

Summary

**Vermont Tourism and Recreation Survey**

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**Table of Contents**

Introduction ..... 2

Survey Methods ..... 2

    Limitations ..... 4

Results ..... 4

    Demographics of Visitors and Vermonters Traveling for Pleasure ..... 4

    Vacation Planning ..... 6

*Influence on Decision to Visit Vermont* ..... 6

*Information Used for Trip Planning* ..... 8

    Vacation Activities ..... 10

    Overnight Travel ..... 12

    Travel Patterns ..... 13

Conclusions ..... 15

Next Steps ..... 16

# Vermont Tourism and Recreation Survey

## Introduction

To support growth of the tourism and recreation economy in Vermont, a richer understanding of people who vacation and recreate in Vermont is needed. Understanding who they are (both Vermonters and visitors), why they vacation in Vermont, whether they will come back, and what are the emerging markets will provide information to promote growth of the state's tourism and recreation economy. A coordinated effort to address these issues began in the spring of 2012 by surveying people who vacation and recreate in Vermont. The intent of this program of research was to systematically conduct surveys over a two-year period to capture information about visitors at different types of sites (state parks, welcome centers, attractions) and during different seasons.

Researchers at the University of Vermont developed questionnaires in collaboration with the Vermont Department of Tourism and Marketing; the Vermont Department of Forests, Parks, and Recreation; the Vermont Agency of Agriculture; and the Vermont Attractions Association. Survey administration began in the summer of 2012 in selected state parks and selected attractions that were members of the Vermont Attractions Association. In October 2012, eight of Vermont's welcome centers were included in the survey procedure. In July 2013, a computer-based version of the questionnaire was made available via the wi-fi system present in all of Vermont's welcome centers, thus allowing participation by visitors in all of the centers. The Bennington welcome center opened in December 2013 and was added as a site that handed out the paper version of the questionnaire.

## Survey Methods

Survey questionnaires were designed to collect information on who visits tourist destinations and recreation areas in Vermont, what they do while they are here, and how likely they are to return. A sampling protocol was developed to select visitors at these sites to participate in the survey with the objective of creating a representative sample. By collecting information from a representative sample of visitors to the state's tourism and recreation sites (as compared to letting respondents self-select), the data will better represent recreation and tourism in Vermont. After the questionnaire and sampling protocols were finalized, University of Vermont researchers visited survey sites throughout the state to train on-site staff to

administer the survey. Training began with 25 state parks selected for their geographic diversity and high rate of overnight visitation. Surveying began at state parks on June 7, 2012. Nine attraction sites that are members of the Vermont Attractions Association volunteered to participate and were added throughout the summer, with surveying beginning June 21, 2012. Six of the original participating attraction sites close during the winter season. Surveying in welcome centers began on October 15, 2012, and at state craft centers on December 15, 2012. Two additional attraction locations were added in January 2013 and two others were added in June 2013 for a total of 15 attraction sites. The participating state parks, attraction sites and welcome centers are listed in Appendix A of the Final Report.

To help ensure a representative sample of visitors, each survey site was given a list of random times of day (3 times for attraction sites and 4 times for state parks) to conduct the survey. The times fell within the staffed operating hours of each location, and the times changed each day. When the first random time was reached, the first adult person to enter the sampling location was asked to participate in the survey. If that person did not wish to participate in the survey, the next adult from a different visitor group to enter the sampling location was asked to participate. This procedure continued until a member of a visiting group agreed to participate in the survey. Refusals were noted and used to determine the response rate. Beginning October 15, 2012, changes were made to simplify the procedure for staff conducting the survey. Participating survey locations sampled visitors at general times of day (i.e. early morning shortly after opening, late morning, early afternoon and late afternoon) instead of random times. This procedure allowed staff to choose times to solicit visitors for the survey that better met their other job responsibilities. Slight changes to the survey procedure were also made for welcome center staff. A relatively high rate of refusal early in welcome center participation prompted researchers to add a screening procedure for welcome center visitors. Only those visitors who appear to be looking for travel information (either from welcome center staff or by looking at brochure displays) were solicited for participation in the survey.

