created the case studies.

As suggested, dairy processors in the northeast U.S. are not monolithic; in evaluating the list of processors we initially compiled, one of the strongest considerations was to choose a set of companies that represented variety. We wanted to extract and learn lessons from each case, rather than present companies that all take essentially the same approach to marketing and branding. While some of the companies we present here look similar, there is something about their story, marketing approach, or the messaging they strive for around their brand, that distinguishes them and present a variety of lessons. Ultimately, we chose companies that told a clear story about the ethos that drives it.

### Telling the brand story in context

When a consumer facing company markets itself successfully, its brand passes through four key thresholds: *Awareness*, when it is **noticed** by consumers; *Evaluation*, when it is **defined** in the consumer's mind; *Use*, when the consumer **uses** or **consumes** or **experiences** the brand and its products; and *Promotion*, when the consumer feels strongly enough about the value of the brand that they want others to use it.

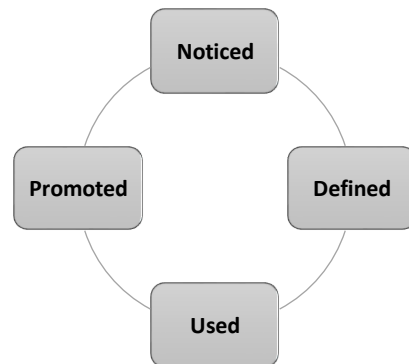


Figure 6: The brand life cycle in marketplaces

In presenting the case studies, we note the channels and techniques each processor uses to promote its brand and its products, so they get **noticed**; we then focus more heavily on the messaging and presentation the brand makes to shape how the consumer perceives and **defines** the brand. This definition leads



to the choice to use the brand's products at the same time it provides a context in which the consumer **experiences** the brand. If this context is positive and resonates with what the consumer wants in their lives, they then tend to **promote** the brand. Having consumers promote a brand alongside a branding effort is the ultimate accomplishment a brand can achieve.

**We selected companies to include in the case studies that appear to be successful at presenting a well-articulated image or story that assists the consumer in *defining* the brand and brand experience and, later, inspires the consumer to promote the brand. In the broader sense, we find that the processors featured here do an effective job of telling an *artisan, steward, or corporate-advocate* story.**

Given this mindset in evaluating the marketing and branding of dairy processors in the northeast U.S., you will find in the case studies that we present results from our survey of companies along with insight we were able to discern from an analysis of the companies' marketing materials and, in some cases, opportunities to interview company principals. Our intention is to communicate the "secret sauce" that appears to make the company a good model from which other companies can learn and be inspired to reflect on their own efforts to have the marketplace define their brand in an intentional and positive way.

### *The Marketing Environment/Context for NE Dairy Processors*

The size and ambition of a dairy processor goals will in large part determine how it goes about marketing and branding their products.

Producing dairy products beyond a certain volume threshold often requires significant resources and attendant liability (e.g., more land, larger herds, etc.); we found that most processors we spoke with and/or observed therefore focus on stable, gradual growth in business and, for administrative and expense considerations, limit their footprint to a local or regional scope. While many companies now have online stores and some have national distribution, companies with smaller staffs and less resources typically focus on local and regional sales.

And, in the case of dairy products, *local* and *fresh* are key selling features, further incenting companies to focus their marketing geographically. The possible exception to this, beyond offering sales online, is the potential for promoting outside the region, which most often is focused on agritourism, as well as products that may have longer shelf lives (e.g., ice cream).

Taken together, these factors suggest that the emphasis for marketing and branding for the companies we're focusing on is on building a regional reputation and customer base. Achieving national or some cases, international recognition and accolades only enhances the brand's appeal and agritourism potential. The mainstay, however, for most companies in the region is to compete effectively within the region itself.

## The Case Studies List

Below in Table 21 is a synopsis of the case studies presented in this document. Each business was selected for a defining characteristic that peer processors can learn from, whether large or small. They are grouped by the categories described above.

Table 21: listing of case studies

Category	Processor	Products	Location
Artisan Story (Craft forward)	Blue Ledge Farm	Cheese (Goat & Cow)	Vermont
	Consider Bardwell Farm	Cheese	Vermont
	Jasper Hill Farm	Cheese	Vermont
Steward Story (Animals, Land, Tradition forward)	Crescent Ridge Dairy	Milk, Ice Cream	Massachusetts
	Arethusa Farm	Butter, Milk, Yogurt, Cheese, Ice Cream	Connecticut
	Turner Dairy Farms	Milk	Pennsylvania
	Marburger Dairy	Milk, Butter, Yogurt, Cheese	Pennsylvania
	A.B. Munroe Dairy	Milk, Cream, Ice Cream	Rhode Island
	Shaw Farms	Milk, Ice Cream, Cream	Massachusetts
Corporate-Advocate Story (Brand forward)	Gifford's Ice Cream	Ice Cream, Frozen Yogurt	Maine
	Stonyfield Farm	Yogurt, Cream, Milk, Frozen Yogurt	New Hampshire
	Cabot Creamery	Cheese, Yogurt, Cream, Butter, Cottage Cheese	Vermont

The case studies can be found in the Appendix section.

## Marketing and Branding Toolkit

Incorporating learning from our research, and compiling best practices in sales, marketing, and branding for small enterprises that sell into food and hospitality marketplaces, we created a **toolkit** that small dairy processors can use to guide their marketing and branding efforts.

We organized the toolkit around the phases of that brands move through in the marketplace.

When a consumer-facing company markets and brands itself successfully, its brand passes through four key thresholds:

- *Awareness*, when it is **noticed** by consumers;
- *Assessment*, when it is **defined** in the consumer's mind;
- *Use*, when the consumer **uses** or **consumes** or **experiences** the brand and its products; and
- *Advocacy*, when the consumer feels strongly enough about the value of the brand that they **promote** it to others so they will experience it and, in turn, promote it further.

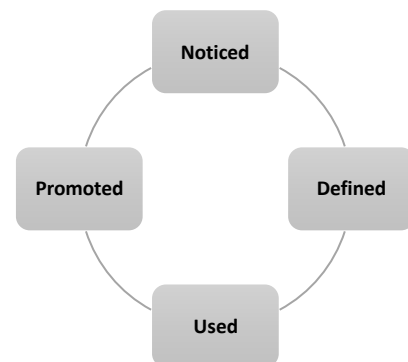


Figure 7: Brand lifecycle in marketplace

This phased process forms a cycle that is constantly evolving based on the conscious decisions a company makes about how you want to present their brand and the experience consumers will have with their products. A company can help consumers notice, define, use, and promote its products and its brand. Each phase feeds the subsequent phase and starts the cycle all over again.

**The toolkit can be found in the Appendix section.**

Appendix

## Case Studies



# Marketing and Branding for Small Dairy Processors in the Northeast U.S.

## 12 Case Studies

### June 2022

the  
**goodpeople**research  
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NORTHEAST DAIRY BUSINESS  
INNOVATION CENTER

# Table of Contents

- Introduction* ..... 1**
  - Purpose of the case studies.....1
  - Research behind the case studies.....2
  - The marketing environment/context for NE dairy processors.....4
  - Categories of processors: three different types of brand story .....4
  - Criteria for choosing cases .....6
  - Telling the brand story in context.....6
  - How to get the most out of the cases .....7
- The Case Studies*..... 9**
  - Case #1: Blue Ledge Farm.....10
  - Case #2: Consider Bardwell .....13
  - Case #3: Jasper Hill Farm.....16
  - Case #4: Crescent Ridge Dairy .....18
  - Case #5: Arethusa Farm .....21
  - Case #6: Turner Dairy Farms.....24
  - Case #7: Marburger Farm Dairy.....27
  - Case #8: A.B. Munroe Dairy.....30
  - Case #9: Shaw Farm .....33
  - Case #10: Gifford’s Ice Cream.....36
  - Case #11: Stonyfield Organic.....39
  - Case #12: Cabot Creamery .....42

## Introduction

Visitors to the northeast U.S. know that the landscape is punctuated by dairy producers that offer something for all fans; the foodie on an artisanal cheese safari to the family that visits the same ice cream stand every summer for generations. While the northeast draws tourists from all over to its famous countryside, the region's dairy producers must work hard to grow and popularize their brands while focusing on the demands of their craft.

Smaller dairy processors perhaps have the greatest challenges when it comes to building a brand as they typically lack a dedicated marketing professional or team. At most small dairy processors, the owner/proprietor is likely also the head of marketing, or possibly a staff member can devote part of the week to posting photos to Facebook and Instagram and respond to customer posts. There's little time to learn about different marketing and branding approaches, much less execute them consistently.

The following are **12 case studies** that describe how select dairy processors in the northeast United States<sup>1</sup> approach the task of marketing and branding their products. They are presented as a reference for other dairies that may be evaluating their own marketing and branding or planning to make changes in these areas. Mainly, they are provided so that the owners of smaller dairy processing businesses can have a reference for how others market and brand effectively, and decide how, if at all, they can apply the lessons to their own businesses.

### Marketing

In this presentation we use the term "marketing" to encompass the steps taken to present the company's products and get them into the market to make sales. These steps may include, but may not be limited to, advertising, promotion, relationship building, social media interaction, as well as distribution through farmers markets, farm stores, online stores, and traditional distributors.

### Branding

We define "branding" here as the steps taken to communicate an image of the company, which may include the design of the company's logo and promotional materials, including the company's website, as well as the language and storytelling the company uses to describe the distinctive role it plays in the marketplace or community.

## Purpose of the case studies

The production of these case studies is sponsored by the Northeast Dairy Business Innovation Center (NE-DBIC) as part of a larger program designed to help the region's dairy businesses stabilize and grow. NE-DBIC hired the Good People Research Company (GPR), a Virginia-based consumer research and advisory firm, to explore the marketing and branding methods used by the region's dairy processors. Accompanying these case studies is a Marketing Toolkit, a resource guide that provides an overview of different marketing and branding opportunities and techniques.

Some of the case studies profile small companies and others feature larger processors that have dedicated marketing teams; these examples are provided to share practices that have had the benefit of being tested on a larger scale after more significant investment of time and resources and can still be adopted by a smaller company.

<sup>1</sup> For purposes of this presentation, the "northeast U.S." contains 10 states: Connecticut, Delaware, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont.

Dairy processors in the northeast U.S. can use these case studies for ideas about, and gain a benchmark for, their own marketing and branding.

## Research behind the case studies

### *Dairy Processors*

The case studies presented were distilled from a review of 135 dairy processors located in the 10 states of the northeast U.S. whose presence was detectable through an ordinary online consumer search of retail stores and search engines with a focus on the region; our staff assumed the role of consumers searching for dairy products produced in the northeast or attainable in the northeast from local retail locations, whether they be a grocery store, farmers market, online store, or farm store.

We distilled the list of companies down to 50, using a coding system that evaluated the processor on three levels:

1. Size – we used the apparent geographic reach as well as information from the processors’ web sites as a proxy for size.
2. Effectiveness of branding and presentation – we reviewed the companies’ presentation for clarity and consistency, as well how compelling the storytelling was.
3. The company’s apparent positioning (i.e., aspiration for their brand) – we evaluated whether the company appeared to be attempting to be a specialty product made in small batches, a supplier of staple products to a local audience, or a brand recognized and positioned to grow well beyond the region.

We then surveyed these 50 companies to learn more about them and their approach to marketing and branding and 23 companies responded. Of these 23, we looked for diversity in size, types of products, and geographic location, as well as differences in the mix of branding efforts (e.g., use of video, detailed storytelling, timelines, etc.) and narrowed our list to 14 companies, with the goal of completing case studies for 12 of the 14. In a couple of cases, we selected companies to explore that were on our list of 50 but did not respond to our survey. In these cases, we analyze their branding efforts independent of details they might report about their marketing operations.

Ultimately, the case studies presented are ones we feel are examples of marketing and branding that characterize the different approaches found across dairies in the northeast, and that offer a variety of approaches from which to learn.

### *Consumers*

In June 2022, we surveyed 750 adult consumers (18+) about their dairy buying habits, their perceptions of everyday dairy brand marketing efforts, and the personal preferences they reference when evaluating a dairy brand for purchase.<sup>2</sup> 80% of the respondents reported they lived in the northeast or mid-Atlantic region of the U.S. In our analysis,<sup>3</sup> we decided to focus on this geographic segment because 60% of respondents who shop in chain grocery stores reported it was at least “somewhat important” that the dairy products be from the region, and upwards of 85% or more of those who typically use an outlet outside of chain grocery stores feel sourcing from the region is at least somewhat important.

<sup>2</sup> Details about this research can be found in the Northeast Dairy Business Innovation Center (NE-DBIC) section of the Vermont Agency of Agriculture, Food, and Markets (VAAFAM) website (<https://agriculture.vermont.gov/dbic>).

<sup>3</sup> We had oversampled for respondents from the northeast.



The findings suggest that 20% of respondents purchase dairy products outside of large chain groceries. A noteworthy pattern in the data is that those who purchase outside of chain grocery stores place a much greater emphasis on the “story” brands tell about themselves and their products, as well as the professionalism of the branding used on packaging and the producer’s website. Consequently, it is this audience – those who tend to purchase dairy products regularly outside of chain grocery stores – that likely constitute the core audience for small- to medium-sized dairy processors in the northeast, and they place emphasis on the story a dairy has to tell, and their branding efforts, far more than the typical dairy consumer. Further, the emphasis a producer places on telling their story registers as important as the “professionalism” of the brand’s web presence and/or packaging.

Survey respondents that report they shop for dairy products outside of chain grocery stores also report that being “local” is important at a significantly greater rate than do those who shop at chain grocery stores.

We interpret these findings as an indicator that what may differentiate smaller, more local dairy brands from competitors is “who they are” and how *clearly* and *authentically* they communicate their history and personality in a compelling, human way. When we looked at other survey responses, particularly to questions about the “type” of story or type of entity this core audience appears to prefer (e.g., small artisan, traditional multi-generation farm, or corporate brand), we find that stories of “traditional, multi-generation” farms are most compelling.

All this is to assert that a focus on storytelling – whether it comes in the form of words and paragraphs on a web site or is conveyed via Instagram images or package labels – is core to the branding small- to medium-sized dairies should focus on. The story of the brand, and what it symbolizes to potential customers, in many ways *is* the brand for many small processors as it represents a large part of the *experience* the consumer will have with the brand. This concept of story, which could perhaps be termed “backstory,” appears also to be central to the branding of large, corporate brands as we have illustrated by our including Stonyfield Organic (see Case #11 below) and Cabot Creamery (see Case #12 below) as part of our case studies.

As one might expect from a food item, the survey results also suggest that the product qualities themselves --- freshness, taste, purity, and health benefits – are critical to branding as well. It appears significant to use the right words in describing product qualities. However, controlling for product quality – ultimately paramount when it comes to dairy products – the impression created by the company’s story, along with the imagery it uses, ultimately positions the brand.

## The marketing environment/context for NE dairy processors

The size and ambition of a dairy processor's goals will in large part determine how it goes about marketing and branding its products.

Producing dairy products beyond a certain volume threshold often requires significant resources and attendant liability (e.g., more land, larger herds, etc.); we found that most processors we spoke with and/or observed therefore focus on stable, gradual growth in business and, for administrative and expense considerations, limit their footprint to a local or regional scope. While many companies now have online stores and some have national distribution, companies with smaller staffs and less resources typically focus on local and regional sales.

And, in the case of dairy products, "local" and "fresh" are key selling features, further incenting companies to focus their marketing geographically. The possible exception to this, beyond offering sales online, is the potential for promoting outside the region, which most often is focused on agritourism, as well as products that may have longer shelf lives (e.g., ice cream).

Taken together, these factors suggest that the emphasis for marketing and branding for the companies we're focusing on is on building a regional reputation and customer base. Achieving national or in some cases, international recognition and accolades only enhances the brand's appeal and agritourism potential. The mainstay, however, for most companies in the region is to compete effectively within the region itself.

## Categories of processors: three different types of brand story

Marketing and branding that is most effective begins with a vision for how the company sees itself and, therefore, the specific image and markets it wants to maintain. For this reason, we explored with a variety of processors the role they feel they play in the marketplace and what they *aspire* to be.

From our successive wave of observations, and in some cases interviews, we surfaced three main categories, or "archetypes," that describe different company's aspirations and, therefore, how they choose to represent themselves to the marketplace and consumers. We believe that these categories are not discrete; instead, the categories each describe the **dominant** company "persona," understanding that most processors will **share** some characteristics of each category. Ultimately, the **story** it tells about itself tends to place a company into a particular category.

We discerned that there are three primary stories told by dairy producers in the northeast which we describe below. They are what we call the *artisan, steward, and corporate-advocate* stories.

### The Artisan Story (Craft-Forward: a story of "uniqueness and authenticity")

The *artisan* story highlights the *craft* of dairy product making more than the tradition of it. The *artisan* enterprise can often be family-run. It is usually a small or small-medium sized company. The dominant consumer target may be "foodies" or restaurants who want to be known for off the beaten path, discriminating taste, as in the tradition of a country or region in Europe, or for those who feel that dairy made in small batches, with greater individual care ensures a purer product. An emphasis on grass-fed/organic/humane treatment of animals usually comes with this category. The *artisan* story is one of *uniqueness and authenticity*, conjuring up artistic devotion and images of living off and close to the land and animals.

## The Steward Story (Land, Animal, Tradition Forward: a story of “mission”)

The *steward* story is typically one of a multi-generation, family-run business, larger than an *artisan* processor, and often what one would consider a local institution. The focus is on the *tradition* of dairy product making. *Stewards* typically promote hyper-responsible practices for animals and land and fresh quality product for consumers, harkening to a time gone by when the world was simpler. Milk (and other products like butter and local non-dairy specialties), especially when delivered to the home and often a decades-old practice, characterize the *steward* processor. The *steward* story is one of *mission*, to protect and pass on the land and profession for future generations, demonstrating this ability by its de facto ability to have survived at times a century or more as a company, and/or by its demonstrable devotion to its animals and land.

## The Corporate-Advocate Story (Brand forward: a story of “leverage for good”)

This category includes corporate leaning companies that may be big or small – the distinguishing characteristic is that they are focused on building a company and brand more than they are remaining local *artisans*, or *stewards*, although they commonly invoke that image as a selling point and very well may qualify in those categories. *Corporate-advocates* tend to be *cause-driven* corporations and therefore more brand- than product-forward.

The *corporate* category includes less established startup brands, often with playful flavor variations, aiming for national distribution. One finds ice cream or yogurt producers in this category often. The companies are usually larger entities which may once have been small dairies but who have built national and international brands, and who have greater market visibility. The *corporate-advocate* story is one of *leverage for good*, using the success of the company to care for suppliers downstream and for the social causes upstream.

We summarize the dairy processors in the following way, according to the brand stories they tell:

Category/Archetype	Emphasis	Brand Theme	Typical Ownership	Size	Geographic Footprint
Artisan Story	Craft	Authenticity/Uniqueness	Family + Entrepreneur	Small to Med	Local/Regional
Steward Story	Tradition	Mission	Multi-generation family	Med to large	Local
Corporate-Advocate Story	Brand	Leverage for good	Corporate	Med to large	Local, regional, national

## Hybrid Categories

As mentioned, the categories outlined above – the *artisan*, *steward*, and *corporate-advocate* -- are not necessarily discrete; that is, **most** dairy processors will not fall completely into one category or another. Perhaps the most common “hybrid” category would be the *artisan-steward*, followed by the *corporate-steward*; most dairy processors understand that the health and well-being of their animals and the land is critical to the livelihood and to their ability to hand down their business to future generations or sell it at some point. While being a steward of animals and the land are a pivotal part of many dairy producer stories, we place companies the *steward* category that tell a primary story of preserving a specific tradition or way of life for themselves and their community and communicate artisanal impulses in other forms like quality and innovation. The squarely *steward* processors are mission-driven, and the primary mission is to preserve the dairy producer’s way of life and product indefinitely for generations.

## Criteria for choosing cases

As suggested, dairy processors in the northeast U.S. are not monolithic; in evaluating the list of processors we initially compiled, one of the strongest considerations was to choose a set of companies that represented variety. We wanted to extract and learn lessons from each case, rather than present companies that all take essentially the same approach to marketing and branding. While some of the companies we present here look similar, there is something about their story, marketing approach, or the messaging they strive for around their brand, that distinguishes them and present a variety of lessons. Ultimately, we chose companies that told a clear story about the ethos that drives it.

## Telling the brand story in context

When a consumer facing company markets itself successfully, its brand passes through four key thresholds: *Awareness*, when it is **noticed** by consumers; *Evaluation*, when it is **defined** in the consumer's mind; *Use*, when the consumer **uses** or **consumes** or **experiences** the brand and its products; and *Promotion*, when the consumer feels strongly enough about the value of the brand that they want others to use it.

