

# 1999 Geo-Demographic Analysis of the Vermont Visitor



*Prepared for  
The Vermont Department of Tourism and Marketing*

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*August, 1999*



# A Geo-Demographic Analysis of the Vermont Visitor

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*August, 1999*

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## **EXECUTIVE SUMMARY**

### **A GEO-DEMOGRAPHIC ANALYSIS OF VERMONT VISITOR**

- This project is one of eight scheduled projects in 1998 - 1999 funded through the Vermont Department of Tourism and Marketing and conducted by the University of Vermont. The research was designed and analyzed by William Baker from the University of Vermont School of Business Administration in partnership with the School of Natural Resources and Vermont Tourism Data Center.
- The majority of household visits to Vermont continue to come from New England (28%) and the Middle Atlantic states (31.1%). Compared to individuals living outside of these two regions, New Englanders are more than 10 times as likely to visit Vermont and residents of the Middle Atlantic States are almost 4 times as likely to visit Vermont. This trend accelerates in the winter. More than 3 out of every 4 winter visitors come from these two regions.
- The report provides a geo-demographic profile of the Vermont visitor using traditional survey research methods and PRIZM. PRIZM is a geo-demographic lifestyle segmentation system that breaks the U.S. population into 62 lifestyle clusters (and 12 super clusters). These clusters are defined by over 40 geographic, demographic and psychographic factors.
- The demographic profile of the Vermont visitor continues to be upscale. The visitors have higher incomes and achieve higher levels of education than the typical American. They also tend to be somewhat older than average and tend not to have children under the age of 18 living at home. The two PRIZM segments identified last year, Small Town Gentry and Metro Achievers, comprise 42% of all Vermont visitors.

## METHODOLOGY

- A geo-demographically balanced consumer mail panel managed by the NPD Group, a full service national marketing research firm, fielded this research.
- A single question, “If you took a pleasure trip to or through Vermont anytime from April 1998 through March 1999, “X” in the month(s) in which you visited,” was sent to a geo-demographically balanced sample of 225,000 U.S. households. This question differed from the 1998 question in important ways. First, the word “pleasure” was added to the question to focus respondents on the purpose of the trip. Second, and most importantly, the wording and response options for the question focused the respondents on the exact time frame of the study. The prior question used less precise wording that might have caused people to over-report their visits to Vermont. For this reason, estimates of the total number of households visiting Vermont is expected to be more accurate this year than last year. *Any change between this year and last year cannot be interpreted as a real change; it is likely to be methodologically based.* In future years, the exact wording used this year will be maintained. Thus, any change in future years can be attributed to real changes in visitation.
- 151,885 screener response cards were returned for a response rate of 67.5%.

## RESULTS

### SEASONAL VISITATION PATTERNS (April 1998 through March 1999)

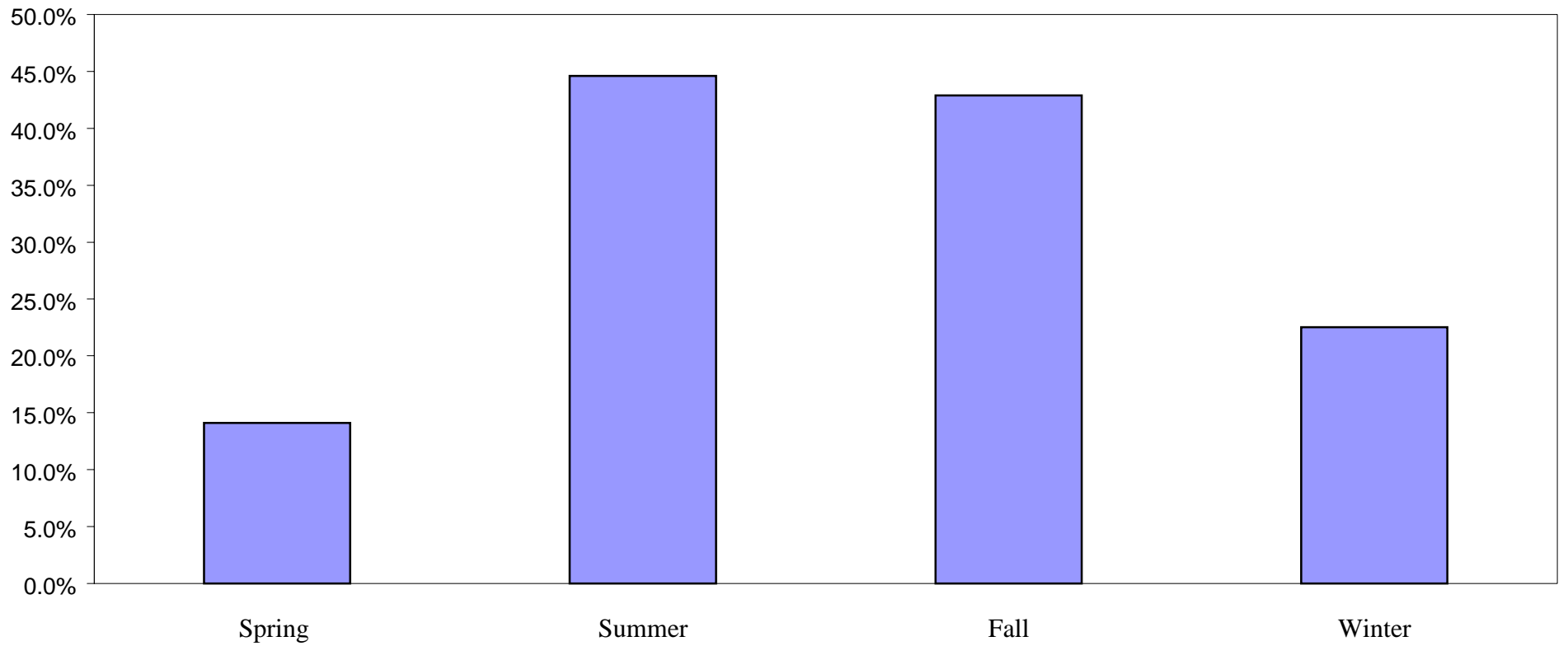
- The number of households visiting in the winter and spring seasons significantly lags the summer and fall. It's important to note that "winter" was calculated as the number of households visiting in December, January, February and March, "spring" was calculated as April and May, "summer" as June, July, and August, and "fall" as September, October and November.