Visitors who agreed to participate were given a self-administered questionnaire. Completed questionnaires were then returned to the staff member. Completed questionnaires were sent to the University of Vermont in pre-addressed, postage-paid envelopes. Data entry and analysis took place at the University of Vermont. In the case of the computer-based version of the questionnaire, any visitor logging onto the Wi-fi system at welcome centers was asked via the system to participate in the survey. Between June 2012 and February 2014, 8,555 questionnaires were collected from visitors and Vermonters traveling in Vermont for pleasure (Table 1).

Table 1. Number of Completed questionnaires

	<i>Completed Questionnaires</i>
<i>Vermont State Parks</i>	1,866
<i>Welcome Centers</i>	2,661
<i>Attractions sites</i>	4,028
<i>TOTAL</i>	8,555

### **Limitations**

The sample collected for this study has some limitations and must be interpreted carefully. The most important limitation is the relatively small sample of visitors from the winter and spring seasons. These portions of the sample came primarily from the welcome centers and several of the attraction sites that remain open all year long. Since visitors in the winter and spring seasons who come to Vermont to ski may not stop at welcome centers or attractions, it is possible that skiers are underrepresented in this sample. Additionally, a subsample of the study came from Vermont’s State Parks, and it is possible that state park visitors and campers are oversampled.

### **Results**

Detailed results are presented in the form of charts and tables in Appendix D of the Final Report. The charts and tables are in the order they were answered on the questionnaires (see Appendix B for questionnaires). Highlights from the Vermont Visitor Survey are presented below.

#### **Demographics of Visitors and Vermonters Traveling for Pleasure**

Most visitors to Vermont resided in nearby states (Massachusetts, New York, Connecticut). However, visitors came from all 50 states and the District of Columbia and Canada. Few visitors to attractions lived in Vermont (6.5%), while 13% of visitors to Vermont welcome centers and nearly one-third of the visitors to state parks lived in Vermont (30.8%). Most visitors traveled in groups of two adults, most without children. However, Vermont state park visitors were more likely to visit with children. A majority of welcome center visitors (67.4%) and state park visitors (80.7%) visited Vermont previously, while a smaller majority of visitors to Vermont attractions (58.6%) visited previously. Overall, 66.2% of visitors had visited Vermont before. State park visitors were 46 years old on average. On average, welcome center visitors were 54 years old

and attraction visitors were 53 years old. Table 2 shows the age distribution of Vermont visitors.

Table 2. Age distribution of Vermont visitors.

	<i>State Parks</i>	<i>Welcome Centers</i>	<i>Attractions</i>	<i>Overall</i>
	Percentage of Visitors			
<i>Under age 50</i>	59.1	35.4	37.8	42.0
<i>Age 50 and over</i>	40.9	64.6	62.2	58.0

Visitor income tended to skew toward higher income levels, with attractions visitors indicating a higher annual household income than welcome center and state park visitors (Table 3).

Table 3. Household income of Vermont visitors.

	<i>State Parks</i>	<i>Welcome Centers</i>	<i>Attractions</i>	<i>Overall</i>
	Percentage of visitors			
<i>&lt; \$15k</i>	4.6	2.5	2.2	2.9
<i>\$15k-30k</i>	9.6	8.7	5.1	7.2
<i>\$30k-50k</i>	15.7	21.7	12.8	16.1
<i>\$50k-75k</i>	23.1	26.3	21.0	23.1
<i>\$75k-100k</i>	20.2	18.9	21.1	20.2
<i>\$100k-150k</i>	17.4	13.4	19.6	17.3
<i>&gt; \$150k</i>	9.5	8.4	18.2	13.3
<i>Median</i>	\$62,500	\$62,500	\$87,500	\$87,500

## Vacation Planning

### *Influence on Decision to Visit Vermont*

Nearly two-thirds of respondents indicated that the advice of friends and family influenced their decision to travel to Vermont. Other important influences included websites, brochures and magazine articles.