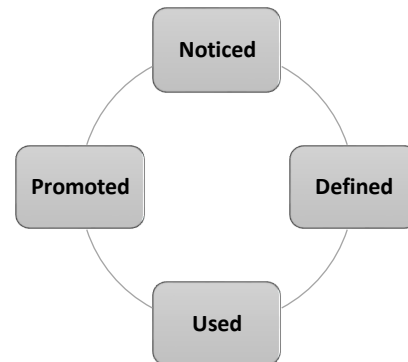


Figure 1: The brand life cycle in marketplaces

In presenting the case studies in this document, we note the channels and techniques each processor uses to promote its brand and its products, so they get **noticed**; we then focus more heavily on the messaging and presentation the brand makes to shape how the consumer perceives and **defines** the brand. This definition leads to the choice to use the brand's products at the same time it provides a context in which the consumer **experiences** the brand. If this context is positive and resonates with what the consumer wants in their lives, they then tend to **promote** the brand. Having consumers promote a brand alongside a branding effort is the ultimate accomplishment a brand can achieve.

**We selected companies to include in the case studies that appear to be successful at presenting a well-articulated image or story that assists the consumer in *defining* the brand and brand experience and, later, inspires the consumer to promote the brand. In the broader sense, we find that the processors featured here do an effective job of telling an *artisan, steward, or corporate-advocate* story.**

Given this mindset in evaluating the marketing and branding of dairy processors in the northeast U.S., you will find in the case studies that we present results from our survey of companies along with insight we were able to discern from an analysis of the companies' marketing materials and, in some cases, opportunities to interview company principals. Our intention is to communicate the "secret sauce" that appears to make the company a good model from which other companies can learn and be inspired to reflect on their own efforts to have the marketplace define their brand in an intentional and positive way.

### How to get the most out of the cases

For each case study, we provide some details on how the company approaches its marketing that come from the survey we conducted with company as well as from interviews (see Figure 2); this includes self-reported information about sales and marketing channels, and the way the company describes its own logo, messaging, and image. We recommend that readers use this information as a benchmark for what they are currently doing with their own companies and to gain ideas about channels or activities they may not have entertained before.

Perhaps most significant for the reader, by listening and observing, we attempt to isolate the key marketing and branding DNA that drives all the featured companies’ marketing and branding decisions. For each company, we spend time describing this essential element and how it threads through the company’s logo, packaging, web and social media design, and overall marketing direction. To get the most out of these cases, consider what you might adapt for your own business; you do not have to be “like” another company, nor have its resources or history, to be inspired by understanding what drives the peer company and how that is expressed in its marketing and branding. Think about what drives your company and how to communicate that to consumers.

One of the hardest things about building and maintaining a company, particularly in a competitive environment, is often the isolation from how others operate. In reading the following case studies, take advantage of this peek into how others tell their story, and use that perspective to understand better your own.

*We provide website addresses for each of the processors featured in case study. We encourage you to visit them and observe for yourself what you might take from their approach.*

SURVEY: PROMOTIONAL CHANNELS	
Website	✓
Facebook	✓
Instagram	✓
Twitter	
Pinterest	
YouTube	
Vimeo	
Emails/Newsletters	✓
Online ads in search engines (e.g., Google, Bing)	
Online banner ads on other websites	
Ads in online newspapers, magazines, blogs	
Ads in print newspapers or magazines	
Booths at community events/festivals	
Booths at food expos or trade shows	
Enter products into food awards competitions	
Sponsorship of local organizations (e.g., little league)	✓

Figure 2: Sample of "details" about a company's marketing from the processor survey.

## The Case Studies List

Below is a synopsis of the case studies presented in this document. Each business was selected for a defining characteristic that peer processors can learn from, whether large or small. They are grouped by the categories described above.

Category	Processor	Products	Location
Artisan Story (Craft forward)	Blue Ledge Farm	Cheese (Goat & Cow)	Vermont
	Consider Bardwell Farm	Cheese	Vermont
	Jasper Hill Farm	Cheese	Vermont
Steward Story (Animals, Land, Tradition forward)	Crescent Ridge Dairy	Milk, Ice Cream	Massachusetts
	Arethusa Farm	Butter, Milk, Yogurt, Cheese, Ice Cream	Connecticut
	Turner Dairy Farms	Milk	Pennsylvania
	Marburger Dairy	Milk, Butter, Yogurt, Cheese	Pennsylvania
	A.B. Munroe Dairy	Milk, Cream, Ice Cream	Rhode Island
	Shaw Farms	Milk, Ice Cream, Cream	Massachusetts
Corporate- Advocate Story (Brand forward)	Gifford's Ice Cream	Ice Cream, Frozen Yogurt	Maine
	Stonyfield Farm	Yogurt, Cream, Milk, Frozen Yogurt	New Hampshire
	Cabot Creamery	Cheese, Yogurt, Cream, Butter, Cottage Cheese, Dips	Vermont

# The Case Studies

# Case #1: Blue Ledge Farm

Artisan Cheese producer in Salisbury, Vermont

Blueledgefarm.com



Products  
Ownership  
Staff Size  
Marketing staff size  
Facebook followers  
Instagram followers

#### QUICK FACTS

Cheese (Goat and Cow)  
Family owned, 1-2 generations  
Fewer than 50  
0  
1000  
2,650



**BRANDING NOTES:** Artisans building a simple, authentic brand that reflects their own artistic sensibilities and lifestyle. Web presence presents a personal, family narrative and emphasizes sustainability. Simple, friendly logo and packaging that tells a story and distinguishes product on shelf.

## Who they are (their story)

Having met in Florence, Italy while studying art, Hannah Sessions and her husband, Greg, wanted a business that would allow them to live what they perceived as an “authentic” lifestyle and, at the same time, enable them to pursue their passion as artists. In 2000, they purchased Blue Ledge Farm and transformed an old cow dairy into a goat dairy. Two years later, they began making cheese.

Salisbury, Vermont-based Blue Ledge Farm currently has a herd of 150 goats. They also buy about 5000 pounds of cow’s milk each week from another farm. In all, Blue Ledge produces around 50,000 to 60,000 pounds of cheese annually, half from the cow’s milk, and half from their own goat milk.

Like many specialty dairies, Blue Ledge offers its products nationally and internationally via its website, but the company’s geographical footprint is primarily the east coast of the United States. The company uses distributors throughout Vermont, as well as in New York City and Boston. Distributors in New York and Boston in turn market their products throughout the remainder of the eastern seaboard.

## What they want to be (aspiration)

The couple, now raising their family on the farm, 20 years in, look to build a brand that someone can acquire and continue, should their children not wish to. While they consider themselves artisans, their messaging is about sustainability of the land, their animals, and, not insignificantly, their brand. In the end, they see themselves as *artisans-entrepreneurs* as they are bent on building a brand that can sustain itself. In deciding how to position the brand in the marketplace, they focus on echoing simplicity and authenticity; their label is intentionally minimalist, and their messaging focuses on the land, animals, and sustainability.



## How they market and sell their products (marketing)

Blue Ledge uses a variety of sales and marketing channels to bring both their products and brand to the public, including agritourism.

They stay on top of social media, posting photos and new products as they come. They have a farm store and an AirBnB offering to “stay on a working goat dairy.”

Focusing on a relatively small line of cheeses, they sell their products on their own farm and in other local farms stores, direct to restaurants and local retail groceries, and use distributors to extend their reach across the region. They also have an online store.

*They strive to stay “relevant”*

As a guiding mantra, Hannah and Greg strive not to light the world on fire with promotions but rather to stay “relevant.”

“We don’t want to disappear or become a brand that people aren’t excited about. We have to stay present. But it doesn’t mean we jump at every opportunity. We run an occasional ad in the newspaper. So maybe like twice a year just to stay you know, basically just to support our local newspaper and you know, maybe let people know about the farm stand.”

*They maintain an email list*

Just last year, Blue Ledge started doing more email blasts with a list of approximately 500 subscribers. Hannah sends out emails 3 to 4 times per year, noting that she has learned that the email list is one of the most important assets a company can have for marketing.

*They offer fun merchandise*

They offer merchandise – hats, hoodies, t-shirts – that feature their trademark blue and line drawing of the goats on the ledge. The models for the clothing are family members and staff.

SURVEY: PROMOTIONAL CHANNELS	
Website	✓
Facebook	✓
Instagram	✓
Twitter	
Pinterest	
YouTube	
Vimeo	
<b>Emails/Newsletters</b>	✓
Online ads in search engines (e.g., Google, Bing)	
Online banner ads on other websites	
Ads in online newspapers, magazines, blogs	
Ads in print newspapers or magazines	
Booths at community events/festivals	
Booths at food expos or trade shows	
Enter products into food awards competitions	
<b>Sponsorship of local organizations (e.g., little league)</b>	✓

SURVEY: SALES CHANNELS	
<b>Ecommerce on our website</b>	✓
<b>Ecommerce via another independent retail website</b>	✓
Online at large retail website (e.g., Amazon)	
<b>A store on our farm or property</b>	✓
<b>A store on someone else’s farm</b>	✓
Direct at local farmers markets	
Our own store at a retail location	
<b>Direct to local retail stores</b>	✓
<b>Direct to local restaurants/hotels/institutions</b>	✓
<b>Direct to non-local stores in my state</b>	✓
<b>Direct to regional stores in the Northeast</b>	✓
<b>Via distributor to local stores, restaurants, hotels etc.</b>	✓
<b>Via distributor to non-local stores, restaurants, hotels etc. in my state</b>	✓
<b>Via distributor to stores, restaurants, hotels etc. in the Northeast</b>	✓
Via distributor to stores, restaurants, hotels etc. nationally	
Home delivery using our own vehicles	

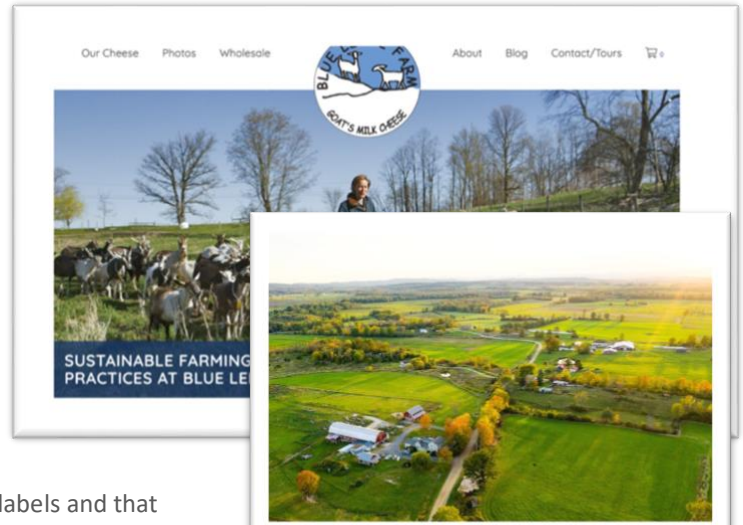
SURVEY: AGRITOURISM	
<b>Offer tours of processing facility</b>	✓
<b>Have a store on the farm</b>	✓
<b>Have lodging for guests (e.g., bed and breakfast)</b>	✓
<b>Part of a “farm/dairy trail” type offering</b>	✓
Guests can participate in processing products	
Dedicated tasting opportunity on site	
Local farm to table	

SURVEY: IN-HOUSE OR PROFESSIONAL?	WE DO	HIRE A PRO	DON'T DO
Logo Design	✓		
Website Design		✓	
Website Upkeep	✓		
Packaging Design	✓		
Social Media Posts	✓		
Advertising	✓		
Booths at Food Shows			✓
Booths at Farmers Markets			✓
Search Engine Optimization	✓		

## How they tell their story (branding)

### Website and social media

The Blue Ledge website uses visuals to tell the story of their dairy and to personalize the experience, all in line with an *artisan*-type “authenticity,” at the same time maintaining a clean, professional look. The site has a dedicated photos section that offers a personal look into the farm as the owners see it, including dramatic arial photos that show the farm’s layout and expanse from a bird’s eye view.



### Logo and packaging



“We take a lot of care with the colors of our labels and that they're very striking to see on the shelf. We keep our label design very simple.” A look at the Blue Ledge label and web site signals that Blue Ledge is about simplicity and sustainability, a lifestyle business that puts “life” and “style” at a premium; “life” in the form of living things – the land, the animals – “style” in the form of the artistic nature of the work and products.

Brands are symbols; Blue Ledge’s branding symbolizes the family’s work. Line-like drawings of goats on a hill; blue symbolizing sky, and water, and trust. Images on the web site of their family and life on the farm suggest that joy is found in the everyday appreciation of the land, the animals, and the craft.



## Why we like Blue Ledge Farm as a case study

With a logo and website that finds inspiration in the everyday life on the farm, Blue Ledge Farm tells a simple, cohesive story about life ensconced in a love of the land and animals. The owners bring you into their *artisan* world with photos of everyday life, sparking joy. Their branding is:

- Simple
- Authentic
- Personal
- Joyful

SURVEY: WORDS THAT DESCRIBE OUR LOGO	
Humorous/Funny	
Serious	
Realistic	
Cartoonish	
Fun	
<b>Friendly</b>	✓
Vintage	
<b>Old-Fashioned</b>	✓
<b>Classy</b>	✓
<b>Artisan</b>	✓
<b>Rustic</b>	✓
Botanical/floral	
Natural	
Traditional	
<b>Artistic</b>	✓
<b>Clean</b>	✓
<b>Simple</b>	✓
Boutique	
Modern	
Wholesome	
Healthy	

SURVEY: INTENTIONAL MARKETING MESSAGES	
Our family to your family	
<b>Generations of farmers</b>	✓
<b>We take good care of our cows/goats/sheep</b>	✓
<b>We take good care of the land</b>	✓
<b>We support the local community</b>	✓
<b>Small family farm</b>	✓
<b>Local farm to table</b>	✓
<b>Fresh</b>	✓
<b>No antibiotics/rBGH/additives</b>	✓
<b>Simple ingredients</b>	✓
<b>Highest quality/pure</b>	✓
<b>Nutritious</b>	✓
<b>Better tasting/delicious</b>	✓
<b>Local flavor or character</b>	✓
<b>Trusted neighbor</b>	✓

# Case #2: Consider Bardwell

Artisan cheesemaker with strong ties to NYC restaurants.  
Revived centuries old co-op on Vermont farm.

[considerbardwell.com](http://considerbardwell.com)



<u>QUICK FACTS</u>	
Products	Cheese
Ownership	Entrepreneur owned
Staff Size	Fewer than 50
Marketing staff size	0
Production	N/A
Facebook followers	4,500
Instagram followers	6,500



**BRANDING NOTES:** “Consider Bardwell” is the name of the original farmer whose ancestry dates to 14<sup>th</sup> century Scotland. Current owners revived a co-op founded in 1864. Cheese positioned as premium artisan cheese to be served in restaurants, farmers markets, and specialty shops. While an artisanal cheesemaker, the company emphasizes its commitment to being a steward of the land and local community.

## Who they are (their story)

Consider Bardwell Farm, in its current iteration, was born in 2001 soon after Angela Miller and her husband, Russell Glover, purchased a farm in Vermont to escape the bustle of New York City.

One day a high school student asked to visit the farm and interview the couple. The student informed Angela and Russell that their farm had been the oldest dairy cooperative in the area. Inspired by the history beneath their feet (and new home), the couple decided to revive the farm and name it after the farm’s original owner, a man from Suffolk, England named Consider Bardwell, who established the farm in the 1864.

With this unusual name and lineage as a basis, they ventured into the cheese producing business, and have employed local cheesemakers to guide their product, while Russell, an architect by trade, focused on developing the physical infrastructure of the dairy, and Angela, a literary agent who works with culinary writers and chefs, became the force behind the company’s sales efforts.

## What they want to be (aspiration)

Over the past 20 years, Consider Bardwell has become a nationally recognized brand and has made its way into fine restaurants and specialty shops. Having caught the wave of artisanal cheesemaking in the first decade of the century, the company now sees itself as an established artisanal cheese brand, poised to be acquired by entrepreneurs who can preserve the quality of the product and continue to enlarge the brand’s reach. They also want their legacy to be a steward of the land and local community.

## How they market and sell their products

### *They leverage relationships*

Through Angela, Consider Bardwell has strong ties to NYC restaurants and shops and has used this channel to get several prominent restaurants and specialty shops to try the company’s cheese line. As Russell points out, it’s one thing to get a chef to try your cheese, and another to have them continue to buy it.

In some ways, having a highly visible chef or shop owner try your product may place undue pressure on your company’s brand and reputation; if they like it, all is good. If they don’t, then word may spread quickly and present a significant challenge to the brand.

Consider Bardwell sought out the finest local cheesemaker they could and committed to paying what was needed to make great cheese and build the brand. It paid off; while the Covid pandemic hurt sales as it did for most producers, the company’s pre-Covid was one of rapid growth, particularly for a company founded by two individuals who had no direct prior experience in the business.

The company supported its reach into NYC and other areas by setting up small satellite operations, engaging young entrepreneurs who would transport and sell their cheese at green markets in and around the city.

### *They promote “mission”*

The company appears to have drawn its energy from its commitment to its place in the local area’s dairy history and the community they could build around that ideal.

Consider Bardwell places emphasis on and takes the time to explain how it is a “vertically integrated” company that has helped establish and continually supports local farms that supply it with its milk and how it has become a part of the regional land conservation effort.

A commitment to agritourism offerings further enables Consider Bardwell to tell its story to visitors and enhance the mystique that surrounds its colorful history.

SURVEY: PROMOTIONAL CHANNELS	
Website	✓
Facebook	✓
Instagram	✓
Twitter	
Pinterest	
YouTube	
Vimeo	
Emails/Newsletters	✓
Online ads in search engines (e.g., Google, Bing)	✓
Online banner ads on other websites	
Ads in online newspapers, magazines, blogs	
Ads in print newspapers or magazines	
Booths at community events/festivals	✓
Booths at food expos or trade shows	✓
Enter products into food awards competitions	
Sponsorship of local organizations (e.g., little league)	

SURVEY: SALES CHANNELS	
Ecommerce on our website	✓
Ecommerce via another independent retail website	
Online at large retail website (e.g., Amazon)	
A store on our farm or property	✓
A store on someone else’s farm	
Direct at local farmers markets	✓
Our own store at a retail location	
Direct to local retail stores	✓
Direct to local restaurants/hotels/institutions	✓
Direct to non-local stores in my state	✓
Direct to regional stores in the Northeast	✓
Via distributor to local stores, restaurants, hotels etc.	✓
Via distributor to non-local stores, restaurants, hotels etc. in my state	✓
Via distributor to stores, restaurants, hotels etc. in the Northeast	✓
Via distributor to stores, restaurants, hotels etc. nationally	✓
Home delivery using our own vehicles	

SURVEY: AGRITOURISM	
Offer tours of processing facility	✓
Have a store on the farm	✓
Have lodging for guests (e.g., bed and breakfast)	✓
Part of a “farm/dairy trail” type offering	✓
Guests can participate in processing products	
Dedicated tasting opportunity on site	
Local farm to table	

SURVEY: IN-HOUSE OR PROFESSIONAL?	WE DO	HIRE A PRO	DON'T DO
Logo Design		✓	
Website Design		✓	
Website Upkeep	✓		
Packaging Design		✓	
Social Media Posts		✓	
Advertising	✓		
Booths at Food Shows	✓		
Booths at Farmers Markets	✓		
Search Engine Optimization	✓		

## How they tell their story (branding)

### Web site and messaging

Consider Bardwell’s storytelling successfully blends the “craft forward” element of the *artisan* narrative with the “revival of tradition,” “conservation,” and “community” aspects of the *steward* narrative.

Ultimately, we place Consider Bardwell in the *artisan* space; the “stewardship” theme in their storytelling supports the authenticity of the artisan’s craft, instead of vice versa.

But the blend of *artisan* and *steward* is effective: As artisans, the company places its cheeses front and center on its site and focuses on what’s unique about them. As *stewards*, they devote a good deal of space in the “about us” section of the site talking about their mission: as an example, they were the first dairy east of the Mississippi to be enrolled in the Federal Grasslands Reserve program, a designation given to only one farm in the U.S. each year.

