2001 NATIONAL SURVEY OF THE VERMONT VISITOR

Executive Summary

Prepared for
The Vermont Department of Tourism and Marketing

Prepared by
School of Business Administration and Vermont Tourism Data Center-
School of Natural Resources, University of Vermont

Research Available through a partnership between the Vermont Department of Tourism and Marketing (VDTM) and Vermont Tourism Data Center (VTDC), School of Natural Resources, University of Vermont

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Introduction

An estimated 13.8 million person trips were made to Vermont by U.S. households in the 2001 travel year (December 2000- November 2001). These visitors came to Vermont an average of two times a year, traveled here by car, and 51% said that they purchased Vermont products. This and much more information is contained in two reports “The 2001 Geo-Demographic Analysis of the Vermont Visitor,” and the “2001 National Survey of the Vermont Visitor,” that the Vermont Department of Tourism and Marketing commissioned the Vermont Tourism Data Center and the School of Business Administration at the University of Vermont to complete. These two studies analyze the basic characteristics of visitors to Vermont and use a nationally recognized life-style profiling system called Prizm Profiling. The Vermont Department of Tourism and Marketing uses this research to build more effective marketing initiatives.

This Executive Summary is meant to assist our marketing partners and the Vermont Travel Industry – Regional Marketing Organizations, chambers of commerce, private organizations and businesses, as well as public agencies – in focusing their marketing strategies.

Who visits Vermont?

Summary of the Geo-Demographic Analysis of the Vermont Visitor

This report summarizes geographic and demographic information about people who indicated they had made at least one pleasure trip to Vermont between December 1, 2000 and November 30, 2001 from a nationally balanced consumer panel study of 225,000 US households that is maintained by Ipsos-NPD, a national research firm. (Page numbers in parenthesis refer to pages in the full report, “A Geo-Demographic Analysis of the Vermont Visitor” which can be found on line at http://snr.uvm.edu/vtdc/.)

In 2001:

- 32% of visitation occurred in the summer, 33% in the fall, 20% in the winter, and 15% in the spring in 2001 (p. 6).

- The months of July, August, September, and October were the peak times during which households made at least one trip to Vermont (p.8).

- Compared to the 1999-2000 data, in 2001 every month except September showed an increase in the number of households visiting Vermont at least once. Notably, despite the September 11 terrorist attacks, visits to Vermont in October and November of 2001 increased significantly compared to the same months in 1999 (p.8).

- 24% of Vermont visitors came from New England: Connecticut, 6.37%; Maine, 1.92%; Massachusetts,10.41%; New Hampshire, 4.37%; Rhode Island, 1.14%. New Englanders were nearly five times more likely than the average U.S. household to make at least one trip to Vermont.
• The Middle Atlantic states accounted for 30% of Vermont’s visitors: Pennsylvania, 5.79%; New Jersey, 5.1%; and New York, 19.21%. Households in this region were over two times more likely to visit Vermont than the average U.S. household.

• The major distant domestic markets consisted of Florida, 4.65% of Vermont visitors; California, 4.14%; Texas, 3.16%; Ohio, 2.6%; Illinois, 2.12%; and Michigan 2.12%. (pgs. 10 -12, also include visitation by each state).

• Relatively upscale households with annual household incomes of between $50,000 and $99,999 demonstrated the highest propensity to make at least one trip to Vermont. This group was approximately 25% more likely to do so than the average U.S. household (p.14).

• 68.3% of visitor households had no children under the age of 18 (p.18).

• Households headed by individuals who have received a college or post-college degree were over 50% more likely than the average U.S. household to make one or more trips to Vermont (p. 16).

• Households headed by individuals between 55 and 64 years old had the highest propensity to make one or more trips to Vermont, with a 23% greater likelihood of traveling to the state than the average U.S. household (p.17).