### VISITATION PATTERN BY SEASON

	<b>1999 Percent of Visiting Households</b>
<b>Season*</b>	
Spring	14.1%
Summer	44.6%
Fall	42.9%
Winter	22.5%

\*Percents sum to more than 100% because some households visited in more than one season.

### Percent of Households Visited



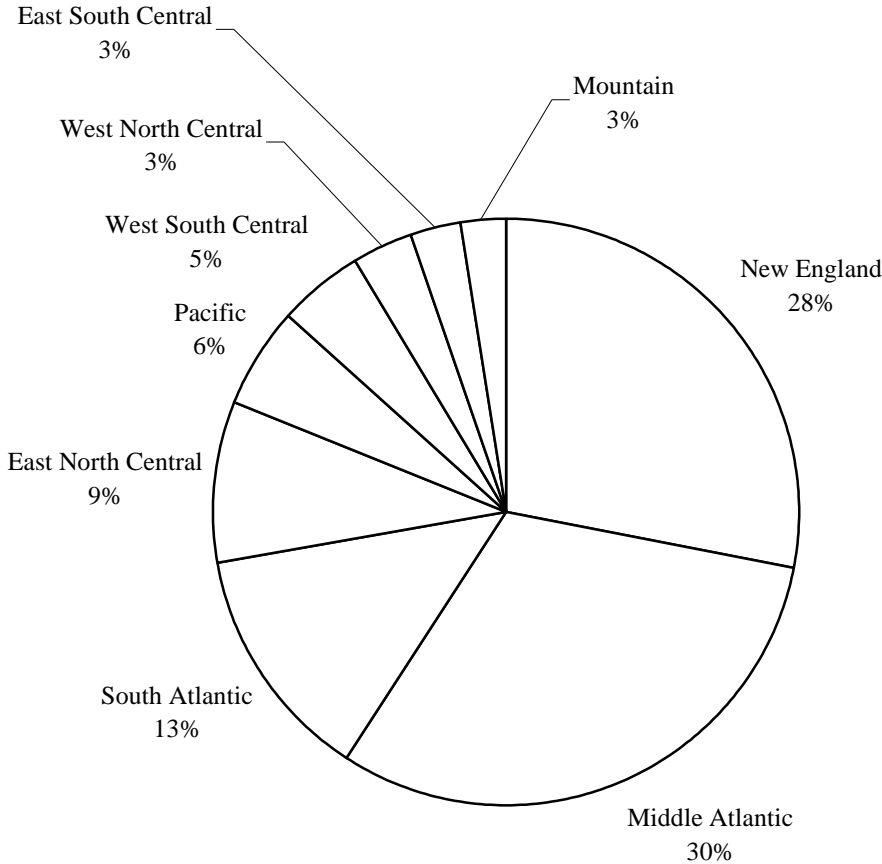
## CENSUS REGION

- Households in New England and the Middle Atlantic States (i.e., NY, NJ, PA) continue to contribute the majority of Vermont visitors. These regions contain about 21% of the U.S. population, but contribute 59% of all Vermont visitors.
- Households in New England are 6.4 times more likely to visit Vermont than the average U.S. household; households in the Middle Atlantic States are 1.9 times more likely than the U.S. average to visit Vermont. All other census regions produce a disproportionately low percent of Vermont visitors.
- In the winter months, 76% of all visiting Vermont households come from these two regions, suggesting that Vermont has trouble attracting outside visitors during these months. This may reflect a lower incidence of skiing in these outside regions, particularly the South Atlantic and East North Central states, or it may reflect the perception among skiers in these regions that there are better places to ski than Vermont.