### Logo and packaging

Consider Bardwell’s logo and packaging incorporates a friendly set of animals, and an established date of 1864, the date the original farm was established. This date signals a *steward*-like ability to survive generations with the

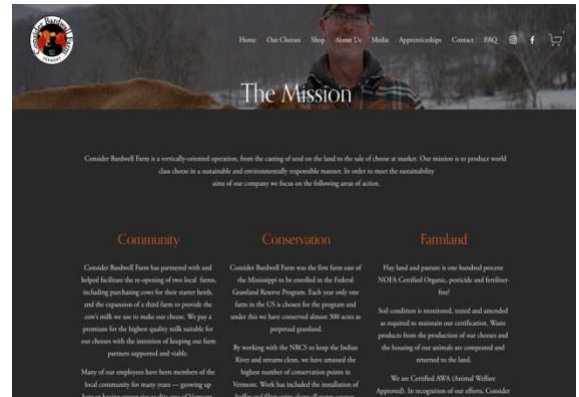


suggestion of generations to come. This blend of contemporary and established reflects the owner’s sentiment about honoring the land they purchased while modernizing the way the cheese will get to market.



## Why we like Consider Bardwell as a case study

Consider Bardwell branding combines elements of the *artisan* story with the *steward* story, placing the uniqueness of their cheeses up front at the same time contextualizing the craftsmanship with a backdrop of honoring history and committing to the preservation of the farm for future generations.



### SURVEY: WORDS THAT DESCRIBE OUR LOGO

Humorous/Funny	
Serious	
Realistic	
<b>Cartoonish</b>	✓
<b>Fun</b>	✓
<b>Friendly</b>	✓
<b>Vintage</b>	✓
Old-Fashioned	
Classy	
Artisan	
Rustic	
Botanical/floral	
Natural	
Traditional	
Artistic	
Clean	
Simple	
Boutique	
Modern	
Wholesome	
Healthy	

### SURVEY: INTENTIONAL MARKETING MESSAGES

Our family to your family	
Generations of farmers	
<b>We take good care of our cows/goats/sheep</b>	✓
<b>We take good care of the land</b>	✓
We support the local community	
Small family farm	
Local farm to table	
Fresh	
<b>No antibiotics/rBGH/additives</b>	✓
Simple ingredients	
Highest quality/pure	
Nutritious	
Better tasting/delicious	
Local flavor or character	
Trusted neighbor	

# Case #3: Jasper Hill Farm

20-year-old Northeast Kingdom, Vermont **artisan** cheese producer focused on promoting everyone from suppliers to store-based cheese mongers.

Jasperhillfarm.com



<u>QUICK FACTS</u>	
Products	Cheese
Ownership	Entrepreneur owned
Staff Size	N/A
Marketing staff size	N/A
Facebook followers	18,500
Instagram followers	51,700



**BRANDING NOTES:** Highly polished web site with extensive education about the many facets of the cheesemaking process, with acknowledgement and appreciation throughout to the different contributors of their success, an approach that translates into communicating gratitude and trust. Impressive Instagram following using a variety of compelling, colorful photos.

## Who they are (their story)

In 1998, two brothers, Andy and Mateo Kehler, bought “old Jasper Farm,” located on a rocky hillside in Vermont’s Northeast Kingdom. The farm sat nearby Caspian Lake, where the Kehler family had summered for more than 100 years. The brothers wanted to create a model for small-scale dairy farming that could offer more opportunities for Vermont’s “working landscape.” They called what they were doing “value-added agriculture:” the practice of transforming a raw material like milk into something more valuable before it leaves the farmer.

They built a creamery. They also created a cave ageing space for cultivating natural rinds as they observed that the highest value cheeses at the time were imported, European cheeses and they wanted to mimic those styles. They were able to market their first cheeses in 2003. They became part of the “American Artisan Cheese” movement and attracted the attention of Vermont-based, Cabot Creamery that needed an aging space dedicated to cultivating natural rinds.

Cabot has worked closely with Jasper Hill over the years. This collaboration is of a kind the Kehlers imagined when they spoke about Vermont’s “working landscape.”

## What they want to be (aspiration)

The Kehlers want to continue to play a central role in building out a more robust collaboration in the region and leverage that collaboration into a regional identity.



## How they tell their story (branding)

Jasper Hill tells a detailed story on its website, expressing gratitude and accolades for those with whom they work. They focus on the artisanal nature of their cheese while, like Consider Bardwell in case #2, they tell the story of how they leaned into reviving “the old Jasper Farm,” and in so doing, they became stewards of the land and the practice of cheesemaking.



### Web site and messaging

Jasper Hill’s website and Instagram profile is replete with clean, high-quality images that match the quality of those on their website.

### Logo and packaging



Jasper Hill does an effective job of encapsulating their *artisan* story in a one sentence, Instagram profile statement: “A Taste of Place. We make raw milk cheese from our own cows and ripen it in underground caves in Greensboro, VT.” From the striking square shape to the sophisticated and artistic font and muted blue and gold colors, the simple and tasteful logo reiterates the *artisan* message.

## Why we like Jasper Hill Farm as a case study

Jasper Hill has transformed an old farm, revived it, and brought it into modern times with vivid photos and storytelling. With every representation of the farm and their efforts, they communicate a message of detailed craftsmanship with an authentic reverence for the art, people, and infrastructure that are part of the process. Together, their style of storytelling captures the spirit of community they are trying to create.



Jasper Hill is a working dairy farm with an on-site creamery in the Northeast Kingdom of Vermont. An underground aging facility maximizes the potential of cheeses made by the creamery, as well as those made by other local producers. Leftover whey from the cheesemaking process is fed to heritage breed pigs, roaming the woodlands beyond the cows' pasture.

*They use images and video effectively*

With vivid, colorful images, Jasper Hill’s website walks the visitor through the various part of the farm, from a bird’s eye view of the barn and creamery to the pastures, to candid vignettes showing their cheese makers at work.



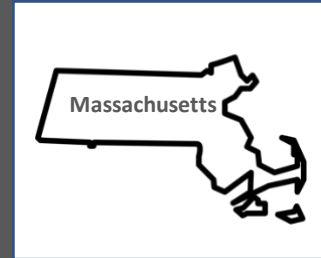
# Case #4: Crescent Ridge Dairy

90-year-old southern Massachusetts milk and ice cream producer, **steward** with home delivery and famous dairy bar

crescentridge.com  
crescentridgedairybar.com



<u>QUICK FACTS</u>	
Products	Milk, Ice Cream, Meat
Ownership	Family owned, 3+ generations
Staff Size	Fewer than 50 (80 peak)
Marketing staff size	2
Facebook followers	22,000
Instagram followers	5,876



**BRANDING NOTES:** Traditional dairy that leverages home delivery trucks for direct contact with customers and visibility as well as a fondness generations of families have for visiting its on-site dairy bar.

## Who they are (their story)

Crescent Ridge Dairy is owned by a third-generation, farming family with a fourth-generation family member that now works for the company. Crescent Ridge does home delivery of their own branded fluid milk and ice cream. They also sell some meat under their own brand, and little more than 200 other local items via home delivery. As a company that delivers products, Crescent Ridge is poised to be able to deliver all types of products, and they are open to any product that makes sense within their portfolio.

In the winter, they currently have 15 truck drivers. There are approximately 40 full time staff that doubles during the summertime to 80. Crescent Ridge's main footprint is southeastern Massachusetts, one of the larger independent operations in that area. They consider their reach to be the greater New England region.

They have a strong wholesale business in bulk fluid milk and ice cream to grocery stores, including Whole Foods stores in Massachusetts, Rhode Island, and New Hampshire.

## What they want to be (aspiration)

Primarily a milk producer, the company's goal is to maintain a strong presence in the northeast. The company does envision growing nationally with its ice cream business, if possible.

The Covid pandemic brought more competitors into the home delivery business, but Crescent Ridge seeks to leverage its reputation as a steward of traditional dairy delivery and service to protect both its dairy business as well as the profits derived from delivering other products on their routes.



## How they market their products (marketing)

### *They connect with tradition*

Crescent Ridge leverages their long tenure with a focus on the symbol of the delivery truck and the Dairy Bar (crescentridgedairybar.com), an on-site retail store, stirring an image of days, and service, gone by.

The Dairy Bar itself has been around for more than 50 years and has built a kind of a generational following: “people remember their grandma taking them here to get ice cream. and now they're bringing their kids,” according to Crescent Ridge’s head of marketing, Robert McCarthy.

A nostalgic impulse is a product of their home delivery as well. “20-25% of the people who sign up say “hey, I got that when I was a kid! I want it for my family.”

### *They connect with people*

Robert, as a dedicated marketing person, stays on top of social media, and has a staff person focusing on it as well.

If the company is being tagged in a story on social media, they’ll repost that story every day. Some weeks the company is on Facebook or Instagram every day, but most weeks at least 4 days per week monitoring activity and they tend to post around 2 times per week.

When they respond to social media posts, they do it with “the voice of a farmer,” says Robert. “You don't have to pretend you're something you're not but communicate with a voice that sounds authentic.”

The company’s delivery truck drivers also act as personal agents of the brand, interacting with customers daily, and extending the brand’s visibility as they move throughout the service region with company logo and messaging on the vehicles.

Robert points out that people who are looking for local food, want to interact with the producer who are making the product in any way they can. They have the benefit of home delivery drivers; home delivery customers get that same driver at their door every week, so the company can build a direct relationship with them.

SURVEY: PROMOTIONAL CHANNELS	
Website	✓
Facebook	✓
Instagram	✓
Twitter	✓
Pinterest	
YouTube	
Vimeo	
Emails/Newsletters	✓
Online ads in search engines (e.g., Google, Bing)	✓
Online banner ads on other websites	
Ads in online newspapers, magazines, blogs	
Ads in print newspapers or magazines	
Booths at community events/festivals	
Booths at food expos or trade shows	
Enter products into food awards competitions	✓
Sponsorship of local organizations (e.g., little league)	✓

SURVEY: SALES CHANNELS	
Ecommerce on our website	✓
Ecommerce via another independent retail website	✓
Online at large retail website (e.g., Amazon)	
A store on our farm or property	✓
A store on someone else’s farm	✓
Direct at local farmers markets	
Our own store at a retail location	✓
Direct to local retail stores	✓
Direct to local restaurants/hotels/institutions	✓
Direct to non-local stores in my state	✓
Direct to regional stores in the Northeast	✓
Via distributor to local stores, restaurants, hotels etc.	
Via distributor to non-local stores, restaurants, hotels etc. in my state	
Via distributor to stores, restaurants, hotels etc. in the Northeast	
Via distributor to stores, restaurants, hotels etc. nationally	
Home delivery using our own vehicles	✓

SURVEY: AGRITOURISM	
Offer tours of processing facility	
Have a store on the farm	✓
Have lodging for guests (e.g., bed and breakfast)	
Part of a “farm/dairy trail” type offering	
Guests can participate in processing products	
Dedicated tasting opportunity on site	
Local farm to table	

SURVEY: IN-HOUSE OR PROFESSIONAL?	WE DO	HIRE A PRO	DON'T DO
Logo Design	✓		
Website Design		✓	
Website Upkeep	✓		
Packaging Design	✓		
Social Media Posts	✓		
Advertising	✓		
Booths at Food Shows			✓
Booths at Farmers Markets			✓
Search Engine Optimization	✓		

## How they tell their story (branding)

### Website and messaging

The Crescent Ridge website features the dual nostalgic versions of the home delivery truck and the Dairy Bar. From a branding standpoint, the site uses the theme of long tenure as a frame.

The “About the Dairy” page of the site prominently displays the words “Fresh. Local. Delivered.,” summing up the key selling points of the dairy, and features a timeline reaching back to 1932, celebrating the company’s 90 years in business.

As mentioned above, Crescent Ridge has a separate site for the Dairy Bar (crescentridgedairybar.com) which devoted exclusively to its ice cream and ice cream cakes.

### Logo and packaging

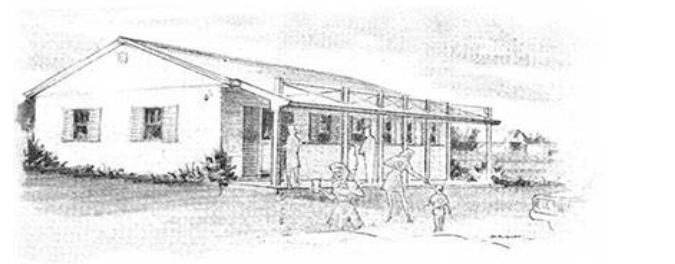


Crescent Ridge uses a very basic, traditional logo featuring a cow and a large “C.” Its packaging is equally as simple, prominent positioning the “C” with the cow. The image of the cow peeking through the “C” dates to the company’s founding.

## Why we like Crescent Ridge as a case study

Crescent Ridge has maintained a distinct advantage of having home delivery through which to reach and interact directly with customers weekly. While this appears to be an anchor for their marketing, along with their retail Dairy Bar, they follow through on telling their story of holding strong on tradition in a world where it may be easier to change.

- They tell a cohesive story – they’re committed to nostalgia and back it up with symbolism in branding
- They exude authenticity – they act and talk like local farmers



SURVEY: WORDS THAT DESCRIBE OUR LOGO	
Humorous/Funny	
Serious	
Realistic	
<b>Cartoonish</b>	✓
<b>Fun</b>	✓
<b>Friendly</b>	✓
<b>Vintage</b>	✓
Old-Fashioned	
Classy	
Artisan	
Rustic	
Botanical/floral	
Natural	
Traditional	
Artistic	
Clean	
Simple	
Boutique	
Modern	
Wholesome	
Healthy	

SURVEY: INTENTIONAL MARKETING MESSAGES	
Our family to your family	
Generations of farmers	
<b>We take good care of our cows/goats/sheep</b>	✓
<b>We take good care of the land</b>	✓
We support the local community	
Small family farm	
Local farm to table	
Fresh	
<b>No antibiotics/rBGH/additives</b>	✓
Simple ingredients	
Highest quality/pure	
Nutritious	
Better tasting/delicious	
Local flavor or character	
Trusted neighbor	

# Case #5: Arethusa Farm

Connecticut-based farm originally founded in 1868 purchased in 1999 as a land preservation project. In 2001, a new farm was born in the **steward** tradition. In 2009, the dairy began bottling milk.

arethusa.com



<u>QUICK FACTS</u>	
<b>Products</b>	Milk, cheese, butter, ice cream, yogurt
<b>Ownership</b>	Entrepreneur owned
<b>Staff Size</b>	Fewer than 50 (80 peak)
<b>Marketing staff size</b>	1
<b>Facebook followers</b>	26,000
<b>Instagram followers</b>	30,600



**BRANDING NOTES:** More than a century-old dairy is revived with humble new beginnings and boasts a 20-year steady growth success story that includes an added retail location, restaurant, and a bevy of awards in competition.

## Who they are (their story)

The owners of Arethusa Farm purchased the Litchfield, Connecticut farm in 1999, land that was slated for development after the original farm, founded in 1868, had changed hands years prior and the farm had been left to deteriorate. They purchased the property to preserve it as open space but had no immediate plans to revive the more than century-old dairy.

They were soon inspired to rebuild the historic dairy and began with 5 cows. They renovated the original barn and built new ones. Today, 300 cows inhabit the farm. They built a small dairy plant in what was the historic Bantam firehouse, striving to produce “milk like it used to taste.”

They then opened what was to become an award-winning restaurant Arethusa al tavolo in 2014 and, then a bakery, Arethusa a mano. Later, they added a second dairy store in downtown New Haven, Connecticut and a third location in West Hartford Center.

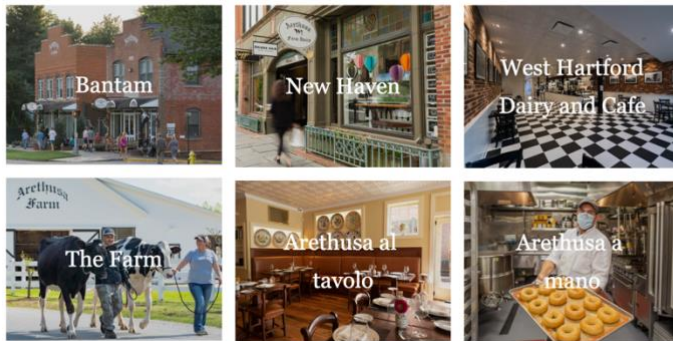
## What they want to be (aspiration)

Current day Arethusa epitomizes the modern-day *steward*, infusing a contemporary flair to a traditional and vital community function. Their goal is to preserve what is rich and good about the past and make it interesting to new generations. In this way, the company is in and of itself a classic *steward* story.

## How they market their products (marketing)

*They institutionalize their culture and message*

Arethusa has the strategic advantage of having a story to tell and multiple physical venues to tell it. Arethusa can reach customers and express its mission via its own retail outlets and restaurant.



This allows for a personal touch and an ability to extend the brand beyond milk, their core product. An award-winning restaurant, contemporary retail shops, a bakery, an historic farm – these are all simultaneously marketing, and branding vehicles and Arethusa appears to make the highest and greatest use of them, cross promoting each and featuring them in detail on their website.

SURVEY: PROMOTIONAL CHANNELS	
Website	✓
Facebook	✓
Instagram	✓
Twitter	
Pinterest	
YouTube	
Vimeo	
Emails/Newsletters	✓
Online ads in search engines (e.g., Google, Bing)	
Online banner ads on other websites	
Ads in online newspapers, magazines, blogs	
Ads in print newspapers or magazines	
Booths at community events/festivals	
Booths at food expos or trade shows	
Enter products into food awards competitions	✓
Sponsorship of local organizations (e.g., little league)	✓

SURVEY: SALES CHANNELS	
Ecommerce on our website	
Ecommerce via another independent retail website	
Online at large retail website (e.g., Amazon)	
A store on our farm or property	✓
A store on someone else's farm	
Direct at local farmers markets	
Our own store at a retail location	✓
Direct to local retail stores	✓
Direct to local restaurants/hotels/institutions	✓
Direct to non-local stores in my state	✓
Direct to regional stores in the Northeast	
Via distributor to local stores, restaurants, hotels etc.	✓
Via distributor to non-local stores, restaurants, hotels etc. in my state	✓
Via distributor to stores, restaurants, hotels etc. in the Northeast	✓
Via distributor to stores, restaurants, hotels etc. nationally	
Home delivery using our own vehicles	

SURVEY: AGRITOURISM	
Offer tours of processing facility	
Have a store on the farm	✓
Have lodging for guests (e.g., bed and breakfast)	
Part of a "farm/dairy trail" type offering	
Guests can participate in processing products	
Dedicated tasting opportunity on site	
Local farm to table	

SURVEY: IN-HOUSE OR PROFESSIONAL?	WE DO	HIRE A PRO	DON'T DO
Logo Design	✓		
Website Design	✓		
Website Upkeep	✓		
Packaging Design	✓		
Social Media Posts	✓		
Advertising	✓		
Booths at Food Shows	✓		
Booths at Farmers Markets			✓
Search Engine Optimization			✓

## How they tell their story (branding)

### Website and story

The “About” section of the Arethusa web site is devoted to a timeline reaching back to the original 1868 farm and marking the milestones that have brought the company to its current incarnation. The timeline itself reinforces the Arethusa *steward* story, learning from and honoring the origins and inspiration for the modern enterprise while celebrating the way they have managed to preserve a gem for the community and make it a vital part of modern life.



Their language focuses on the “good taste” of the milk they produce while fusing the charm of the past with a contemporary experience in their retail outlets.

### Logo



The Arethusa logo is solidly traditional in appearance, and intentionally presents a geographic identity, connecting with its Litchfield, Connecticut roots. The company itself characterizes the logo as “old-fashioned, classy, traditional, and boutique,” which summarizes its story and the manifestation of how it markets products through its own retail establishments.

SURVEY: WORDS THAT DESCRIBE OUR LOGO	
Humorous/Funny	
Serious	
Realistic	
Cartoonish	
Fun	
Friendly	
Vintage	
<b>Old-Fashioned</b>	✓
<b>Classy</b>	✓
Artisan	
Rustic	
Botanical/floral	
Natural	
<b>Traditional</b>	✓
Artistic	
Clean	
Simple	
<b>Boutique</b>	✓
Modern	
Wholesome	
Healthy	

SURVEY: INTENTIONAL MARKETING MESSAGES	
Our family to your family	
Generations of farmers	
<b>We take good care of our cows/goats/sheep</b>	✓
We take good care of the land	
We support the local community	
Small family farm	
Local farm to table	
Fresh	
No antibiotics/rBGH/additives	
<b>Simple ingredients</b>	✓
<b>Highest quality/pure</b>	✓
Nutritious	
<b>Better tasting/delicious</b>	✓
<b>Local flavor or character</b>	✓
Trusted neighbor	

## Why we like Arethusa Farm as a case study

Arethusa Farm makes a great case study because it expresses the *steward* story in simple, personal terms, while presenting a model for how to extend a brand into different physical, modern locations. The company is intentional and consistent in its use of language and its decision to anchor its brand in the preservation and revival of tradition.