**Significant Characteristics of the Vermont Visitor**

**Summary of the 2001 National Survey of the Vermont Visitor**
This report, a follow-up survey of visitors who said that they came to Vermont in 2001, is based on 1,473 valid questionnaires, a 40.1% response rate. It summarizes the information obtained from a geographically and demographically balanced sample of visitors to Vermont. The information collected includes: the primary destination of visitors to Vermont, the number of members in the visitors’ traveling party, activities undertaken by visitors while in Vermont, visitors’ estimates of their travel expenditures while in Vermont, visitors’ perceptions of the influence of various information sources on their decision to travel to Vermont, and other facts related to visitors’ travel patterns. *(Page numbers in parenthesis refer to pages in the full report, “2001 National Survey of the Vermont Visitor,” which can be found on line at http://snr.uvm.edu/vtdc/.)*

**In 2001:**

• Approximately two-thirds of visiting household (64.6%) visited Vermont one time. However, a relatively small percent (13.2%) of visiting households made 3 to 5 trips over the four seasons, and almost six percent (5.9%) made six or more trips to Vermont (p.7).

• Within the seasons, the largest percent of visiting households made only one trip. For example, 37.0% of visiting households made one (and only 1) trip in the fall. Again, however, a small minority (0.5%) made as many as 6 or more trips in the fall (p.7).
• Comparing the number of trips over the seasons, the average number of winter trips (1.9) was higher than the spring (1.3), summer (1.4), and fall (1.3) (p.7).

• The most popular seasons for taking one or more trips to Vermont were summer and fall. A total of 46.8% and 44.7% of visiting households made one or more trips in the summer and fall, respectively, while only 31.0% and 21.4% of visitors made the same number of trips in the winter and spring, respectively (p.7).

• Approximately two-thirds (67.6%) of visiting households reported that they were leaning toward visiting Vermont sometime again in the next 12 months (p.9).

**Where Do Visitors to Vermont Go?**

• For every season except spring, Burlington was the community named as the primary travel destination for pleasure trips in Vermont (p.13).

• The primary destinations of almost two-thirds of Vermont pleasure trips were four regions:

  Southern Vermont (Brattleboro, Stratton and Mount Snow), 19.8%;
  SoVermont (Bennington, Manchester, Bromley), 16.9%;
  Lake Champlain Valley (Greater Burlington), 15.3%;
  Crossroads of Vermont (Rutland and Killington Area), 12.9% (p.10).

• In the fall and spring, SoVermont (Bennington, Manchester, Bromley) was the leading pleasure trip destination, with 20.0% and 22.1% of each season’s trips, respectively.

• In summer, Lake Champlain Valley (Greater Burlington) accounted for the largest percent of trips (16.9%). In the winter, Southern Vermont (Brattleboro, Stratton and Mount Snow) was the dominant destination, accounting for 27.6% of pleasure trips (p.10).

• Please keep in mind when viewing regional breakdowns that this study only includes U.S. domestic visitors, and not international or Canadian visitors.

  *(See table and map on the following page)*
### Regions Visited

<table>
<thead>
<tr>
<th>Regions</th>
<th>All Seasons</th>
<th>Winter</th>
<th>Spring</th>
<th>Summer</th>
<th>Fall</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Vermont's Islands and Farms</td>
<td>1.6%</td>
<td>0.8%</td>
<td>1.2%</td>
<td>2.9%</td>
<td>1.2%</td>
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<tr>
<td>2. Stowe/Smugglers' Notch Region</td>
<td>7.1%</td>
<td>7.9%</td>
<td>4.3%</td>
<td>7.1%</td>
<td>7.3%</td>
</tr>
<tr>
<td>3. Northeast Kingdom</td>
<td>4.7%</td>
<td>2.8%</td>
<td>6.3%</td>
<td>5.7%</td>
<td>4.9%</td>
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<td>4. Lake Champlain Valley</td>
<td>15.3%</td>
<td>13.9%</td>
<td>15.8%</td>
<td>16.9%</td>
<td>14.8%</td>
</tr>
<tr>
<td>5. Central Vermont</td>
<td>5.5%</td>
<td>5.1%</td>
<td>4.0%</td>
<td>5.2%</td>
<td>6.8%</td>
</tr>
<tr>
<td>6. Mid Vermont For All Seasons</td>
<td>2.2%</td>
<td>0.9%</td>
<td>2.8%</td>
<td>3.4%</td>
<td>1.9%</td>
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<tr>
<td>7. Crossroads of Vermont</td>
<td>12.9%</td>
<td>14.9%</td>
<td>11.5%</td>
<td>12.2%</td>
<td>12.2%</td>
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<tr>
<td>8-9. Eastern Vermont Gateway</td>
<td>9.1%</td>
<td>6.5%</td>
<td>9.1%</td>
<td>12.2%</td>
<td>8.3%</td>
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<td>10. Southern Windsor</td>
<td>5.0%</td>
<td>6.5%</td>
<td>3.2%</td>
<td>4.5%</td>
<td>4.7%</td>
</tr>
<tr>
<td>11. SoVermont</td>
<td>16.9%</td>
<td>13.0%</td>
<td>22.1%</td>
<td>15.6%</td>
<td>20.0%</td>
</tr>
<tr>
<td>12. Southern Vermont</td>
<td>19.8%</td>
<td>27.6%</td>
<td>19.8%</td>
<td>14.4%</td>
<td>17.9%</td>
</tr>
</tbody>
</table>