## CENSUS REGION

Census Region	U.S. Percent	1998 VERMONT Percent	1998 VERMONT Index	1999 VERMONT Percent	1999 VERMONT Index
New England	4.4%	24.8%	564	28.0%	636
Middle Atlantic	16.3%	29.9%	183	31.1%	191
South Atlantic	17.6%	13.5%	77	13.1%	74
East North Central	18.5%	9.8%	53	8.8%	48
Pacific	13.2%	6.7%	51	5.7%	43
West South Central	9.7%	5.4%	56	4.8%	49
West North Central	8.2%	3.5%	42	3.2%	39
East South Central	6.2%	3.3%	53	2.7%	44
Mountain	6.1%	3.1%	51	2.6%	43

# 1999 Vermont Visitor Orgins



- New England (ME, VT, NH, MA, CT, RI)*
- Middle Atlantic (NY, PA, NJ)*
- South Atlantic (DE, DC, FL, GA, MD, NC, SC, VA, WV)*
- East North Central (IL, IN, MI, OH, WI)*
- Pacific (AK, CA, HI, OR, WA)*
- West South Central (AK, LA, OK, TX)*
- West North Central (KS, IA, MN, MO, NB, ND, SD)*
- East South Central (AL, KY, MS, TN)*
- Mountain (AZ, CO, ID, MT, NV, NM, UT, WY)*



## MSA PROFILE OF VISITORS

- Vermont continues to draw visitors from small cities, towns and rural areas at least as well as visitors from large metropolitan areas. About 45% of all visiting Vermont households are from MSAs exceeding 1 million in population, but 47% of all Americans live in these MSAs.
  
- Since 62% of residents in the Northeast live in metropolitan areas, a higher rate than the rest of the nation, one may conclude that residents of larger cities have a somewhat lower than average propensity to visit Vermont.

## MSA PROFILE OF VISITORS

<b>MSA Population Density</b>	<b>U.S. Percent</b>	<b>1998 VERMONT Percent</b>	<b>1998 VERMONT Index</b>	<b>1999 VERMONT Percent</b>	<b>1999 VERMONT Index</b>
More than 2,500,000	24.0%	26.0%	108	24.1%	100
1,000,000 – 2,500,000	23.4%	20.7%	88	20.7%	88
500,000 — 1,000,000	9.6%	12.3%	123	13.1%	136
250,000 - 500,000	10.9%	10.3%	94	10.0%	92
50,000 - 249,000	9.8%	10.3%	105	11.1%	113
Non-MSA	22.3%	20.5%	93	21.0%	94

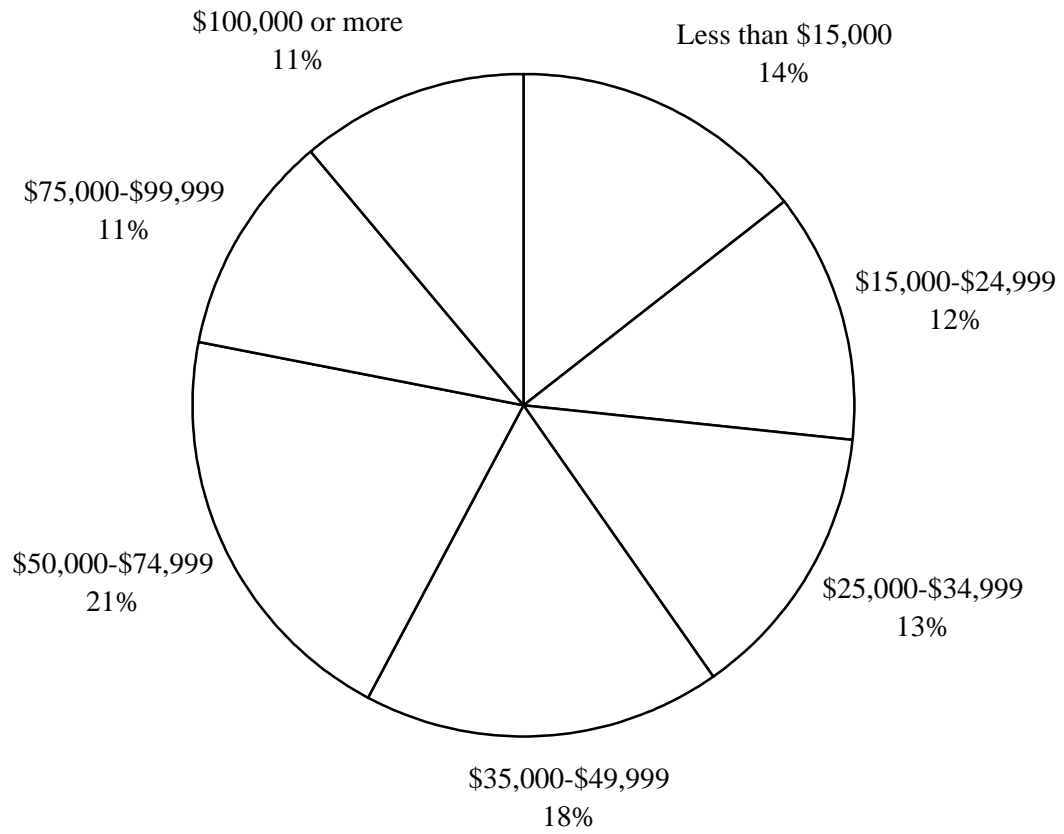
## HOUSEHOLD INCOME

- Upscale households continue to have a higher tendency to visit Vermont than lower income households. Individuals living in households earning \$75,000 or more are twice as likely to visit Vermont than individuals living in households earning less than \$25,000.
  