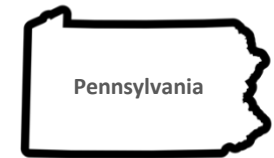
# Case #6: Turner Dairy Farms

90-year-old western Pennsylvania **steward** dairy with more than 100 awards for taste and quality at competitions since 1998.

turnerdairy.net



QUICK FACTS	
Products	Milk, Specialty Flavored Milk, Tea
Ownership	Family owned, 3+ generations
Staff Size	Large, 200+
Marketing staff size	2
Facebook followers	48,000
Instagram followers	10,000



**BRANDING NOTES:** Traditional dairy that focuses on freshness and flavor. Works with 35+ dairy farms within 70 miles of processing facility and all have a focus on caring for their cows and land sustainability. Despite winning international awards, focus is on local footprint.

## Who they are (their story)

Since 1930, Turner's has operated a fluid milk business and is an example of a dairy focused on supplying direct to local stores, restaurants, and institutions using their own fleet of trucks and personnel. They have approximately 250 employees across three plants in Pennsylvania. Their footprint is roughly a radius two hours out of Pittsburgh.

Turner Dairy Farms partners with 35 local, family dairy farms located within 70 miles of its main processing facility, near Pittsburgh. The company has earned more than 100 awards for taste and quality at national dairy product competitions since 1998.

The company tells a *steward's* story: they have preserved a focus on the art of milk making, are locally focused, and have maintained a straightforward service to the community at the same time introducing milk to current generations with creativity in new flavors and twists.

## What they want to be (aspiration)

According to Steve Turner, who runs marketing for the company, the company does not aspire to be a national brand but rather focus on delivering the highest quality product possible locally. The company's website asserts for Turner Dairy Farms "a Higher Standard of quality has always been at the forefront . . . Because we believe your family deserves it."



## How they market their products (marketing)

They draw attention to a staple like milk with new ideas and flavors

Turner Dairy goes direct to stores and other institutions and delivers what they present as milk with “quality you won’t find anywhere else.”



A straightforward message, the company gains attention by innovating with different flavored milk and gaining widespread recognition for their products by submitting them to national and international contests.

They control their distribution

Turner Dairy uses its own resources to market and distribute its products, using outside professionals only for creative functions like logo, package, and website design. They don’t use outside distributors, likely in part because they focus on a relatively narrow geographical area.

The combination of reaching out to gain national attention for their products via contests, but restricting their distribution to local communities, further supports and solidifies the message that the dairy is focused on quality and tradition.

They use social media

Turner staff regularly post to Facebook, featuring different products and repurposing video to its more than 48,000 followers. They feature new products and remind followers of mainstay ones (e.g., iced tea for hot summer days) and promote merchandise with Turner logo and images.



The combination of locally focused, in-house distribution efforts with reaching out on social media helps to position Turner as a hometown institution.

SURVEY: PROMOTIONAL CHANNELS	
Website	✓
Facebook	✓
Instagram	✓
Twitter	✓
Pinterest	
YouTube	✓
Vimeo	
Emails/Newsletters	✓
Online ads in search engines (e.g., Google, Bing)	✓
Online banner ads on other websites	✓
Ads in online newspapers, magazines, blogs	
Ads in print newspapers or magazines	
Booths at community events/festivals	
Booths at food expos or trade shows	
Enter products into food awards competitions	✓
Sponsorship of local organizations (e.g., little league)	✓

SURVEY: SALES CHANNELS	
Ecommerce on our website	
Ecommerce via another independent retail website	
Online at large retail website (e.g., Amazon)	
A store on our farm or property	
A store on someone else’s farm	
Direct at local farmers markets	
Our own store at a retail location	
Direct to local retail stores	✓
Direct to local restaurants/hotels/institutions	✓
Direct to non-local stores in my state	✓
Direct to regional stores in the Northeast	
Via distributor to local stores, restaurants, hotels etc.	
Via distributor to non-local stores, restaurants, hotels etc. in my state	
Via distributor to stores, restaurants, hotels etc. in the Northeast	
Via distributor to stores, restaurants, hotels etc. nationally	
Home delivery using our own vehicles	

SURVEY: AGRITOURISM	
Offer tours of processing facility	✓
Have a store on the farm	
Have lodging for guests (e.g., bed and breakfast)	
Part of a “farm/dairy trail” type offering	
Guests can participate in processing products	
Dedicated tasting opportunity on site	
Local farm to table	

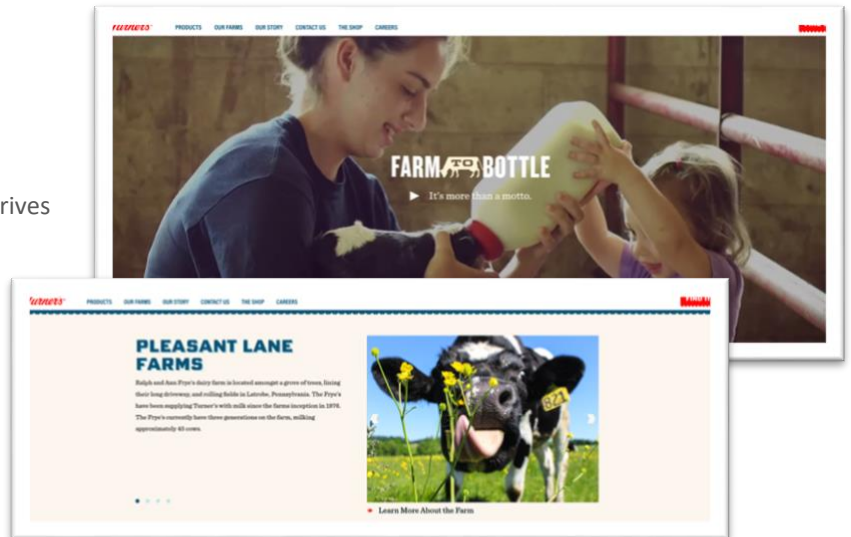
SURVEY: IN-HOUSE OR PROFESSIONAL?	WE DO	HIRE A PRO	DON'T DO
Logo Design		✓	
Website Design		✓	
Website Upkeep	✓		
Packaging Design		✓	
Social Media Posts	✓		
Advertising	✓		
Booths at Food Shows	✓		
Booths at Farmers Markets	✓		
Search Engine Optimization	✓		

## How they tell their story (branding)

### Web site and messaging

In addition to asserting that the company strives for “quality you won’t find anywhere else,” Turner Dairy promotes the farms that supply them with milk as a central feature of their site. They use video storytelling to introduce the farms.

More than this, they feature the farms under an umbrella message “Farm to bottle: it’s more than a motto. A video entitled, “Farm to Bottle,” is presented prominently on the company’s website.



### Logo and packaging



In keeping with Turner’s simple and direct approach to doing business, the company’s packaging features their logo and a drawing of a cow in a pasture.



The company itself describes its logo as “clean, simple, and modern.” The cursive font evokes the simpler time of the dairy’s founding and underscores the *steward* story.

## Why we like Turner Dairy as a case study

Turner Dairy is a good example of a company that doesn’t try to do too much, staying in its lane and focusing on quality. Because of this, the company’s simple message of “quality” comes through clearly.

This simplicity and focus permeate everything they do:

- They restrict their footprint to the local area
- They sell direct to businesses and not the public, yet their brand has a loyal following with 48,000+ Facebook followers
- The stick to one product – milk – yet they innovate within the category with flavors and advances like extending shelf life

The discipline and focus of the company’s goals and practices drive the company’s marketing as well. The story is straightforward and relatable, and so is the messaging.



# Case #7: Marburger Farm Dairy

85-year-old western Pennsylvania **steward** dairy, producing milk and offering a variety of tea products.

marburgerdairy.com



Products  
Ownership  
Staff Size  
Marketing staff size  
Facebook followers  
Instagram followers

#### QUICK FACTS

Milk plus Tea, Juice, Eggs  
Family owned, 3+ generations  
Mid-Sized, staff between 50-199  
0  
10,450  
0



**BRANDING NOTES:** Traditional dairy with simple website, featuring passing reference to awards (buttermilk) and its inclusion in the History Channels “Food Tech” series.

## Who they are (their story)

Marburger Farm Dairy is an interesting case to compare with Turner Dairy in Case #6. Similarly situated in western Pennsylvania (Evans City), the Marburger Farm dates to 1938 when George Marburger, a German immigrant purchased the 100-acre parcel of land to use for raising draft horses.

His son Adam later began dairy production on the property. Since then, three generations of the Marburger family have operated the dairy.

The dairy is locally focused and has maintained a simple and traditional look and feel to its website and packaging.

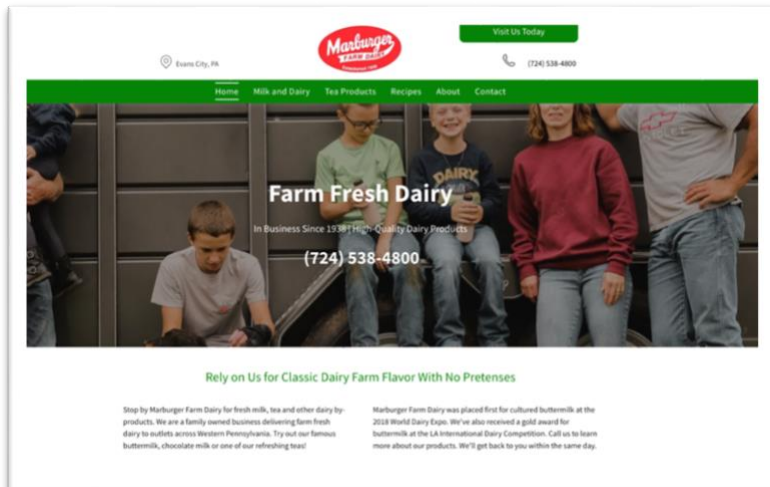
## What they want to be (aspiration)

Based on Marburger’s promotional material, including its website, the company appears to have found its niche as a local milk provider that embraces tradition and nostalgia. While the company promotes awards it has received for its buttermilk in national competitions, and its being featured on the History Channel’s Food Tech program, the story Marburger communicates is that it is somewhat of a throwback to a bygone era and that’s a good thing.

## How they market their products (marketing)

*They make it clear who they are and focus on local*

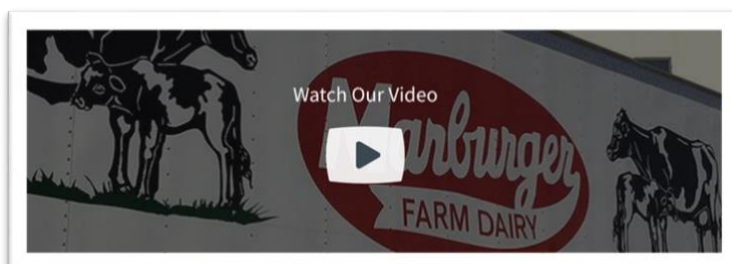
The first message you read on the Marburger site is “Rely on Us for Classic Dairy Farm Flavor with No Pretenses.”



The striking theme that runs through Marburger marketing and branding materials is the simplicity and unapologetic plainness to its presentation. As you can see from the tables to the right, the company’s response to our survey indicates that they do a good bit of promotion and advertising, as well as work with distributors to supplement their own distribution.

The company also invites website users to “visit us” and maintains its own store on the dairy property. This invitation to interreact directly with the family at its dairy is cemented with a home page video that simply instructs visitors to “watch our video.”

The video itself is a simple, straightforward rotation of photos with a narrator that touts Marburger’s quality and local availability, digressing only to tout its award-winning buttermilk. The video closes with phone numbers, and address, and the website address, with the narrator inviting viewers to visit the farm. It appears to be an ad that we developed for local TV and the Web, repurposed for the Marburger site.



SURVEY: PROMOTIONAL CHANNELS	
Website	✓
Facebook	✓
Instagram	
Twitter	
Pinterest	
YouTube	
Vimeo	
Emails/Newsletters	✓
Online ads in search engines (e.g., Google, Bing)	✓
Online banner ads on other websites	
Ads in online newspapers, magazines, blogs	✓
Ads in print newspapers or magazines	✓
Booths at community events/festivals	✓
Booths at food expos or trade shows	✓
Enter products into food awards competitions	✓
Sponsorship of local organizations (e.g., little league)	✓

SURVEY: SALES CHANNELS	
Ecommerce on our website	
Ecommerce via another independent retail website	
Online at large retail website (e.g., Amazon)	
A store on our farm or property	✓
A store on someone else’s farm	
Direct at local farmers markets	
Our own store at a retail location	
Direct to local retail stores	✓
Direct to local restaurants/hotels/institutions	✓
Direct to non-local stores in my state	✓
Direct to regional stores in the Northeast	✓
Via distributor to local stores, restaurants, hotels etc.	✓
Via distributor to non-local stores, restaurants, hotels etc. in my state	✓
Via distributor to stores, restaurants, hotels etc. in the Northeast	✓
Via distributor to stores, restaurants, hotels etc. nationally	✓
Home delivery using our own vehicles	✓

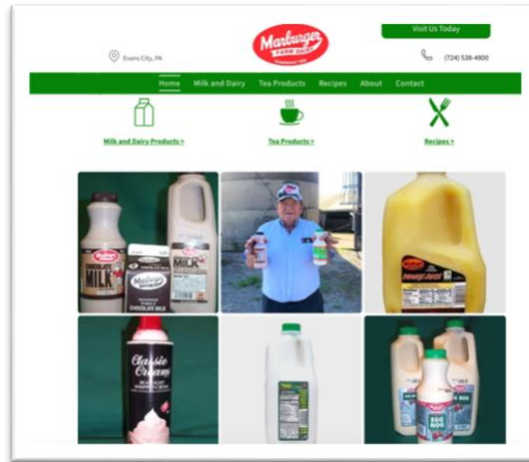
SURVEY: AGRITOURISM	
Offer tours of processing facility	
Have a store on the farm	✓
Have lodging for guests (e.g., bed and breakfast)	
Part of a “farm/dairy trail” type offering	
Guests can participate in processing products	
Dedicated tasting opportunity on site	
Local farm to table	

SURVEY: IN-HOUSE OR PROFESSIONAL?	WE DO	HIRE A PRO	DON'T DO
Logo Design	✓		
Website Design	✓		
Website Upkeep	✓		
Packaging Design	✓		
Social Media Posts	✓		
Advertising	✓		
Booths at Food Shows	✓		
Booths at Farmers Markets	✓		
Search Engine Optimization			✓

## How they tell their story (branding)

### Website and messaging

Marburger’s storytelling is plain and direct. The website home page features non-filtered, unadulterated photos of products, with family members and staff as “models.”



The presentation of products and family members in this manner reinforces its commitment to the way things “used to be.” To customers looking for sincerity and a commitment to the product over the presentation, Marburger Farm Dairy stands out as a charmed reminder of simpler times.

### Logo and packaging

In keeping with Marburger’s minimalist style, the company describes its own logo and packaging as “serious,” “old-fashioned,” “traditional,” “vintage,” “clean,” and “wholesome.”



This is an authentic representation of the company that appears to act and speak with a single, traditional voice throughout its marketing and branding.

SURVEY: WORDS THAT DESCRIBE OUR LOGO	
Humorous/Funny	
<b>Serious</b>	✓
Realistic	
Cartoonish	
Fun	
Friendly	
<b>Vintage</b>	✓
<b>Old-Fashioned</b>	✓
Classy	
Artisan	
Rustic	
Botanical/floral	
Natural	
<b>Traditional</b>	✓
Artistic	
<b>Clean</b>	✓
Simple	
Boutique	
Modern	
<b>Wholesome</b>	✓
Healthy	

SURVEY: INTENTIONAL MARKETING MESSAGES	
<b>Our family to your family</b>	✓
<b>Generations of farmers</b>	✓
<b>We take good care of our cows/goats/sheep</b>	✓
<b>We take good care of the land</b>	✓
<b>We support the local community</b>	✓
<b>Small family farm</b>	✓
<b>Local farm to table</b>	✓
<b>Fresh</b>	✓
<b>No antibiotics/rBGH/additives</b>	✓
<b>Simple ingredients</b>	✓
<b>Highest quality/pure</b>	✓
<b>Nutritious</b>	✓
<b>Better tasting/delicious</b>	✓
<b>Local flavor or character</b>	✓
<b>Trusted neighbor</b>	✓

## Why we like Marburger Farm Dairy as a case study

Marburger is a great example of a contemporary company that simply has held onto its roots and has not seen the need or advantage to change its image. The company is a true *steward* not only of a traditional milk producing process, but even more noteworthy of a marketing and branding ethos – what you see is what you get.

# Case #8: A.B. Munroe Dairy

140-year-old Rhode Island milk producer, **steward** with home delivery as a mainstay service.

cowtruck.com



## QUICK FACTS

Products	Milk, Ice Cream, Meat
Ownership	Family owned, 3+ generations
Staff Size	Small-medium: 51-200
Marketing staff size	N/A
Facebook followers	10,400
Instagram followers	1,725



**BRANDING NOTES:** Traditional dairy that leverages home delivery trucks for direct contact with customers. Engaging website with video and full variety of products from dairy to meat and poultry that be ordered directly from the site.

## Who they are (their story)

A.B. Munroe is a small, private, family-owned dairy in business since 1881 and owned by the Armstrong family since the 1930s. They have even occupied the same address on Brow Street in East Providence for the duration. Translating their *steward* philosophy into words, their tagline is “Some things are better left unchanged.” They regard themselves as preserving a family tradition by continuing to focus on home (and office) delivery -- direct-to-your-door service of fresh milk. Customers can customize delivery options ranging from leaving items in an insulated container on a porch to delivery people entering the house and placing the groceries in the refrigerator. Munroe Dairy guarantees the milk is fresh from the cow to the customer in no more than 48 hours and contains no artificial hormones or antibiotics. They continue to use old-fashioned reusable glass bottle packaging as well.

However, not everything they do is dictated by the past. They now rely on a website for online ordering, not only of their products but over two hundred other grocery items that are sourced mostly from other local, family-owned New England companies. Customers can order online up until midnight for next-day delivery.

## What they want to be (aspiration)

Their aspirations appear to be focused on stability and local growth in support of local businesses and farms, all using the same model that has been successful for them to date. According to their website, they serve close to 12,000 homes weekly, with milk representing 50% of the business. In fact, due to a huge increase in COVID-caused demand for home grocery delivery, they currently have a waiting list and are expanding their delivery routes and

service areas as they can add office and warehouse staff, receive backordered custom delivery trucks, and upgrade necessary infrastructure.

Though unstated in their marketing materials, this plan could be described as “if it ain’t broke, don’t fix it.”

Munroe Dairy reiterates their growth plan through a strong *steward* lens:

*“All processing and bottling is done at our plant and has been done here for the past 137 years. The success of the company has been its commitment to just do home delivery. Many of our products are not available in any store, and we support local food suppliers whenever possible. By doing this we offer a direct connect to you, the customer. We also believe that we can keep better control of the product if it is handled by our own delivery personnel in our own trucks. Our milk comes from local family-owned farms. It is not trucked in from huge factory farms and is not adulterated with additives, stabilizer, or synthetics. We feel that our dedication to providing quality products and friendly service has been the reason for 137 years of success.”*

## How they market their products (marketing)

*They leverage home delivery*

They grow within their existing business: home delivery. As their president, Rob Armstrong says in a video on their website, “Milk gets us in the door.” They can then market additional products to their customers additional products and expand their business.

A fleet of branded delivery trucks with uniformed delivery people present on the roads and in neighborhoods is another traditional way of marketing their products and services.

*They connect with people*

Munroe maintains an active online presence on Facebook, as well as Twitter, Instagram, YouTube, and Pinterest. Posts feature their products, along with new grocery products available for order, and ways their company supports and engages the local community. For example, they sponsor and participate in local events such as parades. Pictures are then featured on their Facebook and other social media pages.

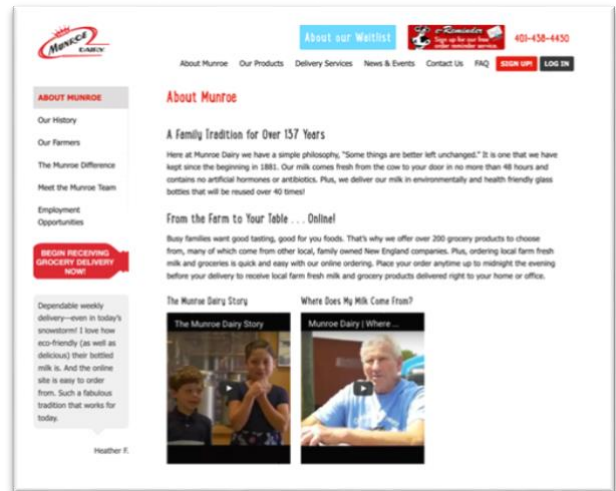
Munroe Dairy also operates Sacred Cow Scoop Shop and Market at their headquarters in E. Providence. Customers can buy Munroe ice cream, milk, and many other local products. The Scoop Shop also has a food truck that can sell their ice cream at special events.