*This report was prepared for the Vermont Department of Tourism and Marketing as a part of an ongoing partnership with the University of Vermont-Vermont Tourism Data Center*
What do people like to do when they are in Vermont?

By season, the primary purpose(s) for household trips to Vermont were (pgs.16-25):

**Winter:** downhill skiing
**Spring:** visited relatives and friends; shopping
**Summer:** visited relatives and friends; family get-away
**Fall:** fall foliage touring; visited relatives

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• Among the most popular activities while in Vermont, visiting households reported that they relaxed in the state’s beauty and serenity (41.0%), shopped (39.9%), visited historic sites (27.9%), and visited relatives (24.6%) and friends (23.9%). (p.14).

• While in Vermont, over half of visiting households (50.9%) bought Vermont-made products (e.g., maple syrup, antiques, etc.) (p.14).

• If trips to Vermont included downhill skiing, household members spent an average of just over 4 ½ days skiing over the 2000-2001 winter season (p.30).

• One-third of visiting households reported that they had taken fall foliage trips more than once, but did not do so every year. Over one-third of the households (37.3%) reported that they had never traveled to Vermont to view its fall foliage (p.39).

![Trips to View Fall Foliage](image)

**How Do visitors travel to and within Vermont?**

• The mean (average) number of persons in trips taking into account both household members and members of other households together as a travel party ranged from 2.5 in spring to 3.4 in winter. In winter, households are much more likely to travel with members of other households included in their travel party (pgs. 26 – 28)

![Travel Party Size](image)
• Motor coach group tours were not frequent in the winter, but were a significant factor in the fall, when 3.7% of visiting households visited Vermont at least once by motor coach group tour (p.29).

• Over two-thirds of visiting households traveled without children (under the age of 18 years) on their trip(s) (p.31).

• Reflecting the fact that Vermont is a drive market for many visitors, 77.7% of visiting households traveled to Vermont (at least once) in an automobile or truck they owned. Over six percent (6.1%) of visiting households traveled to the state in a rented automobile or truck and 2.4% by RV or motor home (p.32).

• Almost ten percent (9.0%) of visiting households traveled to Vermont at least once by commercial airline, .3% by private plane, 5.2% by group tour bus, 1.2% by commercial bus, 1.5% by ferry, and 0.7% by train (p.32).

How do visitors find out about Vermont?

• Friends, co-workers or relatives were the most frequently cited source of information on Vermont information source. Suggesting that in-state education is important to the successful marketing. Also seen deemed important marketing tools were the Internet, the Vermont vacation kit, and AAA or other auto club source (p.40).

Where do visitors to Vermont stay?

• Three-quarters (75.0%) of visiting households reported that they made at least one overnight trip to Vermont. The average (mean) number of nights spent in Vermont (during 2001) was 3.8. Four in ten households (40.5%) spent at least once night in a hotel or motel, and 31.0% spent one or more nights in the private residence of a friend or relative (p.34).
How much do visitors to Vermont spend?

- The average total household expenditures per season, taking into account the average number of visiting household trips in a season, was (p. 37):

  Winter: $1,208  
  Spring: $ 415  
  Summer: $ 603  
  Fall:  $ 495  

- Household expenditures on Vermont-made products ranged from 38.8% to 26.3% of shopping and grocery purchases. Across seasons the average household expenditure by season ranged from $53-$105 (p.38).

Marketing Tools

Summary of the PRIZM Life-Style Analysis

For the past three years the Vermont Department of Tourism and Marketing has used PRIZM Life-Style Analysis to target direct mail campaigns.