- The bias towards upper income households is somewhat stronger in winter.

## ANNUAL HOUSEHOLD INCOME

Household Income	U.S. Percent	1998	1998	1999	1999
		VERMONT Percent	VERMONT Index	VERMONT Percent	VERMONT Index
Less than \$15,000	20.9%	17.3%	83	14.4%	69
\$15,000 - \$24,999	16.0%	13.2%	83	12.4%	78
\$25,000 - \$34,999	14.7%	12.9%	88	13.4%	91
\$35,000 - \$49,999	17.0%	16.4%	96	17.6%	104
\$50,000 - \$74,999	17.2%	19.3%	112	20.4%	119
\$75,000 - \$99,999	7.8%	10.2%	131	10.9%	140
\$100,000 or more	6.4%	10.6%	164	11.0%	172

# Annual Household Income of Vermont Visitors 1999



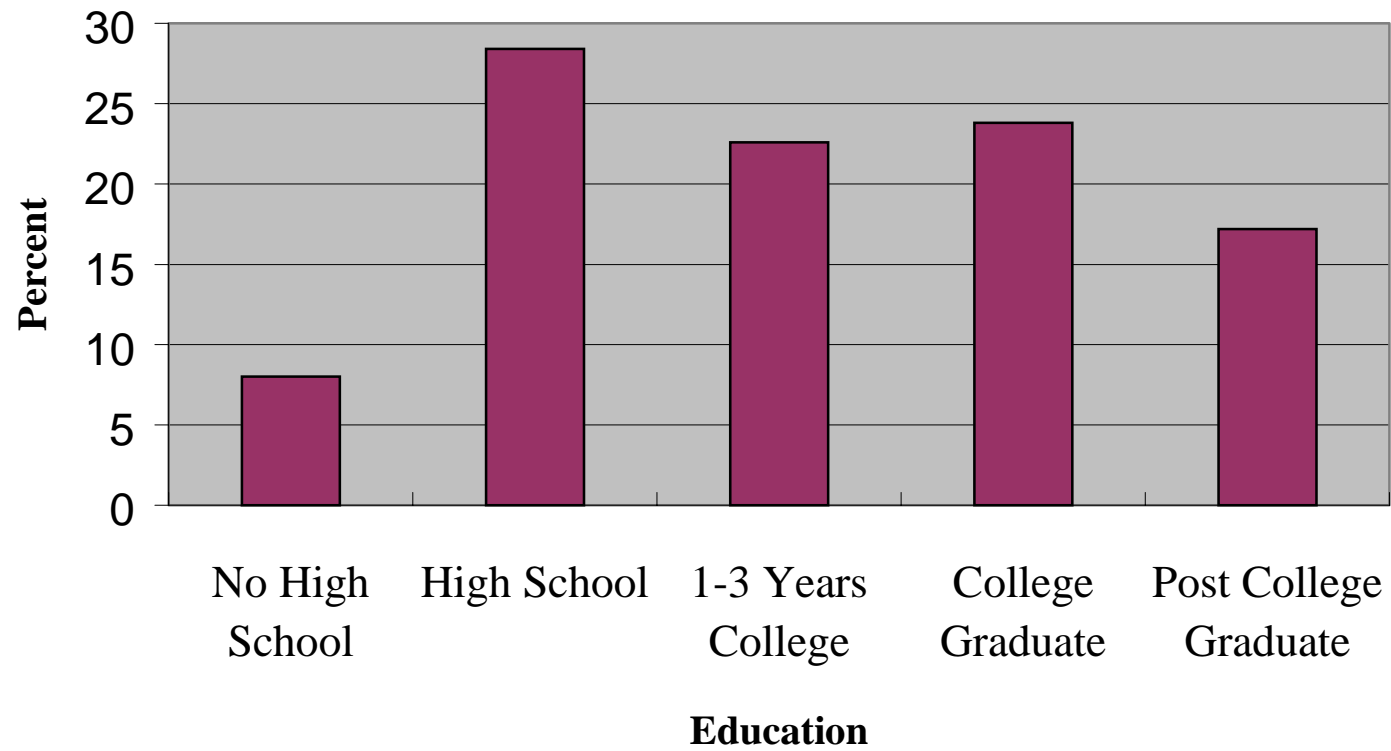
**EDUCATION**

- Individuals with at least four years of college continue to have a higher than average inclination to visit Vermont. They are almost twice as likely to visit Vermont as people with no college training.
- Almost half of all winter visitors, 48%, have at least four years of college.

**EDUCATION**

<b>Education</b>	<b>U.S. Percent</b>	<b>1998 VERMONT Percent</b>	<b>1998 VERMONT Index</b>	<b>1999 VERMONT Percent</b>	<b>1999 VERMONT Index</b>
No High School	12.2%	9.7%	80	8.0%	66
High School	35.0%	30.3%	87	28.4%	81
1-3 Years College	24.0%	21.1%	88	22.6%	94
College Graduate	18.4%	22.9%	124	23.8%	129
Post College Graduate	10.5%	16.0%	152	17.2%	164

## 1999 Education Levels of Vermont Visitors



## AGE OF HEAD OF HOUSEHOLD

- The age profile of the Vermont visitor tends to be older than the general population.
- Almost half of all visiting households in the fall are headed by individuals over the age of 55. In the winter, however, these households represent only 25% of visitors. In the winter, visitors are fairly evenly distributed among 25-55 year-olds.