## How they tell their story (branding)

### Web site and Messaging

The website is informative and includes photos of the family owners, information about the local dairy farmers they source from, recipe ideas, and lots of positive customer reviews. They also have a history of supporting local causes and events and their website hosts a form for event or donation requests. Finally, a link to their online store allows customers to shop for over 200 products online and provides easy access to customer service assistance with orders.

Munroe Dairy executives describe their company and business using the following terms: “practical luxury, “family,” “we care,” “icon,” and “industry leader.”



### Logo and packaging



Munroe’s logo highlights its long history by incorporating the dairy’s founding date of 1881 directly into the design. The font, colors, and crown design evoke tradition and history, suggestive of an old-fashioned 1950’s era drive-in diner.

The use of reusable glass bottles harkens back to the past, emphasizing quality, old-fashioned tradition, as well as an environmental ethic of reuse/recycle. They also suggest that glass is a healthy packaging alternative.

## Why we like A.B. Munroe as a case study

AB Munroe tells a *steward* story – in everything from their logo to their use of family members, home delivery, and traditional, retro images, the dairy does its best to preserve the honored traditions of the past and instill a sense of consistency in daily life.

# Case #9: Shaw Farm

115-year-old northern Massachusetts milk and ice cream producer, **steward** with home delivery and farm store

shawfarm.com



<u>QUICK FACTS</u>	
Products	Milk, Cream, Ice Cream + local products
Ownership	Family owned, 1-2 generations
Staff Size	Small, fewer than 50
Marketing staff size	1
Facebook followers	12,000
Instagram followers	480



**BRANDING NOTES:** Traditional dairy that leverages home delivery trucks for direct contact with customers and visibility as well as a farm store offering a variety of local products. All products available for home delivery. Heavy promotion of ice cream brand.

## Who they are (their story)

Shaw Farm is a multi-generational family dairy farm that exudes the very essence of the *steward* tradition. Warren Shaw, the current proprietor, sees the continuation of the dairy for the family and community as a duty and a service as much as it is a mainstay business.

In that vein, the dairy prides itself on its survival and the priorities it sets to accomplish that. Shaw Farms operates a store on the farm and provides home delivery. It promotes the processes and, importantly, the individuals who contribute to that process.

Warren is also active as a mentor to other farmers and dairy producers in Massachusetts. He serves on the Agriculture Land Preservation Committee for the state and is also a local radio host.

## What they want to be (aspiration)

Shaw Farms has positioned itself as a model of traditional farming and dairy production in Massachusetts and seeks to continue that role, including mentoring other farmers along with growing its own product line and expanding the reach of its ice cream brand outside of the local area.



## How they market their products (marketing)

### Website

The website is nice, simple, friendly, and informative. By modern standards, the casual user might think the Shaw Farm website could use some updating; but the plainness and simple presentation speaks to the charm of bygone days and that seems to be what Shaw Farm is all about.

### The Farm Store

The Shaw Farm Store is positioned as the center point of the Shaw Farm operation – you can visit directly, or you can have products delivered to your home if you live within the company’s delivery area (see below): dairy, meat, produce, bakery, and assorted other products. Shaw Farm can supply you with a variety of essential food products.

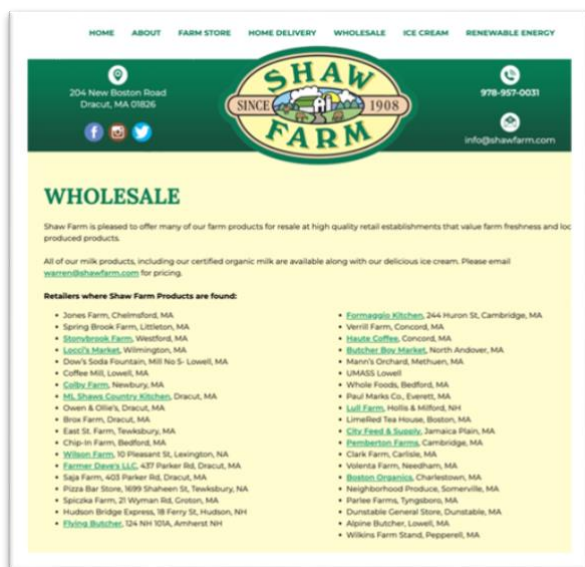
Shaw Farm milk is also available at other local farm stands.

### Home Delivery

The Home Delivery section of the site makes the delivery areas clear and allows you sign up for home delivery.

### Wholesale/Retail

Shaw Farms products can be found at over 20 retailers and restaurants in Massachusetts, including at least one Whole Foods location. These are listed on their website.



SURVEY: PROMOTIONAL CHANNELS	
Website	✓
Facebook	✓
Instagram	
Twitter	
Pinterest	
YouTube	
Vimeo	
Emails/Newsletters	✓
Online ads in search engines (e.g., Google, Bing)	✓
Online banner ads on other websites	
Ads in online newspapers, magazines, blogs	✓
Ads in print newspapers or magazines	✓
Booths at community events/festivals	
Booths at food expos or trade shows	
Enter products into food awards competitions	
Sponsorship of local organizations (e.g., little league)	

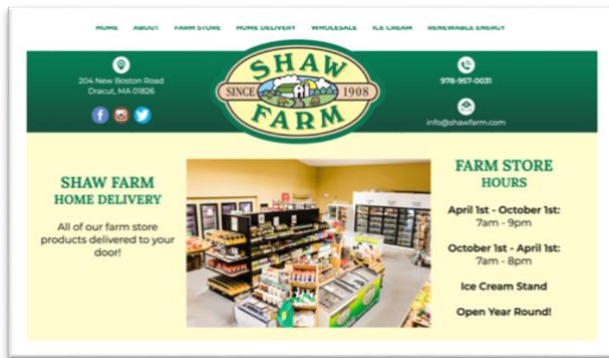
SURVEY: SALES CHANNELS	
Ecommerce on our website	✓
Ecommerce via another independent retail website	
Online at large retail website (e.g., Amazon)	
A store on our farm or property	✓
A store on someone else’s farm	✓
Direct at local farmers markets	
Our own store at a retail location	
Direct to local retail stores	✓
Direct to local restaurants/hotels/institutions	
Direct to non-local stores in my state	✓
Direct to regional stores in the Northeast	
Via distributor to local stores, restaurants, hotels etc.	
Via distributor to non-local stores, restaurants, hotels etc. in my state	
Via distributor to stores, restaurants, hotels etc. in the Northeast	
Via distributor to stores, restaurants, hotels etc. nationally	
Home delivery using our own vehicles	✓

SURVEY: AGRITOURISM	
Offer tours of processing facility	
Have a store on the farm	✓
Have lodging for guests (e.g., bed and breakfast)	
Part of a “farm/dairy trail” type offering	
Guests can participate in processing products	✓
Dedicated tasting opportunity on site	✓
Local farm to table	

SURVEY: IN-HOUSE OR PROFESSIONAL?	WE DO	HIRE A PRO	DON'T DO
Logo Design	✓		
Website Design	✓		
Website Upkeep	✓		
Packaging Design	✓		
Social Media Posts	✓		
Advertising	✓		
Booths at Food Shows	✓		
Booths at Farmers Markets	✓		
Search Engine Optimization			✓



## How they tell their story (branding)



### Web site and Messaging

The Shaw Farm website is reflective of the company’s straightforward, transparent approach to producing and selling products. Everything you might want to know is right on the top part of the home page (except for the detail provided about the people and process involved in the company’s “supply chain,” (that’s provided in the “About” section).

Farm store hours are listed right at the top, as is the fact that you can get any product from the store delivered to your home. The links available indicate that you can

also order wholesale and find out where to get Shaw products at your local store in Massachusetts.

This simple, direct approach to providing information is part of what communicates brand; the simplicity reinforces transparency and the proactive steps the dairy will take to give customers what they need.

### Logo and Packaging

The logo is friendly and simple. We see the use of a cartoon-like visual of a farm that feels safe and fun and the “1908” founding date that lends credibility and gravitas to the brand.



Shaw Farm milk can be purchased in quart glass bottles in a nod to traditional milk packaging but is also sold in plastic bottles of various sizes.

SURVEY: INTENTIONAL MARKETING MESSAGES	
<b>Our family to your family</b>	✓
<b>Generations of farmers</b>	✓
We take good care of our cows/goats/sheep	
We take good care of the land	
<b>We support the local community</b>	✓
<b>Small family farm</b>	✓
Local farm to table	
Fresh	
No antibiotics/rBGH/additives	
Simple ingredients	
Highest quality/pure	
Nutritious	
Better tasting/delicious	
Local flavor or character	
Trusted neighbor	

## Why we like Shaw Farm as a case study

Shaw Farm is a model for telling the *steward* story. The messaging is about the process of making milk and the foundation provided it by the land, the people, and their commitment. From a messaging point of view this approach translates to something that engages the consumer who is looking for something to believe in when it comes to supporting a food provider. It motivates the consumer to support and promote the brand.

# Case #10: Gifford's Ice Cream

120-year-old Maine ice cream producer that weaves a traditional family story into a modern **corporate** brand.

[giffordsicecream.com](http://giffordsicecream.com)



<u>QUICK FACTS</u>	
Products	Ice Cream, Frozen Yogurt
Ownership	Family owned, 5 generations
Staff Size	Mid-sized; 51-200
Marketing staff size	1+
Facebook followers	66,000
Instagram followers	7,900



**BRANDING NOTES:** Modern, fun ice cream brand that traces its roots to a 19<sup>th</sup> century dairy farm with a first retail location opening in 1980. Polished, professional website using the company's history to anchor what could be mistaken for a completely new brand.

## Who they are (their story)

Navigate to the "About" page of the Gifford's Ice Cream website, and you're greeted with the headline, "With Gifford's, Ice Cream is Family." Rooted in a family milk and ice cream delivery business begun in the late 1800s, Gifford's Ice Cream was founded by Audrey and Randall Gifford in New England on a small Maine dairy farm using family recipes. Almost fifty years later, Giffords is a fifth-generation, family-owned company that sources its fresh milk and cream exclusively from independent family farms and uses antique Cherry Burrell freezers to slow churn its more than 100 unique flavors of ice cream, frozen yogurt, sorbets, and sherbet. The award-winning company sells over 2 million gallons of ice cream annually in supermarkets, shops, institutions, and restaurants throughout the Eastern United States from Maine to Virginia and in select states as far west as Illinois. They also operate five ice cream stands in Maine.

## What they want to be (aspiration)

Giffords Ice Cream draws strength from its Maine roots, using it to branch out more widely as it aims for a national presence. While still maintaining their ice cream stands in Maine, the fact that they have pursued partnerships with regionally based national brands such as Maine-based L.L. Bean and the New England and Boston professional sports teams demonstrates their desire to grow within and beyond New England.

However, they are consistent in maintaining the business as a family operation and in keeping their Maine corporate location and local sourcing of milk.

## How they market their products (marketing)

### *They connect with tradition*

Giffords' seasonal summer ice cream stands in Maine are a clear reference to their traditional, small-town New England past. A summer visit to the local ice cream stand is a real Maine tradition, and Gifford's New England and Maine-themed flavors also contribute to the tradition.

### *They partner to expand their range*

Partnerships with big and famous regional brands (sports teams, legendary retailer L.L. Bean) also tie Giffords' history to the traditions of those brands. At the same time, this enables Giffords to reach thousands of potential new regional and national customers who follow New England sports teams, for example.

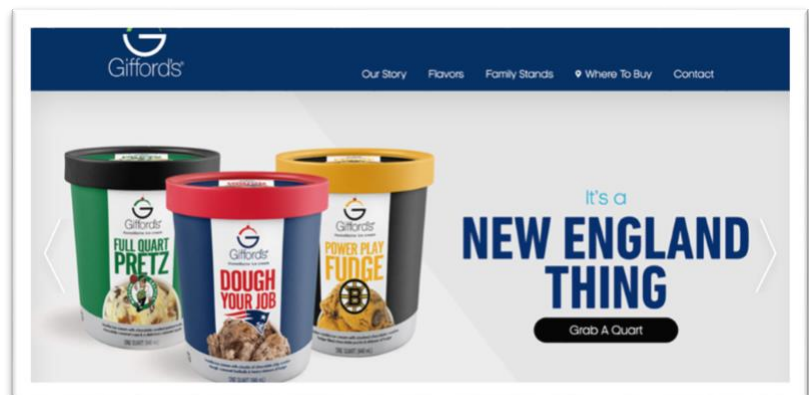
Expansion along the Eastern seaboard and westward into the Midwest means reaching out to new customers who may never have heard of Giffords or have been to an ice cream stand in Maine, necessitating a reliance on the story of the family-run nature of the company and the traditional New England history. Gifford's coined phrase, "HomeMaine Ice Cream" reiterates and helps to sell this story. It confers authenticity, freshness, and quality that could persuade new customers to try their product.

### *They connect with people*

Giffords offers a monthly newsletter for fans, along with an extremely robust Facebook presence, as well as social engagement on Instagram, Twitter, and Pinterest. Samantha (Gifford) Plourd, a fifth-generation family member, is the company's Marketing Manager.

To grow their Instagram following and publicize their new flavor "Full Quart Pretz" commemorating the new partnership with the Boston Celtics, Gifford's offered a Sweepstakes where entry involved engaging with Giffords on Instagram and offered a year's worth of ice cream as a prize.

New England teams have numerous and passionate fans, and the social media campaign asking people to post photos of themselves in team gear while eating Gifford's ice cream likely generated a huge amount of publicity for Gifford's.



## How they tell their story (branding)

### Web site and messaging

The website is professional, simple, and clean. Nothing is there that doesn't need to be there. The company's history is presented up front with lots of black and white photos, but a timeline brings us up to the present by showcasing significant growth events and updated branding. There is a short description of the ice cream making process and the newest generation of Giffords who run the company. A page presenting the 100+ ice cream flavors includes tempting pictures of each flavor, and each of the five ice cream stands has its own page with information and events. A "where to buy" page and a "Contact Us" page round out the main website offerings.



Though there is plenty there to honor Gifford's past, as the site content demonstrates, this brand is not primarily interested in telling a *steward* or *advocate* story – there is little to no information about maintaining family farms, how the cows are treated and which farms the milk comes from, or the importance of organic ingredients.

### Logo and packaging



The Giffords branding and logo are completely modern, evoking a bowl of ice cream with a cherry on top and a spare, angular, modern font. There is no hearkening back to the past, and despite strong Maine roots there is no rural or farm feel. Previously, the branding on the packaging presented an earthy, woody brown background with the flavor name prominently displayed and the Gifford's logo almost an afterthought. The new packaging has a cleaner, brighter, more colorful look and feel with the logo in a more prominent position.

In 2021, the branding on the packaging went from this (L) to this (R):



## Why we like Giffords as a case study

Giffords makes an interesting *corporate* case study as a family-run company that started small in Maine but has since grown and aspires to greater national growth. They are different from some of their larger *corporate* counterparts in that their story does not highlight *advocate* or *steward* messaging. Though they do reference their longstanding Maine roots and Maine ingredients, and they clearly position themselves with an albeit more subdued marketing connection to New England.

# Case #11: Stonyfield Organic

40-year-old, entrepreneur-founded New Hampshire company propelled to a national brand focusing on organic yogurt and advocacy.

Stonyfield.com



<u>QUICK FACTS</u>	
Products	Yogurt, milk, cream, frozen yogurt, yogurt smoothies
Ownership	Corporate owned
Staff Size	Large
Marketing staff size	N/A
Facebook followers	507,000
Instagram followers	35,600



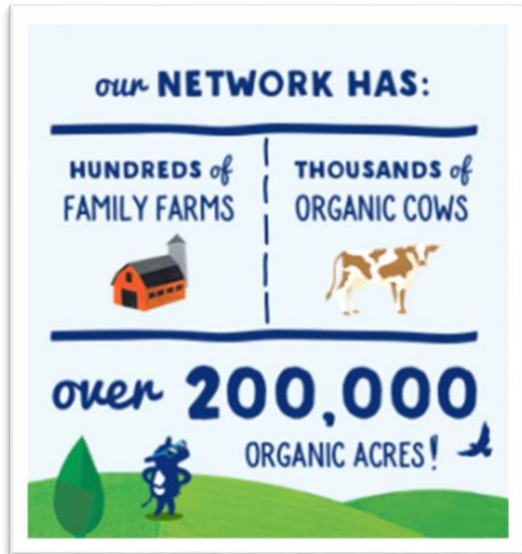
**BRANDING NOTES:** Small-time New Hampshire yogurt start-up company is now a huge national corporate/advocate brand with a professional website and marketing. It maintains its friendly and folksy look and feel along with passionate support for the original mission of working for “healthy food, healthy people, and healthy planet” and being “obsessively organic.”

## Who they are (their story)

Stonyfield Farm was founded in 1983 by co-founders Samuel Kaymen and Gary Hirshberg who were running a nonprofit organic farming school on a small New Hampshire farm. Their goals were to help family farms survive, keep food and food production healthy, and help protect the environment. To raise funds for the school, they began to produce organic yogurt from the milk of the school’s seven cows. The yogurt was so popular they turned their attention to creating a yogurt business instead of running the school, realizing they could make a bigger difference for the environment, family farms, and people that way.

Today, Stonyfield organic yogurts, smoothies, frozen yogurts, milk, and cream are sold in supermarkets, natural food stores and colleges across the country. It is all organic and made without the use of toxic persistent pesticides, artificial hormones, antibiotics, or GMOs. Stonyfield’s tagline, “Good on Purpose,” is an example of how a (now) large corporation uses its power to advocate.

Stonyfield remains in New Hampshire and their organic ingredient purchases support a huge network of food producers made up of hundreds of organic family farms, thousands of organic cows, and over 200,000 organic acres.



## What they want to be (aspiration)

Stonyfield is a certified B Corporation and has spent considerable time and effort to pioneer planet-friendly business practices, including offsetting their yogurt works' emissions, to making yogurt cups from plants instead of petroleum, to making their own renewable energy, and much more.

They are well-known for their environmental practices and organic ingredients and are a large supporter of organic dairy farms across New England. In addition, they have become a major player in yogurt products marketed for babies and children.

## How they market their products (marketing)

### *They advocate*

Stonyfield is an active advocate for environmental health, organic farming, and keeping small family farms in business. Their website (including their blog), social media posts, and even their packaging labels support this advocacy role. Stonyfield also asks its supporters to take action to help with these causes: co-founder Gary Hirshberg launched a new non-profit, the Northeast Organic Family Farm Partnership (NOFFP), to connect family farms, brands, government agencies and activists. Stonyfield's marketing directly asks its customers and supporters to sign the pledge promising to purchase organic products that will support organic family farms.

### *They connect with people*

Though present and available in supermarkets all around the country, Stonyfield's strategy is to connect with people who care about their health, the environment, and supporting family farmers. Marketing to both parents who want to feed their children healthy, organic, pesticide-free food as well as marketing to the kids themselves is also important strategy, as can be seen in the huge growth of their baby and child yogurt products (YoBaby and Stonyfield Kids pouches, cups, and tubes).

### *They partner with other brands*

Stonyfield reaches customers by partnering with other like-minded brands, such as quick-serve restaurant Panera. Panera is also known for their support of "clean" healthy foods and the environment. Stonyfield's yogurt tubes are included as a side option in Panera's kids' meals.



## How they tell their story (branding)

### Web site and Messaging

Stonyfield has a large section on its website describing its story and explaining the mission of the two co-founders. Building on this, a section with in-depth blog posts covers topics such as the nutrition benefits of dairy, why organic farming is important, what running a small family farm is like, and more.

Stonyfield’s website also provides helpful tips and recipes for using their products and links to their numerous social media sites. Their social media posts (including Facebook, Instagram, Twitter, Pinterest, and YouTube) back the more serious topics up, but they also have a lot of fun posts that connect back to their small origins and unpretentious, welcoming vibe.



### Logo and Packaging



Stonyfield’s logo is a friendly drawing of green hills with a red barn and a blue sky. Kids’ products have kid-friendly imagery such as cartoon fruits and happy kids.



## Why we like Stonyfield Organic as a case study

Stonyfield epitomizes a *corporate-advocate* story. If you didn’t know better, despite their growth into one of the largest yogurt companies in the country, you might continue think of them as a start-up company supporting organic farming and advocating against pesticide usage. This ethic infuses all their marketing, from the story they tell about themselves to their actions in the marketplace.