PRIZM is a geodemographic lifestyle segmentation system designed by Claritas Inc. that breaks the US population into 62 lifestyle clusters (and 12 super clusters). These clusters are defined by over 40 geographic, demographic and psychological factors. These factors in turn help to identify the types of neighborhoods in which visitors to Vermont live. This analysis also provides information about what they like to do, what product types they purchase, types of interests and media used. This type of information can be used by Vermont businesses to determine how best to communicate with potential customers, where their best prospects reside, and what media will provide effective exposure to Vermont’s products and services.

As reported in the "2001 Geo-Demographic Analysis of the Vermont Visitor," four distinctly different household "types" (identified through Prizm analysis), are considerably more likely to have made a vacation trip to Vermont than the average U.S. household. These visitors represent a large portion (47.2%) of the estimated 13.8 million person-trips to Vermont by U.S. domestic visitors in 2001. These "target" household groups include the following clusters:

1. **“Metro Achievers”**: represented 19.1% of households making one trip or more to Vermont. These households are among the most educated and affluent in the U.S. These families live primarily in the suburbs of major metropolitan cities or “second” cities. In 2001, these households exhibited a 43% greater likelihood of making one or more trips to Vermont than the average U.S. household.

2. **“Small Town Movers”**: represented 12.4% of households making one trip or more to Vermont. These are households that live in neighborhoods well outside the metropolitan beltways. They reside in less densely populated areas, are well educated, and have relatively high incomes. In 2001, these households were 67%
more likely to make one or more trips to Vermont than the average U.S. household.

3. “Small Town Rustic”: represented 13.9% of households making one trip or more to Vermont. These households tend to be located in less populated towns, and generally have lower incomes and/or education compared to Small Town Movers. In 2001, these households exhibited a 35% greater likelihood of traveling to Vermont (at least once) than the average U.S. household.

4. “New Eco-topia”: represented 1.7% of households making one trip or more to Vermont. These households tend to live in sparsely populated areas, have moderate incomes, and are characterized by a mixed educational profile. People in this cluster could be typically found in the rural areas of the Northern Pacific, the Rockies, and northern New England. This group is quite technologically savvy. In 2001, households in this cluster exhibited a 91% greater likelihood of traveling to Vermont (at least once) than the average U.S. household – the highest propensity of any cluster to travel to Vermont.

Prizm Analysis Follow-up

The “2001 Geo-Demographic Analysis” reported a number of key differences in the four target markets for Vermont visitor types. Based upon the follow-up 2001 Visitor Study, some additional characteristics of the target markets were identified. (p.44).

- Visiting New Eco-topia households averaged about two times as many trips (4.0) over the four seasons as the three other target segments. Metro Achievers, for example, averaged only 2.1 trips over 2001.

- Metro Achievers (81.1%) and Small Town Movers (78.2%) were most likely to make one or more overnight trips, compared to 69.6% of Small Town Rustic households and only 60.7% of New Eco-topia households.

- Importantly, given that they represent 31.5% of households that made one or more trips to Vermont in 2001, Metro Achievers and Small Town Movers spent more overall per trip per household (on lodging, recreation, shopping, etc.) than did Small Town Rustic and New Eco-topia households in every season. Metro Achievers and Small Town Movers spent $740 and $694 per household per trip in winter, whereas Small Town Rustic and New Eco-topia households spent $480 and $583, respectively.

- Additionally, Metro Achievers and Small Town Movers also exhibited the highest household expenditures per season as well (i.e., taking into account the number of trips made per season by a target segment). However, New Eco-topia household expenditures in the summer ($746) exceeded that of the other three segments, and the segment’s spring expenditure level was between that of Metro Achievers and Small Town Rustics. The economic importance of the New Eco-topia segment stems not so much from dollar amounts spent per trip, but rather from the propensity of at least some of these households to make multiple trips to Vermont.
Interestingly, New Eco-topia households exhibited the highest level of expenditure (per trip and per season) on Vermont-made products (e.g., maple syrup, antiques, etc.) for three of the four seasons (fall being the exception).

Summary

The goal of the State’s ongoing partnership with the University of Vermont’s Tourism Data Center is to provide Vermont-specific information about our visitors. This research is used to guide more effective and efficient marketing strategies by identifying target markets and how to reach them, with the aim of increasing the number of visits to Vermont and the economic impact of the travel industry. The studies also provide the basis for a model of the travel industry’s impact on the larger Vermont economy.