## AGE OF HEAD OF HOUSEHOLD

Age	U.S. Average	1998	1998	1999	1999
		VERMONT Overall (Percentage)	VERMONT Overall (Index)	VERMONT Overall (Percentage)	VERMONT Overall (Index)
18-24	4.3%	3.5%	81	3.0%	70
25-34	18.9%	17.9%	95	15.0%	79
35-44	24.3%	22.9%	94	21.9%	90
45-54	18.0%	18.1%	101	20.1%	112
55-64	12.6%	13.9%	110	16.4%	130
65 and older	21.8%	23.8%	109	23.6%	108

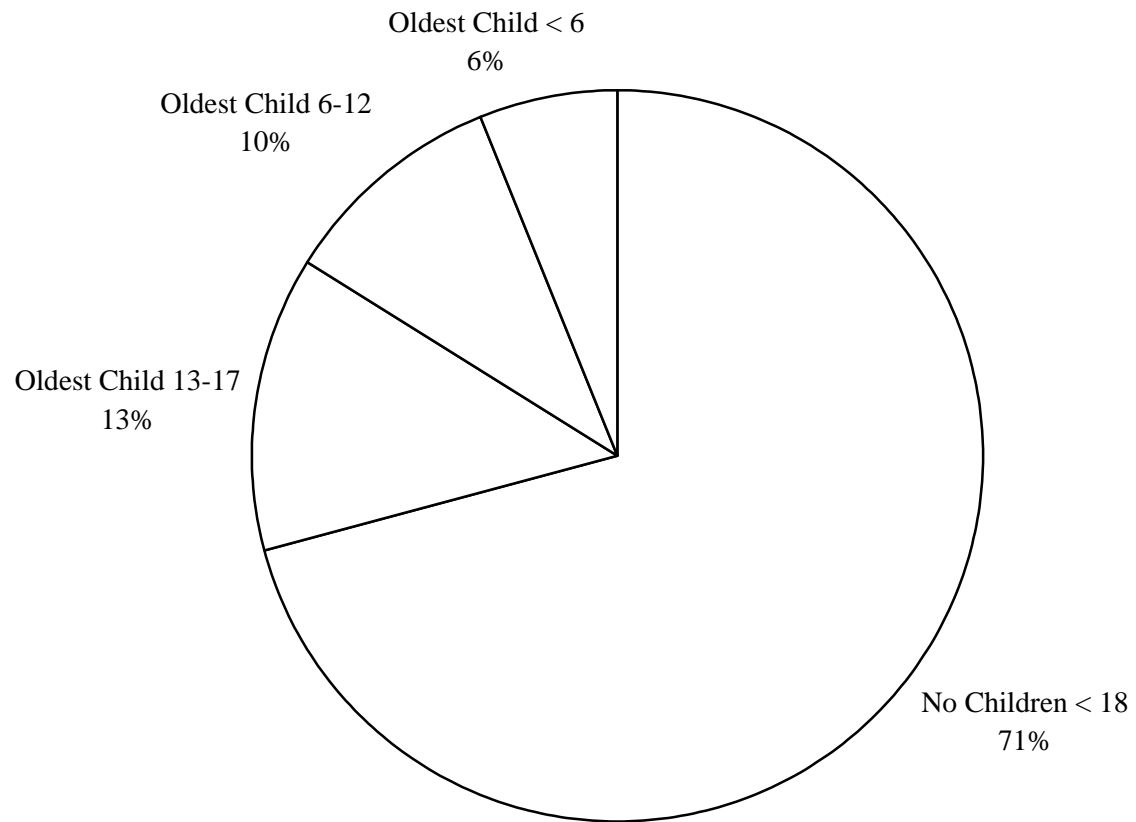
## PRESENCE OF CHILDREN IN HOUSEHOLD

- Vermont continues to attract households without children. About 71% of all households visiting Vermont do not have children under the age of 18 living at home. On average, 65% of all U.S. households do not have children living at home.
- In the winter and summer months, the percentage of households visiting without children drops to about 65%. In the fall, the percentage jumps to 78%.

## PRESENCE OF CHILDREN IN HOUSEHOLD

Presence of Children	U.S. Percent	1998 VERMONT Percent	1998 VERMONT Index	1999 VERMONT Percent	1999 VERMONT Index
No children < 18	64.8%	71.7%	111	70.9%	109
Oldest child 13-17	14.3%	12.7%	89	12.9%	90
Oldest child 6-12	12.1%	9.7%	80	10.0%	83
Oldest child < 6	8.7%	5.8%	67	6.2%	71

# Presence of Children in Household Among Vistors to Vermont in 1999





## HOUSEHOLD SIZE

- The household size profile of Vermont visitors closely resembles the overall national profile. The most common visiting household size is two, which contributes 35.5% of all visitors.