# Case #12: Cabot Creamery

100-year-old Vermont-based dairy cooperative, leader among Northeast dairies with a strong advocacy agenda.

[cabotcheese.coop](http://cabotcheese.coop)



**Products**  
**Ownership**  
**Staff Size**  
**Marketing staff size**  
**Facebook followers**  
**Instagram followers**

QUICK FACTS

Cheese, butter, yogurt, creams, cottage cheese, dips  
 Cooperative  
 Very large (501-1,000+)  
 More than 5  
 162,300  
 59,800



**BRANDING NOTES:** Large national brand that uses local type activities – recipes, community, etc. to anchor its brand in a local feel.

## Who they are (their story)

Founded in 1919 by 94 Vermont dairy farm families, Cabot Creamery is one the nation’s best-known dairy cooperatives. Today Cabot counts 800 New England dairy farmers as members and employs more than 1,000 people across four states. Cabot is now a part of the larger parent Agri-Mark Cooperative which markets dairy products under the Cabot, McAdam, and Agri-Mark brands.

Cabot has won many awards over the years and is widely known for its different varieties of cheddar cheese. It also produces creams, dips, cottage cheese, butter, and yogurt. Cabot products can be found in supermarkets nationwide. Having grown from small beginnings, they are one of the largest dairy companies in the U.S. today. It is a point of pride that Cabot was the first dairy co-operative to become a certified B Corporation. Cabot’s marketing emphasizes the structural advantages of being a co-operative: the ability to focus on creating a sustainable business that serves and prioritizes the needs of the farmer-members, community, environment, animals, and customers – instead of a pure focus on corporate profits.



## How they market their products (marketing)

### *They are everywhere*

Cabot products are found in major supermarkets across the country and can be purchased directly from Cabot's website. They also maintain a retail location in Vermont (Cabot Farmers' Store) which sells other local Vermont products in addition to Cabot's offerings.

### *They connect with people*

According to their website, the Cabot newsletter reaches over 333,000 people direct to their inbox. They also maintain a strong presence on Facebook, Instagram, Twitter, Pinterest, YouTube, and LinkedIn.

### *They use their success for greater impact of their mission*

Cabot looks to impact the greater community's health and well-being with website sections entitled Department of Gratitude, Healthy Us, Youthful Matters and Cooking with Kids. Cabot also publicly supports causes such as education, health, and public broadcasting, and youth scout organizations. Additionally, Cabot participates in special events, partnerships with fellow co-ops and B Corporations, and volunteering opportunities.

SURVEY: PROMOTIONAL CHANNELS	
Website	✓
Facebook	✓
Instagram	✓
Twitter	✓
Pinterest	✓
YouTube	✓
Vimeo	✓
Emails/Newsletters	✓
Online ads in search engines (e.g., Google, Bing)	✓
Online banner ads on other websites	✓
Ads in online newspapers, magazines, blogs	✓
Ads in print newspapers or magazines	✓
Booths at community events/festivals	✓
Booths at food expos or trade shows	✓
Enter products into food awards competitions	✓
Sponsorship of local organizations (e.g., little league)	✓

SURVEY: SALES CHANNELS	
Ecommerce on our website	
Ecommerce via another independent retail website	✓
Online at large retail website (e.g., Amazon)	✓
A store on our farm or property	
A store on someone else's farm	✓
Direct at local farmers markets	
Our own store at a retail location	✓
Direct to local retail stores	✓
Direct to local restaurants/hotels/institutions	
Direct to non-local stores in my state	✓
Direct to regional stores in the Northeast	✓
Direct to regional stores nationally	✓
Via distributor to local stores, restaurants, hotels etc.	✓
Via distributor to non-local stores, restaurants, hotels etc. in my state	✓
Via distributor to stores, restaurants, hotels etc. in the Northeast	✓
Via distributor to stores, restaurants, hotels etc. nationally	✓
Home delivery using our own vehicles	

SURVEY: AGRITOURISM	
Offer tours of processing facility	
Have a store on the farm	
Have lodging for guests (e.g., bed and breakfast)	✓
Part of a "farm/dairy trail" type offering	✓
Guests can participate in processing products	
Dedicated tasting opportunity on site	✓
Local farm to table	

SURVEY: IN-HOUSE OR PROFESSIONAL?	WE DO	HIRE A PRO	DON'T DO
Logo Design	✓		
Website Design	✓		
Website Upkeep	✓		
Packaging Design	✓		
Social Media Posts	✓		
Advertising	✓		
Booths at Food Shows	✓		
Booths at Farmers Markets	✓		
Search Engine Optimization	✓		

## How they tell their story (branding)

### Web site and story

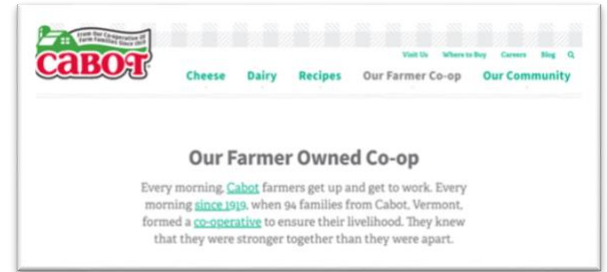
Cabot’s website is professional and extensive. The initial focus is on the cheese and other dairy products they produce and where to find them, featuring an easy-to-use product locator tool. An enormous recipe section aimed at customers of all types is organized by occasion, Cabot ingredients, cooking methods, dietary restrictions, and cuisine types.

Second only to information about its products, Cabot’s website provides in-depth write-ups highlighting their long history, the farmer-members, the features that make the co-operative model special, and the importance of its mission. Section topics include farm families, farm animals, environmental stewardship, the products, and further information about co-op structure.

The website’s blog has a heavy focus on the co-operative mission and giving back to the community. Its content is divided in five categories: Co-Operative, Food, Fun, Gratitude, and Health & Education. Recent pieces address topics such as the importance of pollinators and how to compost, a focus on women farmers, and healthy recipes.

### Logo and packaging

Cabot’s logo is a nice encapsulation of their *corporate-advocate* story. The use of the single word “from” recalls a direct farm-to-customer transaction and the remaining text includes a mention of the co-operative structure, Cabot’s long history since 1919, and the importance of farm families. A green barn and red text with plaid accents catch the eye in a simple, traditional, New England country style.



SURVEY: WORDS THAT DESCRIBE OUR LOGO	
Humorous/Funny	
Serious	
Realistic	
Cartoonish	
Fun	
<b>Friendly</b>	✓
Vintage	
Old-Fashioned	
Classy	
Artisan	
Rustic	
Botanical/floral	
<b>Natural</b>	✓
<b>Traditional</b>	✓
Artistic	
Clean	
<b>Simple</b>	✓
Boutique	
Modern	
Wholesome	
Healthy	

## Why we like Cabot Creamery as a case study

Cabot Creamery is one of the best-known dairy brands in the U.S. and so has options as to what story it chooses to tell. From our point of view, they tell a *corporate-advocate* story in its purest form; that is, they leverage their exposure to communicate an image about dairy farming that is tied to the land and tied to a cooperative and supportive of a supply chain in the form of small farms and farmers, and they position themselves as a leader in this humanistic enterprise.

SURVEY: INTENTIONAL MARKETING MESSAGES	
<b>Our family to your family</b>	✓
<b>Generations of farmers</b>	✓
<b>We take good care of our cows/goats/sheep</b>	✓
<b>We take good care of the land</b>	✓
<b>We support the local community</b>	✓
Small family farm	
<b>Local farm to table</b>	✓
<b>Fresh</b>	✓
No antibiotics/rBGH/additives	
<b>Simple ingredients</b>	✓
<b>Highest quality/pure</b>	✓
<b>Nutritious</b>	✓
<b>Better tasting/delicious</b>	✓
<b>Local flavor or character</b>	✓
<b>Trusted neighbor</b>	✓

# Marketing and Branding Toolkit



# Marketing and Branding Toolkit for Small Dairy Processors in the Northeast U.S.

Guide and Resources

June 2022

the  
**goodpeople**research  
company™

**NORTHEAST** **DAIRY BUSINESS  
INNOVATION CENTER**

## Table of Contents

<b>Introduction .....</b>	<b>1</b>
<b>THE GOAL OF MARKETING AND BRANDING .....</b>	<b>1</b>
“Marketing” is when you pave the way to sell your products in the marketplace .....	1
“Branding” is when you position your company in the consumer’s mind – you communicate “who you are” ..	1
Marketing and branding are “cyclical” endeavors – they are ongoing.....	2
<b>The Foundation: What do you think is important?.....</b>	<b>2</b>
What is your <i>vision</i> ? .....	2
What is your mission? .....	3
What are your <i>values</i> ? .....	3
<b>Learn from what your peers do.....</b>	<b>3</b>
<b>Understand what consumers think is important.....</b>	<b>3</b>
<b>The organization of this Toolkit.....</b>	<b>4</b>
Phase 1: Getting noticed .....	4
Phase 2: Helping customers define your brand .....	4
Phase 3: Getting customers to use your products and experience your brand .....	4
Phase 4: Inspiring customers to promote your brand .....	4
<b>Phase 1: Getting Noticed .....</b>	<b>5</b>
<b>Promotional Channels .....</b>	<b>5</b>
<a href="#">Best Practices</a> .....	5
Website .....	6
Social Media .....	6
Newsletter .....	7
Local Media – Press Relations .....	7
Co-Promotion with Other Farms & Businesses.....	8
Signs and displays.....	8
Agritourism.....	8
Sponsorship .....	9
Advertising.....	9
Awards – Competitions .....	9
Buyer Shows .....	10
<b>Phase 2: Helping customers define you .....</b>	<b>11</b>
<b>Know and be yourself.....</b>	<b>11</b>
Learn how to talk about your vision, mission, and values in different circumstances .....	11
Develop a Tagline .....	12
Have an Elevator Pitch ready at all times.....	12
Keep a One-Pager/Paragraph on hand for press or publicity opportunities .....	13
Translate your story into images and/or video to supplement your main storytelling.....	14

A note about what consumers want to hear.....	16
<b>Phase 3: Getting customers to use your products.....</b>	<b>20</b>
<b>Retail Channels .....</b>	<b>20</b>
Online – Ecommerce on your website .....	20
On Farm - The Farm and Farm Stands.....	20
Off-Site Retail Stores .....	21
Farmers Markets .....	21
Home Delivery .....	22
Community Supported Agriculture (CSA) .....	22
Restaurants.....	23
Distributors and Wholesale.....	24
Grocery Stores .....	26
Schools & Institutions.....	27
<b>Phase 4: Inspiring customers to promote your brand .....</b>	<b>28</b>
Continue authentic storytelling.....	28
Engender Rapport and Support.....	29

# Introduction

As a dairy processor in the Northeast U.S., you have a series of choices to make as you go to market and brand your company. There's no one way to position your company for profit, growth, and sustainability; how you go about it depends on your individual situation and aspirations.

Who are you, and what do you want to be? What is special about your company, and why should consumers or your community care? These are the essential questions to explore when deciding how to approach marketing and branding.

In this Toolkit, we will walk you through this process of exploring and identifying the story you will want to tell in the marketplace, and suggestions for how to tell that story, as well as how to get your products in front of consumers and popularize them most effectively.

## THE GOAL OF MARKETING AND BRANDING

“Marketing” is when you pave the way to sell your products in the marketplace

In this toolkit we use the term “marketing” to encompass the steps taken to display the company’s products and get them into the market to make sales. These steps may include, but not be limited to, advertising, promotion, relationship building, social media interaction, and distribution through farmers’ markets, farm stores, online stores, and traditional distributors.

“Branding” is when you position your company in the consumer’s mind – you communicate “who you are”

We define “branding” here as the steps taken to communicate an image of the company, which may include the design of the company’s logo and promotional materials, including the company’s website, as well as the language and storytelling the company uses to describe the distinctive role the company feels it plays in the marketplace or community.



Marketing and branding are “cyclical” endeavors – they are ongoing

When a consumer-facing company markets and brands itself successfully, its brand passes through four key thresholds:

- *Awareness*, when it is **noticed** by consumers;
- *Assessment*, when it is **defined** in the consumer’s mind;
- *Use*, when the consumer **uses** or **consumes** or **experiences** the brand and its products; and
- *Advocacy*, when the consumer feels strongly enough about the value of the brand that they **promote** it to others so they will experience it and, in turn, promote it further.

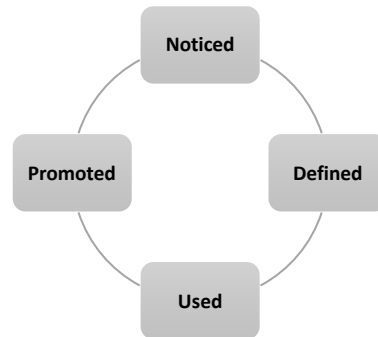


Figure 1: Brand lifecycle in marketplace

This phased process characterizes the real life experience your company and brand has in the marketplace. It forms a cycle that is constantly evolving based on the conscious decisions you make about how you want to present your company and the experience consumers will have with your products. You can help consumers notice, define, use, and promote your products and your company. Each phase feeds the subsequent phase and starts the cycle all over again.

The Foundation: What do you think is important?

To help make the marketing and branding cycle work for you, your company’s marketing and branding need *intention* and *direction*. Before you do anything, you should be able to answer the following questions clearly and succinctly (you might want to write them down):

What is your *vision*?

This is the “why” you do what you do. It’s how you see the world and what you think is important about your purpose and role in it.





### What is your mission?

Based on your vision, this is what you do, how you do it, and whom you do it for. Your mission statement follows this pattern: We \_\_\_\_ by \_\_\_\_ for \_\_\_\_\_. To integrate your vision into this statement, you could add: We \_\_\_\_ by \_\_\_\_ for \_\_\_\_ *because* \_\_\_\_\_.

(Below in this toolkit, you will find a detailed discussion of how to tell a clear story about your brand. Ultimately, this story begins with an understanding of your *vision* and *mission*.)

### What are your values?

This is what defines what you will do and what you won't do as a business, and what you decide to promote.

How big you want to grow and what kind of life you want will drive what approach you take to and how much you invest into getting noticed, having people try your products, and how to get customers to promote you.

You don't have to, nor may you want to, do everything that is presented in this toolkit. The outline and resources provide a guide and are there to make you aware of the possibilities should you want to make changes to how you structure your business and/or lifestyle.

### Learn from what your peers do

You can learn from peers, especially ones that have been around for some time and have found ways to establish a clear brand in the marketplace. We reviewed more than 135 dairy brands in the northeast and reduced them down to 12 case studies we offer in a document that accompanies this Toolkit.

### Understand what consumers think is important

Before you read through this toolkit, it's important also that you have a frame of reference for what your potential customers may look for in a dairy product and brand. In preparation for developing this toolkit, our research team surveyed 750 consumers, mostly in the northeast, about their dairy purchasing patterns, preferences, and perceptions. We cover some of the more salient findings from this survey in the second section, "Phase 2: Getting Defined," below.



### The organization of this Toolkit

The following will outline steps to take to move your branding along the four phases discussed above (see Figure 1) a moment ago and outlined again in Figure 2 below. For each section, you will find an explanation, best practices, and a list of resources that may help in each of these phases.

#### Phase 1: Getting noticed

In this section, we review the types of promotional activities your peers engage in to get their brand name in front of consumers and any partners that may help build their customer base (e.g., other farm stores, groceries, etc.)

#### Phase 2: Helping customers define your brand

In this section, we walk you through how to tell your story, one that reflects your mission and vision.

#### Phase 3: Getting customers to use your products and experience your brand

In this section, we catalog the different types of channels for distributing and selling your products – getting them in the hands of customers. These can range from channels you control completely like your website, farm store, or delivery trucks (if you have these) to ones you partially control or don't control, like retail stores, distributors, and resellers.

#### Phase 4: Inspiring customers to promote your brand

In this section, we review the types of promotional activities your peers engage in to get their brand name in front of consumers and any partners that may help build their customer base (e.g., other farm stores, groceries, etc.)

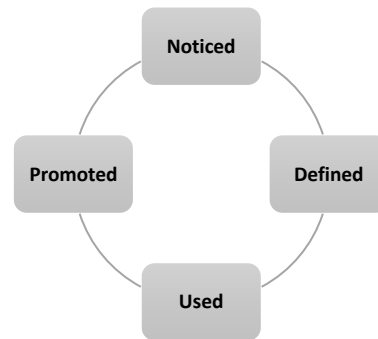
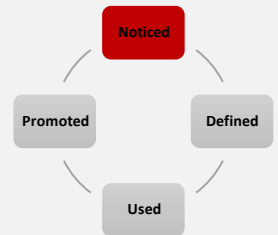


Figure 2: Toolkit organization protocol



## Phase 1: Getting Noticed

The first obvious part of having the world discover and experience your products and brand is to make them aware of it. In this section, we review the main promotional channels you likely have available to you and tips on accessing and using them.

### Promotional Channels

- Website
- Social Media
- Email Newsletter
- Local Media and Directories
- Business to Business Co-Promotions
- Signs and Displays
- Agritourism
- Sponsorship
- Advertising
- Awards/Competitions
- Buyer Shows

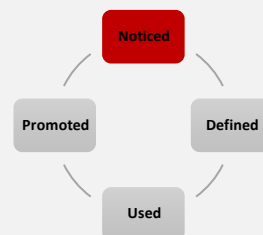
### Best Practices

- Save yourself time and work right up front by laying out a monthly calendar of all your marketing and messaging. This is where you'll plan all your social media posts and content, newsletter dates, product pricing and wholesale sheet updates, and advertising deadlines. It'll take you some time to set it up, but it'll save you time and this template will be easy to keep using each month.
- Make sure all your marketing ties together. Don't have a different message for Facebook than you do for your newsletter. You can use each channel to connect people to your other channels, such as asking people who receive your newsletter to like and follow you on Facebook.



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 1: Getting Noticed



### Website

Do I really need a website if I'm on Facebook and Instagram? Yes! Your site may be the first impression you make on a potential customer, so make sure it reflects well on you, your farm or operation, and your brand. Make it easy for your customers to find out about your products, how to reach you, and where to buy them. Your website can be expanded to provide an online shop, focusing first on local pickup and delivery, and eventually more widely on regional and nationwide shipping. Don't forget to keep it up to date - nothing sends a worse signal to customers than encountering outdated information.

### Website Building Resources

There are many options for building a website, including hiring someone to build it for you. However, it is getting easier and easier to create your own professional websites, including ones with e-commerce capabilities. Here are a few of the many sites that provide this service.

- [squarespace.com](https://www.squarespace.com)
- [wordpress.com](https://www.wordpress.com)
- [wix.com](https://www.wix.com)
- [godaddy.com/websites/website-builder](https://www.godaddy.com/websites/website-builder)
- [zyro.com](https://www.zyro.com)
- [weebly.com](https://www.weebly.com)

### Social Media

#### Facebook

While Instagram is the hot new social media site, plenty of folks still go to Facebook first. Make sure to create a business Facebook page and update two to three times per week. To save time, link your Instagram posts to your Facebook page and get 2-for-1! Don't forget to reply promptly if anyone comments on your post or contacts you via Facebook.

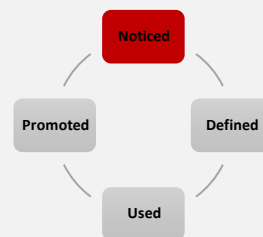
#### Instagram

If you must pick one, Instagram is the place to start! Instagram is image-focused, so get busy taking pictures of your beautiful farm, cute animals, delicious products, or people enjoying them. Pro tip: save time by linking your Instagram account to your business Facebook page. When you post on Instagram, it'll post the same thing on Facebook instantly.



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 1: Getting Noticed



### Additional Resources: Social Media and Digital Marketing

- <https://www.udemy.com/courses/marketing/>
- <https://www.udemy.com/course/local-digital-marketing>
- <https://digitalmarketinginstitute.com/students/courses>
- <https://blog.hubspot.com/marketing/social-media-marketing>
- <https://neilpatel.com/what-is-social-media-marketing/>
- <https://coschedule.com/blog/how-often-to-post-on-social-media>

### Newsletter

Offering a newsletter sign-up to your customers keeps them in the loop and offers you opportunities to reach out to them on a regular basis. You might offer news of special events, coupons, and even recipes. Depending on the size of your business and your customer base, newsletters can go out weekly, bi-weekly, monthly, or quarterly and can vary with the season. Make sure people can sign up for your mailing list via a button on your website, Facebook or Instagram page, and even on a paper sheet at the farmers' market. A free online newsletter software program such as [MailChimp](#) makes creating a good-looking newsletter simple with pre-made templates.