## HOUSEHOLD SIZE

Household Size	U.S. Percent	1998	1998	1999	1999
		VERMONT Percent	VERMONT Index	VERMONT Percent	VERMONT Index
One Person	25.8%	26.6%	103	25.4%	98
Two People	33.1%	35.9%	108	35.5%	107
Three-Four People	31.1%	28.8%	93	30.1%	97
More than Four	10.0%	8.7%	87	9.0%	90

## HOUSEHOLD TYPE

- The household type profile of the Vermont visitors also mirrors that of the U.S. population in general. The most common visiting household type is married with dual income.
- Households headed by single females make up as many visiting households as traditional married households with a single income.

## HOUSEHOLD TYPE

Household Type	U.S. Percent	1998 VERMONT Percent	1998 VERMONT Index	1999 VERMONT Percent	1999 VERMONT Index
Married with Dual Income	33.1%	33.8%	102	35.8%	108
Married with One Income	22.7%	20.6%	91	20.7%	91
Single Female	29.7%	28.4%	96	27.5%	93
Single Male	14.4%	17.2%	119	16.0%	111

\* Single refers to single, separated, divorced or widowed

## HOUSEHOLD COMPOSITION

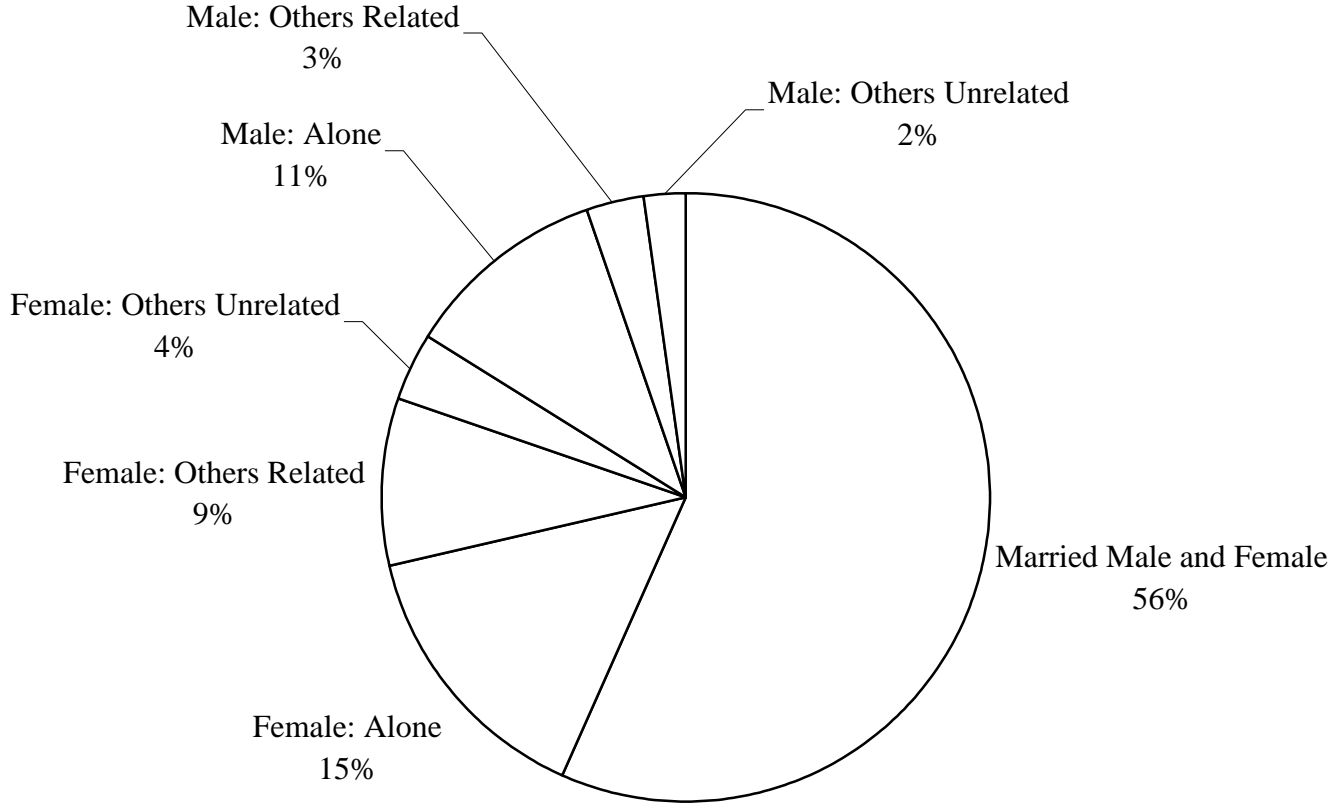
- Other than households with married couples, which dominate the both the Vermont visitor profile and the U.S. household profile, the most common composition of a household visiting Vermont is a single female living alone. Single females living alone and single males living alone comprise a quarter of all households visiting Vermont.