### Newsletter Resources:

[mailchimp.com](http://mailchimp.com)

[flodesk.com](http://flodesk.com)

[sendinblue.com](http://sendinblue.com)

<https://www.canva.com/create/newsletters/>

[constantcontact.com](http://constantcontact.com)

[The Ultimate Guide to Email Marketing](#) - Hubspot

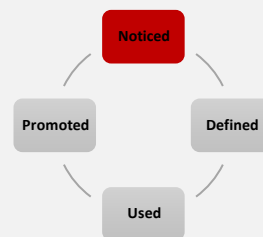
### Local Media – Press Relations

Don't forget to reach out to your local media if you have a special event or new product to introduce. This can include newspapers, television stations, or radio - even local food bloggers. These folks are always looking for content and good local stories.



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 1: Getting Noticed



Doing some (or all) of the work for them is helpful - learn to write a good newsworthy press release. Look for fun and natural occurrences to highlight, such as your anniversary of 10 years in business or serving your 1,000th customer. Let them know if you have recently won an award. You get the idea.

Becoming a member of your local Chamber of Commerce, Tourist Board, or other business group is another way to increase your prominence in the community. Networking at these group events will bring you into contact with local media and other businesses who could partner with you.

### Co-Promotion with Other Farms & Businesses

Look for opportunities with other local businesses to do co-promotional events. It could be as easy as inviting a food truck on your farm on a day when you're having a special event. It could be a wine and cheese-pairing event with a local winery (or brewery). Restaurants are another great option; see more about working with restaurants below.

### Signs and displays

To be eye-catching and draw people to your farmers market booth or farm store, you'll need to have some good quality, professional signage made featuring your name and logo. Local print shops can help, and national brand stores like Staples provide sign design and printing services.

Online options such as [canva.com](https://www.canva.com) can help you create marketing materials that are consistent across assets, from business cards to banners. Canva can even guide you through creating Instagram and Facebook stories.

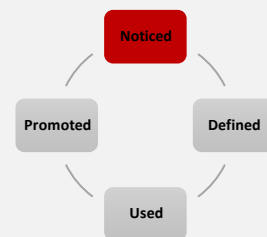
### Agritourism

Agritourism allows you to reach a new audience in the most direct way possible - face to face! You are hosting them in your "home," so make it welcoming with signage, clean bathrooms, friendly staff, and clearly designated parking. Look for local "artisan trails" that you can join, including getting listed in a local or regional tourism directory. Reach out to hotels with brochures and establish an on-going listing in local weekly papers.

Inviting people to your farm for special events, tours, and tastings introduces them to you, lets them see your operation, taste your products, and meet your animals. It can work with tourists and locals alike. You



### Phase 1: Getting Noticed



can target all kinds of different groups - think a happy hour crowd for wine and cheese or invite young families to meet the year’s new calves or lambs. Experiential interactions like this (both good and bad!) stick in the mind of the customer for much longer than a brief interaction at a market, so be sure to make a good impression.

### Sponsorship

Sponsorship is another way to get your product and business out in front of people while also demonstrating your support of the local community. It could be a charity walk or run, a little league or soccer team, or school fundraiser. Staffing a booth or providing free samples of your products at the event is another great way to extend your reach.

### Advertising

Some well-placed advertisements can successfully get the word out to your customer base and introduce your products to new customers. It helps to know who your typical customers are so that you can better target them, and people like them.

Start small with your local newspapers or radio stations, or specialty local and regional magazines focused on tourists.

Advertising on Facebook, Google, and other social media sites is another way to reach a target audience. Your posts will show in the feeds of people who like your business, so start with reaching out to “friends of friends,” or select customer ages and geography. It’s also a good idea to look at the resulting data collected by these sites to find out how many people clicked on your ad, visited your site, or took advantage of a coupon or special offer you made. Then expand on what’s working!

### Awards – Competitions

Even if your footprint is local, gaining recognition from national or international organizations raises your profile and enhances your brand. Independent, third-party affirmation of the quality of your product is powerful. Search for competitions that have entry requirements you can meet and that are respected by your peers.

Here are some to give you an idea:

[Specialty Food Association - “sofi” awards](#)

[Good Food Foundation Awards](#)

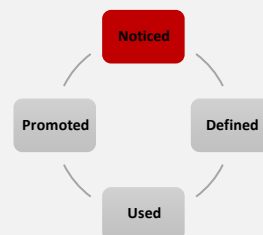
[American Cheese Society | Judging & Competition](#) - includes categories for butter





## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 1: Getting Noticed



[US Dairy Sustainability Awards](#)

[World Cheese Awards - Guild of Fine Food](#)

[World Championship Cheese Contest](#)

[World Dairy Expo Championship Dairy Product Contest](#)

State-Level Awards

<https://mainecheeseguild.org/>

[New England Green Pastures Award](#)

### Buyer Shows

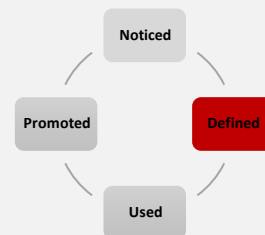
If you are looking for a distributor or want to connect with buyers from institutions who may want your products, you can connect with them at trade show devoted to business-to-business exposure and education. Examples of this type of show are ones The Specialty Food Association hosts -- the Summer and Winter Fancy Food Shows in New York City and Las Vegas. There are other national and regional trade shows you can sign up for. These shows are often also good for understanding what your peer dairies are doing in terms of new product and promotion, and you can often attend educational sessions as well. Some examples:

[Summer Fancy Food Show](#)

[Local Food Trade Show of New England — SBN Sustainable Business Network](#)

There are many opportunities a small business can access. The ones you choose to make use of will depend on your time, budget, and the quality of each that is local and accessible to you. The key is to plan and consider the combination of promotional opportunities that works best for you.





## Phase 2: Helping customers define you

Once you've gotten your customers' attention – they've seen your brand advertised, came across you on Instagram, or found their way to your website – you have the chance to tell them your story. This story, whether conveyed in word, images, videos, or all three, is the primary way your customers will decide whether your brand, among the many out there, should get their further attention and, hopefully, support. This is where you engage the customer and hope that they connect emotionally with your products and brand.

How you tell your story is a critical piece to your branding; it is the most powerful thing you can control when it comes to how your brand will be thought of.

In this section we provide a guide to telling the story you want others to spread about you.

### Know and be yourself

The first thing that's important in helping consumers define who you are is to be sure of it yourself. We mentioned in the introduction that having intention and direction in your marketing and branding is paramount.

Learn how to talk about your vision, mission, and values in different circumstances

#### One sentence each:

**Vision:** We are \_\_\_\_\_ with a goal of \_\_\_\_\_.

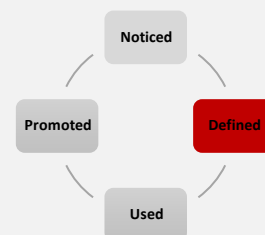
**Mission:** We \_\_\_\_\_ for \_\_\_\_\_ by \_\_\_\_\_.

**Values:** We believe \_\_\_\_\_ are essential to accomplishing our mission.



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 2: Getting Defined



### Example:

*We are a small family dairy with a goal of preserving our beautiful countryside for future generations. We make pure, delicious milk and ice cream for families in our community by using only the finest ingredients and the most skilled cheese artisans. We believe that if we keep our animals happy and fiercely protect the land they graze on, your culinary experience with our products will be more satisfying.*

These statements of vision, mission, and values can be relayed separately, or can be joined together.

There are different circumstances when you will want to tell your story but are afforded different degrees of space in which to do it in the context of different promotional opportunities. Below, we outline the most common scenarios, and how a description of your company and products may differ: the *tagline*, the *elevator pitch*, and the *one paragraph/one pager*.

### Develop a Tagline

Describe your business in one short sentence or less. This may accompany your logo, or it may be required for a social media profile like Instagram.

- Jasper Hill Farm, Vermont: *A Taste of Place*
- Arethusa Farm, Connecticut: *Milk Like it Used to Taste*
- Turner Dairy Farm, Pennsylvania: *Quality You Won't Find Anywhere Else*

### Have an Elevator Pitch ready at all times

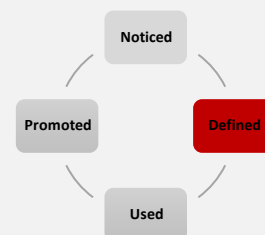
You have 30 seconds to describe your business – what you do and WHY you do it. Typically, your story explains a problem you solve or a need you fulfill, for whom, and how you do it. Why you do it makes it compelling. (Usually, 1-2 sentences...expanding on the tagline language)

- We're a small cheesemaking company in Pawlet, VT that hand-makes artisanal, small batch cheese from local milk, with an aim of continuing the traditions originally established in the 1800s.
- Jasper Hill is a working dairy farm with an on-site creamery in the Northeast Kingdom of Vermont. An underground aging facility maximizes the potential of cheeses made by the creamery, as well as those made by other local producers. Leftover whey from the cheesemaking process is fed to heritage breed pigs, roaming the woodlands beyond the cows' pasture.



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 2: Getting Defined



- Since 1930, Turner's has been producing the freshest, best tasting dairy products right here in Western Pennsylvania.
- Established in 2000, Blue Ledge Farm is a first generation, family owned and run goat dairy and cheese-making operation. Our mission is to create a high-quality product built on the cornerstones of respect for consumers, land, and animals as well as our local community.

### Keep a One-Pager/Paragraph on hand for press or publicity opportunities

You've been asked to write two paragraphs about your business for your local newspaper (expand on your elevator speech language)

#### From Turner Dairy Farm, Pennsylvania:

*Local Agriculture is the heart & soul of what we do – Turner's partners exclusively with 35 local, family dairy farms within 70 miles of our processing facility. Our farm partners are endlessly dedicated to healthy, happy cows and sustainably cultivating their land. All Turner's milk and dairy products are free from antibiotics and artificial growth hormones (rBGH).*

*Turner's has earned more than 100 awards for taste and quality at national dairy product competitions since 1998. In 2021, Turner's became the first Pennsylvania Dairy to extend their shelf life for fresh milk and cream beyond previous government mandates. Turner's shelf-life extension is verified by 3rd party quality testing and approved by the Pennsylvania Department of Agriculture.*

*We hold ourselves to a higher standard of quality has always been at the forefront because we believe your family deserves it.*

#### From Blue Ledge Farm, Vermont:

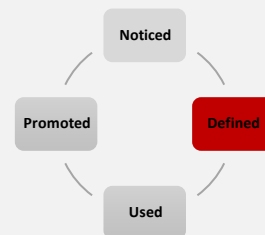
*At Blue Ledge Farm we believe in a food system that is based on a cornerstone of respect for the land, the animals, and the consumer as well as our local community. We celebrate the opportunity to raise healthy, contented animals and make great cheese!*

*Blue Ledge Farm began as a dream in Florence, Italy where Greg and Hannah met while studying the art and culture of Europe. In 2000, at the tender age of 23, the two began the work of*



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 2: Getting Defined



*transforming an old cow dairy farm back into production with goats. The barn which once housed seventy Holstein cows would now be home to their Alpine and LaMancha dairy goats. We began milking four goats at Blue Ledge Farm and began processing cheese two years later. Today we milk over one hundred goats and produce eleven types of cheese (described on our Cheese page), from very fresh to semi-aged bloomy rind cheeses, to harder cheeses aged three months. True to our mission, our focus is always on sustaining a high-quality, consistent product with lots of attention and gentle handling.*

*The 150 acres of Blue Ledge Farm consist of woods, hayland, pasture and wetland. In 2004 we financed our cheese room construction by selling our development rights to the Vermont Land Trust, thereby ensuring that our land will always be open and never developed. In 2009, wetlands were identified as one of our great natural resources and so we agreed to conserve our fifty acres of wetland and return them to their natural state as a valuable part of our ecosystem. Our goats spend their spring, summer and fall days browsing in the woods, return to the barn for 4 pm milking and lounge around in a grass pasture as evening sets. Our goats live a life of luxury and as we run from job to job across the farm, we sometimes wonder who works for who!*

*When Greg and Hannah aren't milking goats or making cheese, they can be found in their painting studio. Check out Greg's oil paintings [here](#) and Hannah's [here](#).*

### Translate your story into images and/or video to supplement your main storytelling

People learn differently. Some people are primarily *auditory* – they learn best by hearing or reading; some are primarily *visual* – they learn best by seeing images, charts, and diagrams. Still others are primarily *kinesthetic*, they learn best by experiencing or feeling. The more ways you can communicate a consistent story, the better the chance that you will connect with a customer. Here are a couple examples:

#### Blue Ledge Farm (Vermont) logo:

Blue Ledge Farm ([blueledgefarm.com](http://blueledgefarm.com)) created a logo that tells a story of its business using a simple image and a simple message. While they make cow's milk cheese, their primary focus is on goat's milk; the logo features two goats together on a "ledge" and the use of a distinctive blue reinforces the "blue" in the company name at the same time it evokes a joyful impression of a sunny blue sky, and happy animals. The logo does a good job of symbolizing the experience the consumer has with the Blue Ledge website and other iterations of the brand experience (e.g., packaging).

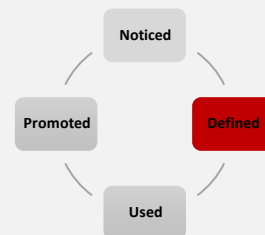


Figure 3: Blue Ledge Farm logo



Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 2: Getting Defined



Jasper Hill Farm (Vermont) video:

Jasper Hill Farm ([jasperhillfarm.com](http://jasperhillfarm.com)) presents a documentary style video on the “About” page of its website (<https://www.jasperhillfarm.com/about>). It’s professional, it tells the story of the business from the point of view of its founders and gives the viewer a bit of a tour of the farm and the cheese making process.

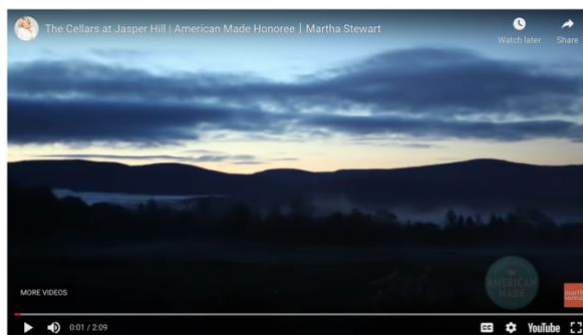


Figure 4: Image of Jasper Hill Farm video

Many dairy processors have similar videos on their sites with varying degrees of professional polish. The Jasper Hill Farm example is professionally produced, but in many instances, less polished video is as or more effective in that it reinforces the character of a small, local, and possibly “pure,” enterprise.

Arethusa Farm (Connecticut) timeline:

Arethusa Farm ([arethusa.com](http://arethusa.com)) is a relatively modern brand (20+ years) of milk, cheese, butter, and ice cream. The current owners who purchased the farm in 1999 create an image that honors the history of the farm which dates to 1868. To reinforce the blend of old and new, the company uses a traditional looking logo and features, on the “About” page of its website a colorful timeline chronicling the evolution of the farm from 1868 to the present.

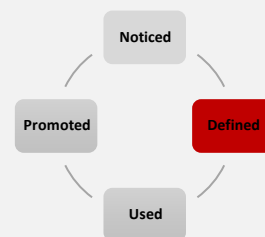


Figure 5: Partial image of Arethusa Farm “timeline” from its website



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 2: Getting Defined



### A note about what consumers want to hear

It's important to keep in mind that not all consumers are alike and that some will be more likely to find your brand appealing than others. This comes down to personal preference and values; you should not, and likely do not, take this personally. The more “authentic” you are in your practices and storytelling, the more focused will your core customer group likely to be.

The most important takeaway from this phenomenon is that you should focus on the consumers that are most likely to be your customers and pay attention to their preferences and needs. This will reinforce your brand appeal and others who may be attracted to your product and message will take note.

Get to know your core customers as well as you can, either through personal interactions, social media, or, if you can, sending out an occasional survey or request for feedback.

Below, we share some discoveries we made from a survey we conducted in June 2022 with 750 consumers (aged 18+), with an emphasis of those who live in the Northeast region of the U.S. The patterns that emerge from our survey data suggest that those who typically shop outside of the main chain grocery stores (approximately 20% of consumers), and are in the Northeast region, place significantly greater importance on a brand being local and on the “story” the brand tells than those who typically shop for dairy products in chain grocery stores.

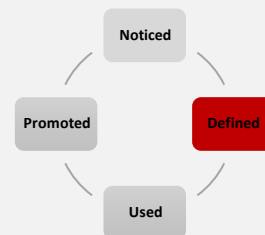
See Figures 6-10 below for some insight into how your likely customers think about dairy products:



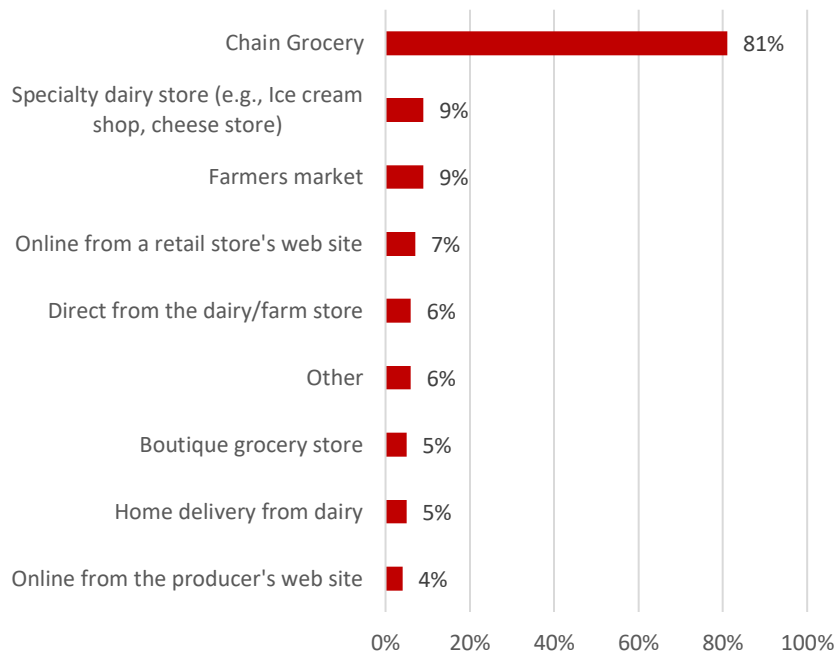


## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 2: Getting Defined



### Where do you typically buy dairy products (Select all that apply.) (n=750)



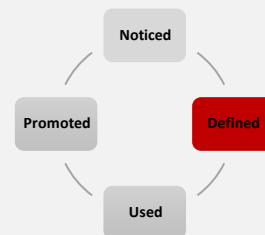
The approximately 20% of consumers who report they typically buy dairy products outside of chain grocery stores are most likely your core potential customer. These shoppers report that they buy dairy products direct from dairies, and/or farmers markets, and/or through home delivery, among other means.

Figure 6: Source: The Good People Research Company survey of consumers, June 2022 (n=750)



Marketing Toolkit for Northeast U.S. Dairy Processors

Phase 2: Getting Defined



Importance of Producer's "Story" When Purchasing Dairy Products – Consumer (n=750)

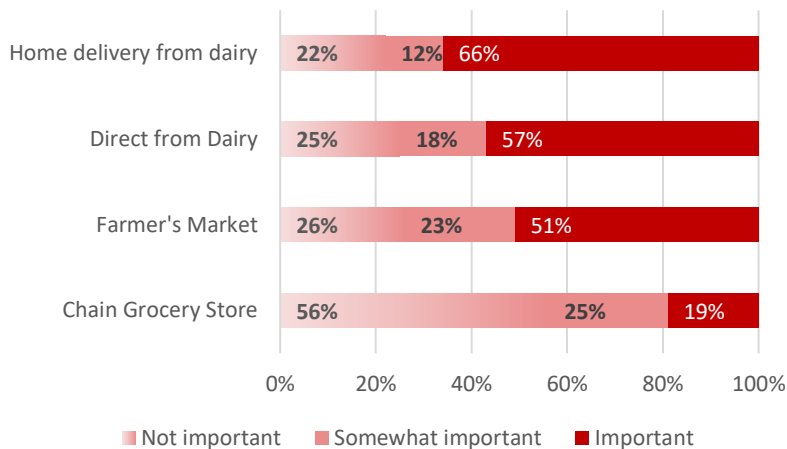


Figure 7 to the left suggests that those who report they tend to buy dairy products outside of chain grocery stores find the “story” behind the dairy and product important at a significantly greater rate than those who report they typically buy from a chain grocery store.

Figure 7: Source: The Good People Research Company survey of consumers, June 2022 (n=750)

Importance of Dairy being "local" - Consumers (n=750)

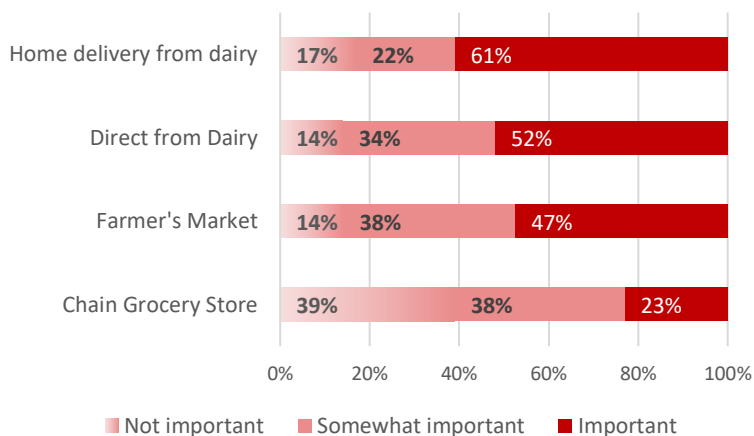


Figure 8 to the left suggests that those who report they tend to buy dairy products outside of chain grocery stores find the dairy producer “being local” is important at a significantly greater rate than those who report they typically buy from a chain grocery store.





Marketing Toolkit for Northeast U.S. Dairy Processors

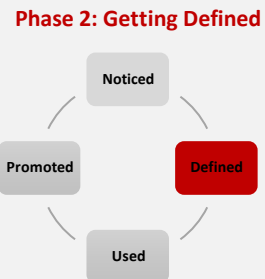


Figure 8: Source: The Good People Research Company survey of consumers, June 2022 (n=750)

Consumer Report of Preference for Word Use on Dairy Products (n=750)

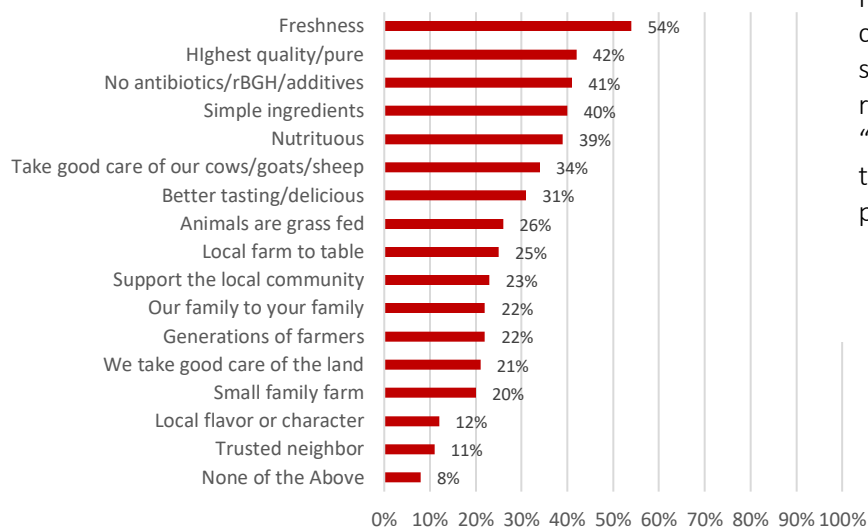
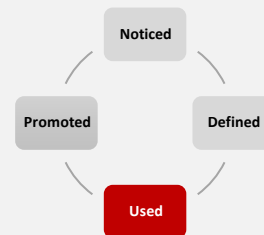


Figure 9 to the left suggests that consumers – who shop in chain grocery stores as well as those who do not – report that “freshness,” “quality,” “purity,” and nutrition are foremost on their mind when evaluating dairy products.

Figure 9: Source: The Good People Research Company survey of consumers, June 2022 (n=750)

What we learn from the information above is that the story you tell about your business is important, and the story should be local and should emphasize freshness, quality, purity, and taste above other product features. *The “story” itself likely functions to reinforce the notion of freshness and quality; that is, it makes the claim of freshness, purity, and nutrition more immediate and believable.*



## Phase 3: Getting customers to use your products

Ok, customers have heard about you and are intrigued by your story. Or maybe they have not heard about you yet. At this point, you need to make it as easy as possible for customers to get and try your products and experience your brand in the context of enjoying your products – the emotional tie they will make between brand and product if the experience is enjoyable (which we’re sure it will be!).

In this section, we outline the different sales channels most likely available to you. These channels are literally how you get your products into the hands of consumers so they can experience your product and hopefully become lifelong customers.

### Retail Channels

#### Online – Ecommerce on your website

One of the increasingly common direct methods of selling to consumers is the online catalog – the ability to display your products online. Many website platforms such as Squarespace.com, Wordpress, and Wix.com have modules that enable you to present your products and collect payments online. For some products, and for companies that don’t have vehicles to make delivery on their own, shipping may be expensive and add considerable cost to each order. For many dairy producers, however, selling your products online to an audience that is increasingly comfortable with buying food products online is worth exploring.

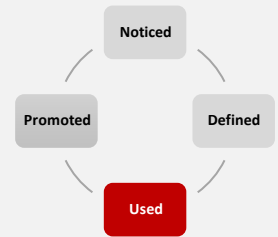
#### On Farm - The Farm and Farm Stands

Inviting customers to your farm for tours, special events, or to purchase products is a great way to reinforce your authentic story and brand - people can see for themselves exactly how you steward the land, care for your animals, or make your products.



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 3: Getting Customers



Tours can be offered on your schedule, including by appointment, and special events can be scheduled well in advance, so you'll be prepared with staffing and a stock of products and merchandise for sale. Events focused on holidays and seasonal or new product offerings and flavors make sense, but if you have baby animals, also consider inviting customers to come out to see them!

- Advertise your farm store with large readable signs. Make sure to include prominent signs that indicate your hours as well as when you are "open."
- List your farm store in any farming directories or guides, or any promotional tourist-focused "trails."
- If you are inviting people to come for tours or to spend time at your site, provide a clean site with parking, restrooms, rules, and prices clearly outlined.

### Off-Site Retail Stores

For companies that have their own farm stores, and especially those that don't, selling your products through another company's farm store is a viable option, particularly if your products complement theirs and can enhance the customer's experience at their store. Research other farm stores in and outside your area to see if you can contribute to their offerings and create a win-win.

Some companies also can establish retail shops away from their farms. Consider how possible this might be for you. It has the twin effect of providing an additional selling channel at the same time it considerably expands a company's ability to market and brand to a larger audience.

### Farmers Markets

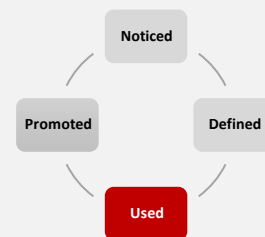
Selling your products at farmers markets can be a good way for a new or growing business to establish your brand and begin creating a loyal customer base. It's an opportunity to have customers try your products, and while they're there, add themselves to your mailing list (or follow you on social media). When you gain enough momentum, consider expanding into a CSA (your own or in combination with other vendors) or even restaurant sales.

Don't forget to bring your high-quality, professional signage to these events!



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 3: Getting Customers



#### Other tips:

- Be personable and engaging with customers
- Offer recipe or food pairing recommendations
- Put together bundles of items for sale. For example, if you make cheese, put together a bundle with crackers, jam, or local honey
- Don't forget to have a newsletter sign-up sheet available
- Collaborate with other vendors, especially the ones serving food at the market who could use your products as ingredients in/on the foods they sell

#### Home Delivery

Some dairy processors offer local home delivery services, the way milk and other dairy products were traditionally delivered. Home delivery offers a powerful way to connect directly with your customers on a weekly basis, along with a story that emphasizes tradition, community, and personal connection. It also comes with a lot of work! Setting up the service, ensuring your product keeps fresh after delivery (even if customers are not home to receive it) and running the routes year-round in all types of weather can be a real challenge. However, there are a number of dairies that are bringing this service back in a successful way.

#### Examples:

Crescent Ridge Dairy, MA  
South Mountain Creamery, MD/PA/DC/VA  
Ritchey's Dairy, PA  
Shaw Farm, MA

#### Community Supported Agriculture (CSA)

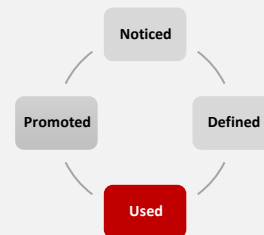
If you like connecting with your customers directly, consider trying a Community Supported Agriculture program. The primary benefit to the producer is having an infusion of cash early in the season for planning purposes. The challenge for many CSAs is coordinating weekly deliveries and keeping items cold until they are picked up.

For dairy processors that have a narrow range of products, partnering with a farm that sells a variety of produce could be a way to participate in an established CSA without "owning" it. CSA customers could



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 3: Getting Customers



add an optional “dairy share” to their delivery in the same way that local meat or flowers are often additions to the traditional bundle. Recipes or food pairing suggestions are always welcome, especially for specialty items or flavors that are new to a customer.

### Best practices

- Include a mini-newsletter or farm update with recipes with each box. Sharing this type of information helps retain CSA customers.
- Make sure customers can find all the relevant information and sign up online.
- Consider marketing to groups like businesses and neighborhood associations where you can make a single drop for multiple shares.
- Treat your CSA customers well – they are valuable!

### Local/Regional Resources

Here are a few examples of CSAs that offer dairy shares or dairy add-on shares:

- <https://gardenofvefarm.com/csa/cheese-dairy/>
- <https://thefarmbus.csaware.com/store/>
- <https://loudounfarms.org/local-produce/csa/>
- <https://www.bellairfarm.com/addon>
- <https://remembrancefarm.webs.com/dairy-csa>

### Restaurants

Depending on your product line and marketing goals, restaurants may be natural and desirable partners for you. Reaching restaurant patrons means new customers for your products and strengthening connections with local businesses is good practice. To connect with restaurants, you need to understand chefs as well as their customers. The farm-to-table movement and emphasis on sourcing fresh and local products make this a win-win partnership for both sides.

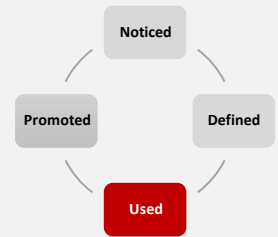
Some best practices for working with restaurants:

- Seek out restaurants that offer daily or weekly specials or seasonal menus where your products would be a good fit
- Start small by identifying a few chefs who you respect and want to build a relationship with
- “Under-promise and over-deliver” - quality and consistency are key
- Connect at the right time for the restaurant
  - Don’t drop in. Set up a time to come by for the chef to taste your samples, and bring your product spreadsheet with cost, quantity, and availability (if seasonal)



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 3: Getting Customers



- Avoid lunch or dinner service. The best times are generally weekdays between 9-11 or 2-4
- Update your product sheet as needed if your products change seasonally.
- Ask restaurants that you supply to promote your business on their menu, website, and social media by using your logo and link to your website.
- Be professional with invoicing and on-time delivery. Have a regular order deadline and delivery day established, and set up easy electronic payment options, if you haven't already done so.

### Local Resources:

#### Additional Resources:

- [Marketing Fresh Produce to Restaurants](#), University of Kentucky Cooperative Extension (2018)
- [Marketing to Restaurants | NC State Extension](#) (2010)

A great example of how a local dairy facilitates and promotes its availability in restaurants can be found on Monument Farms' website: <https://www.monumentfarms.com/#>

### Distributors and Wholesale

Food wholesalers, or distributors, act as a middleman in moving product from your farm to other businesses and institutions. Working with a food wholesaler or distributor can be a good choice if you want to move larger volumes of product. The services do come with an associated cost that many farms see as worthwhile through time saved on delivery.

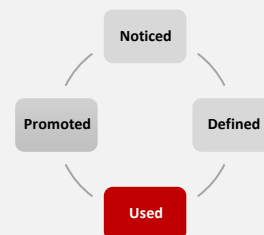
### Best Practices

- Proper documentation/food safety plan: Make sure you are certified by the state for safe dairy production and distribution.
- Packing standards & labeling: Talk to distributors about their packing standards and how they need your products labeled.
- Form a strong relationship: As with any business relationship, find out how to work best together. Plan on meeting each off-season to evaluate the season and plan for the upcoming year.
- Utilize forward Contracts when working with wholesale buyers to plan together for the season.



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 3: Getting Customers



### Local/Regional Resources

- Crown O'Maine Distribution, ME, NH, MA. <https://www.crownomaine.com/>
- Native Maine Produce & Specialty Foods. ME, NH, MA. <https://www.nativeme.com/>
- Lancaster Farm Fresh Co-op (Wholesale). PA. Make deliveries in the Northeast, Mid-Atlantic, Southeastern US. <https://lancasterfarmfresh.com/wholesale/>
- **Black River Produce**, VT, (800) 228-5481
- **Provisions International**, White River Jct VT, (802) 291-6100
- **Seacrest**, MA
- **Formaggio Kitchen**, MA
- **Saxelby Cheesemongers**, NYC
- **Food Matters Again**, NYC
- **Food Connects**, Brattleboro VT
- **Myers Produce**, Northern VT
- **Green Mountain Farm Direct**, VT
- **Dole & Bailey**, MA

### Food Hubs

As they behave much like distributors, consider participating in a Local Food Hub in your area. The organizations benefit farmers by connecting them with additional (often larger) markets, and providing services like marketing, accounting, sales, and education. Food hubs can offer a single drop-off point for multiple farmers that also serves as a single pick-up point for distributors and customers. Many focus on providing access to fresh, local foods in underserved areas.

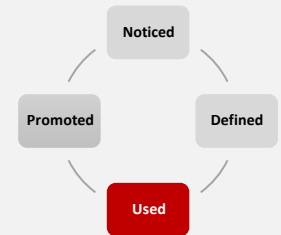
- Search for Local Food Hubs in your state here: <https://www.ams.usda.gov/local-food-directories/foodhubs>
- Search by state: <https://sustainableagriculture.net/blog/national-guide-to-finding-local-food/>
- [Eastern Food Hub Collaborative](#)
- [Farm Fresh Rhode Island](#), Pawtucket, RI





## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 3: Getting Customers



- [Food Connects](#), Brattleboro, VT
- [Three River Farmers Alliance](#), Exeter, NH

### Grocery Stores

Grocery stores can be a good market for dairy processors who can provide a larger and consistent volume of products. However, it's good to start smaller by selling directly to the public, small country stores, or restaurants before you attempt to step up to the grocery store market. Starting slow will allow you to make your production consistent and strengthen your marketing skills.

### Best Practices

- Look for grocery stores that prioritize selling local products
- When first approaching a store, find buyers in the department you want to sell to and set up an appointment. Find out whether they have goals for carrying and selling local and regional products. Bring samples, a product list for the full season, pricing, your business license, and any applicable certifications.
- Find out if they require Good Agricultural Practices (GAP) Dairy certification, other certifications, or the dollar amount of product liability insurance you must carry
- Deliver your high-quality products when promised
- Ask the buyer what packing and labeling they prefer and make sure your delivery is clearly labeled with your business name and contents.
- Develop your wholesale pricing so that both you and the market can make a profit. Aim for 35-45% lower than retail/market pricing
- Use a good, clear, professional invoicing system – track deliveries, get signed invoice duplicate and file your copy
- Be aware of the potential need for UPC coding
- Provide signage or shelf talkers that incorporate photos and/or information about the product and your farm, and ask stores to use them - catching customers' eyes will help to move your products faster

### Local/Regional Resources

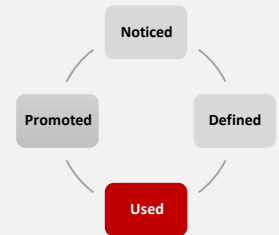
Though it's a chain, Whole Foods is known for carrying local products. Getting your products into local and regional Whole Foods stores makes for a good goal. But focus first on small local grocers and food co-ops that buy local!





## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 3: Getting Customers



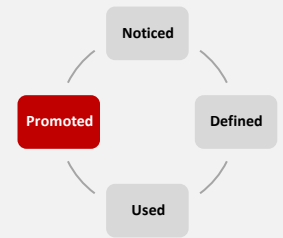
One example is the Harrisburg, PA based [Radish & Rye Food Hub](#)

### Schools & Institutions

Schools and institutions seem like natural places to sell your products, especially as schools focus on nutrition and dairy. There may also be strong interest from schools in connecting with local farms. Don't forget, though, that you must meet the scale of their demand. In return, it's a steady market. Both institutions and schools are a great way to get more connected to your community. Many schools and state and private hospitals and institutions are shifting their procurement standards to incorporate more fresh, healthy, local foods, so if your business produces on a large enough scale, it would be a good time to connect with these markets.

### Best Practices

- For schools, start by reaching out to smaller private schools over the local public school system
- Contact the school's food buyer, district child nutrition services director, or the Farm-to-School Coordinating Team
- For institutions like hospitals, senior centers, or retirement communities, contact the head chef or food services director
- Set up meetings and bring your pricing sheet as well as samples
- Dedicate time to building relationships and communicate regularly
- Depending on the school or institution, your farm may be required to carry additional liability insurance or third-party food safety certifications like Good Agricultural Practices (GAP)
- Learn about and use Forward Contracts to plan for the season with buyers

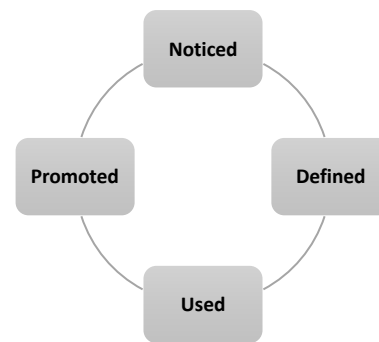


## Phase 4: Inspiring customers to promote your brand

Continue authentic storytelling

In the section we remind you that your brand follows a cycle in the marketplace. Once you've managed to get your products into the hands of consumers, it has likely happened because they noticed you and were intrigued by what you appeared to offer, that is, how the consumer "defined" you as something interesting to them.

Now you can cement a relationship with the consumer in a way that inspires them to not only enjoy your product experience, but to promote your brand to others.



Consumers tend to want to promote a particular product or brand for one of two main reasons:

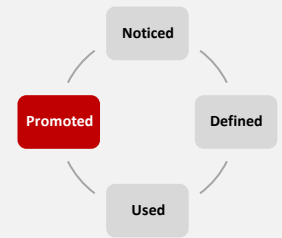
1. They like the person to whom they refer the brand and so they want them to share the joy they received from the product or brand; and/or
2. The brand in some way aligns with their values – how they think things should be – and therefore serves to "amplify" those values. That is, the brand reflects and projects the consumer's self-image and what they stand for. We find many examples of consumers promoting brands that as a way of making a statement about what they value and believe, and what they want others to associate with them (think electric cars, responsibly manufactured clothing, or an exclusive club membership.)

What this means is that the storytelling you developed in Phase 2 where you "define" your brand continues in different forms once you're interacting directly with the customer or the customer is interacting with your products (or farm/plant/retail store).



## Marketing Toolkit for Northeast U.S. Dairy Processors

### Phase 4: Getting Promoted



The customer was likely drawn to you based on the story you are already telling (via words, images, video, packaging, etc.). You should continue to do all those things as naturally and authentically as possible to connect with your current customers.

### Engender Rapport and Support

In addition to continuing to tell your story, there's another key dimension of your interaction with customers we'd like to share with you now as a final recommendation.

From 2015-2017, we conducted research on behalf of the Better Business Bureau (BBB, [bbb.org](http://bbb.org)) seeking to understand better why consumers may want to buy from one company over another.<sup>1</sup> We found that in general consumers look for five things that companies do that makes the consumer want to continually buy from and promote the company's brand. We called these five things the "5 Gestures of Trust," attitudes and behaviors that any company can practice on a regular basis. They are, to be:

- **Honest** – give customer what they need to know, when they need to know it, in plain language
- **Transparent** – be generous with the information you provide about your company and practices
- **Proactive** – feel the need to provide value to the customer before they ask for it
- **Humble** – recognize and acknowledge that your success is due in large part to your customers, employees, family, and your community
- **Equitable** – share power whenever you can to make doing business with you an "even playing field." Make transactions simple and clear, guarantee the quality of your products, and back that up at every step.

Here are some articles, a podcast, and a report from the BBB that provide more information on this research.

[Report](#) from BBB.

Article in BBB's "Trusted" Magazine: [Do your customers trust your business? Five gestures of trust may determine whether they do or not.](#)

Article in BBB "Trusted" Magazine: [Formula for Building Loyal Customers.](#)

Better Series [Podcast – The 5 Gestures of Trust](#)

*Finally, keep the cycle going. Realize that the best way for you to get noticed and start the cycle again is to have customers promote you alongside your own promotion.*

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<sup>1</sup> See [bbb.org/5gestures](http://bbb.org/5gestures) for more information on this study.