## HOUSEHOLD COMPOSITION

Household Composition	U.S. Percent	1998 VERMONT Percent	1998 VERMONT Index	1999 VERMONT Percent	1999 VERMONT Index
Married Male and Female	55.9%	54.4%	97	56.6%	101
Female: Alone	15.3%	14.8%	97	14.8%	97
Female: Others Related	11.5%	9.6%	83	9.0%	78
Female: Others Unrelated	2.9%	3.9%	134	3.7%	128
Male: Alone	10.5%	11.7%	111	10.6%	95
Male: Others Related	2.4%	2.8%	117	3.1%	129
Male: Others Unrelated	1.5%	2.8%	187	2.3%	152

\*Single refers to single, separated, divorced or widowed

### Household Composition of Visitors to Vermont in 1999



## RACE

- 93.3% of Vermont visitors are white. This mirrors the U.S. population profile. An African-American is half as likely to visit Vermont as a white or Asian-American.

## RACE

<b>Race</b>	<b>U.S. Percent</b>	<b>1998 VERMONT Percent</b>	<b>1998 VERMONT Index</b>	<b>1999 VERMONT Percent</b>	<b>1999 VERMONT Index</b>
White (non-Hispanic)	89.9%	90.7%	101	93.3%	104
African American	5.6%	4.7%	84	3.0%	54
Asian American	1.1%	1.6%	145	1.1%	100
Other	3.5%	3.0%	86	2.6%	74

## MARKET ANALYSIS

### PRIZM SUPER CLUSTERS

- PRIZM aggregates several dozen geographic, demographic and psychographic variables to create 12 super lifestyle clusters and 62 specific clusters. The 12 super clusters below are defined primarily by geography (i.e., urban, suburban, town and rural) and socio-economic status (1 high – 4 low).
- The super cluster profile below demonstrates that **socio-economic status** continues to be the single greatest influence on propensity to visit Vermont. Individuals from households ranked in PRIZM's top socio-economic group comprise about one third of U.S. households, but contribute almost 50% of all households visiting Vermont.
- Well-educated, affluent individuals living in large cities and the suburbs of large cities, **but** also from small towns and rural areas far from major metropolitan areas all continue to have a higher than average inclination to visit Vermont.

## PRIZM SUPER CLUSTERS

Super Cluster	U.S. Percent	1999 VERMONT (Percent)	1998 VERMONT Index	1999 VERMONT (Index)
Town 1	6.8%	11.8%	169	172
Suburban 1	9.3%	13.4%	157	144
Large Urban 1	5.5%	6.6%	141	119
Rural 1	6.1%	8.5%	132	139
Small Urban 1	5.7%	7.8%	112	136
Large Urban 2	6.3%	5.2%	100	82
Suburban 2	7.9%	8.1%	99	102
Town 2	6.1%	6.3%	97	103
Small Urban 2	7.4%	6.6%	90	88
Town 3	6.9%	5.0%	76	72
Large Urban 3	5.3%	3.4%	76	63
Suburban 3	6.2%	4.0%	74	64
Rural 3	9.6%	6.8%	71	71
Small Urban 3	7.2%	4.4%	61	61
Rural 2	3.7%	2.1%	51	53

## **PRIZM SPECIFIC TARGET MARKETS**

- In last year's study, an analysis of the 62 specific PRIZM clusters suggested the presence of two dominant target markets for Vermont marketing efforts. These two segments were about equal in size. Together, they made up 36.8% of all visiting households. They continue to have a much higher than average propensity to visit Vermont. In this year's study, they accounted for 42.2% of all visiting households.
  
- The first target market, **Metro Achievers**, is made up of the most affluent, most urbane PRIZM segments. These people are the "movers and shakers" in our largest metropolitan areas. They have high incomes, high stress lifestyles and are likely to view Vermont as a welcome relief from their urban grind. They comprised 22.7% of all visiting households.
  
- The second target market, **Small Town Gentry**, is made up of well-educated affluent families living in small town and rural areas outside of major metropolitan areas. They are similar to Metro Achievers in educational background, but they have traded the high powered, high-income metropolitan lifestyle for less stress and more serenity. One may speculate that Vermont is a symbol of the lifestyle choices that they have made, it conforms to their view of life. They comprised 19.5% of all visiting households.



**PRIZM  
SPECIFIC TARGET MARKETS**

Target Markets	Super Cluster/ Specific Cluster	1999 VERMONT (Percent of Visitors)	1998 VERMONT (Index)	1999 VERMONT (Index)
<b>Small Town Gentry</b>		<b>19.5%</b>	<b>179</b>	
God's Country	T1 / 15	4.4%	180	170
Big Fish, Small Pond	T1 / 16	1.9%	149	135
New Homesteaders	T2 / 37	2.4%	150	139
New Eco-topia	R1 / 42	2.3%	311	261
Big Sky Families	R1 / 41	2.7%	186	181
Country Squires	T1 / 14	3.6%	235	281
Greenbelt Families	T1 / 17	2.2%	133	147
<b>Metro Achievers</b>		<b>22.7%</b>	<b>146</b>	
Winner's Circle	S1 / 2	3.9%	213	188
New Empty Nests	S2 / 19	2.9%	143	138
Pools & Patios	S1 / 4	2.8%	183	157
Kids & Cul-de-Sacs	S1 / 5	3.4%	118	119
Executive Suites	S1 / 3	1.7%	124	127
Young Literati	U1 / 8	1.4%	137	157
Bohemian Mix	U1 / 10	1.8%	141	120
Money and Brains	U1 / 7	1.4%	139	129
Urban Gold Coast	U1 / 6	1.4%	287	233
Blue Blood Estates	S1 / 1	2.0%	233	170

**The Complete 62 Cluster  
PRIZM PROFILE  
(ranked by propensity to visit Vermont)**

- Below is the full 62 cluster PRIZM profile of the Vermont visitor. This profile, along with the two target segment profiles above, can provide a wealth of lifestyle and media consumption information that can be used to plan, develop and target marketing communication programs.
  
- We strongly recommend that this information be used to prioritize media markets and choose specific media (e.g., radio formats, TV shows, magazines, etc.), as well as guide any direct marketing efforts.
  
- We also recommend that full lifestyle portraits of the two target markets defined above be procured to facilitate creative development, promotion development and the selection of corporate sponsorships.

**The Complete 62 Cluster  
PRIZM PROFILE  
(ranked by propensity to visit Vermont)**

<b>Cluster Name</b>	<b>U.S. Percent</b>	<b>1999 Vermont Percent</b>	<b>1998 Cluster Index</b>	<b>1999 Cluster Index</b>
42 New Eco-topia	.9%	2.4%	311	261
6 Urban Gold Coast	.6%	1.4%	287	233
14 Country Squires	1.3%	3.7%	235	281
1 Blue Blood Estates	1.2%	2.0%	233	170
2 Winner's Circle	2.1%	3.9%	213	188
41 Big Sky Families	1.5%	2.7%	186	181
4 Pools & Patios	1.8%	2.8%	183	157
15 God's Country	2.6%	4.4%	180	170
37 New Homesteaders	1.7%	2.4%	150	139
16 Big Fish, Small Pond	1.4%	2.9%	149	135
11 Second City Elite	1.9%	3.4%	148	179
19 New Empty Nests	2.1%	2.9%	143	137
10 Bohemian Mix	1.5%	1.8%	141	119
7 Money & Brains	1.1%	1.4%	139	129
8 Young Literati	.9%	1.4%	137	157
17 Greenbelt Families	1.5%	2.2%	133	147
3 Executive Suites	1.3%	1.6%	124	127
5 Kids & Cul-de-Sacs	2.9%	3.4%	118	118
13 Gray Power	2.0%	2.6%	116	131
29 Old Yankee Rows	1.3%	1.6%	113	121
31 Latino America	1.2%	.9%	113	76
43 River City, USA	1.8%	2.3%	112	127
27 Urban Achievers	1.6%	1.4%	111	89
9 American Dreams	1.4%	1.0%	109	68
18 Young Influentials	1.3%	1.5%	109	112
32 Middleburg Managers	1.7%	1.7%	103	101
58 Blue Highways	2.0%	2.0%	103	99
52 Golden Ponds	1.6%	1.4%	100	89
36 Towns & Gowns	1.4%	1.3%	100	96

33 Boomtown Singles	1.0%	.9%	98	94
22 Blue-Chip Blues	1.9%	1.8%	96	94
12 Upward bound	1.8%	1.9%	96	107
26 Gray collars	2.0%	1.4%	95	68
30 Mid-City Mix	1.1%	.6%	93	51
46 Hispanic Mix	1.6%	1.4%	93	88
21 Suburban Sprawl	1.5%	1.5%	89	97
39 Red, White & Blues	1.8%	1.6%	84	90
35 Sunset City Blues	1.7%	1.4%	82	80
34 Starter Families	1.6%	1.3%	81	79
38 Middle America	2.2%	1.9%	77	86
45 Single City Blues	1.7%	1.1%	73	62
55 Mines & Mills	2.2%	1.5%	72	68
47 Inner Cities	1.9%	1.0%	72	52
23 Upstarts & Seniors	1.3%	.9%	72	71
59 Rustic Elders	1.9%	1.5%	70	78
44 Shotguns & Pickups	1.9%	1.1%	70	60
51 Southside City	2.0%	1.0%	68	50
56 Agri-Business	1.4%	1.0%	65	73
49 Hometown Retired	1.2%	1.1%	63	94
20 Boomers & Babies	1.1%	.7%	62	68
53 Rural Industria	1.7%	1.1%	62	66
28 Big City Blend	1.1%	.7%	60	67
60 Back Country Folks	2.2%	.6%	60	72
40 Military Quarters	.4%	.3%	58	74
48 Smalltown Downtown	1.8%	1.1%	57	61
50 Family Scramble	2.2%	1.0%	56	45
62 Hard Scrabble	2.0%	.6%	56	29
25 Mobility Blues	1.5%	.7%	56	46
24 New Beginnings	1.2%	.9%	55	79
54 Norma Rae-ville	1.4%	.8%	52	54
61 Scrub Pine Flats	1.5%	1.0%	51	66
57 Grain Belt	2.3%	.9%	42	38
<b>Total</b>	<b>100</b>	<b>100.00</b>		