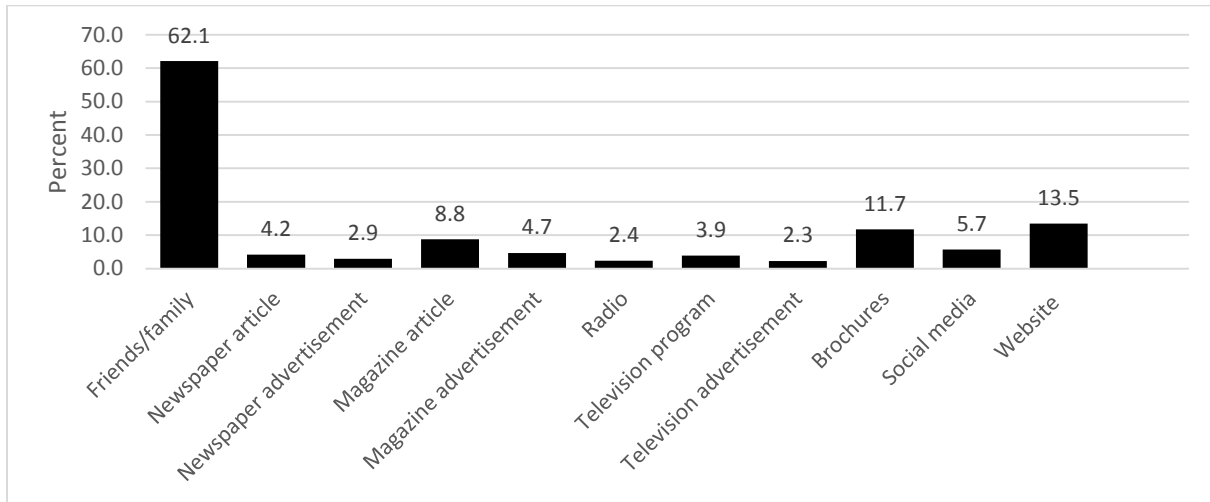


Figure 1. Influence on decision to vacation/travel in Vermont.

Age groups and repeat versus first-time visitors were separated to examine the influence of media on their decisions to vacation/travel in Vermont. Visitors under the age of 50 were more influenced by friends and family and social media than visitors over the age of 50, while visitors over the age of 50 were slightly more influenced by print media than younger visitors. Figure 2 below shows the percentage of visitors who were influenced to visit Vermont by various sources and types of media.

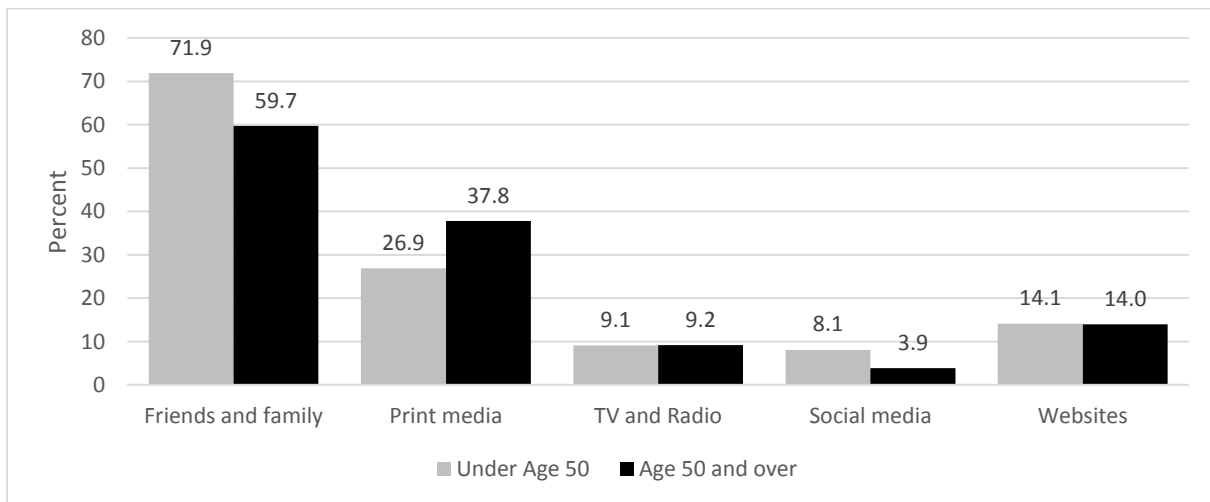


Figure 2. Influence on decision to vacation/travel in Vermont by age groups.

Repeat visitors were more influenced by friends and family than first-time visitors. First-time visitors were slightly more influenced by print media and websites (Figure 3).

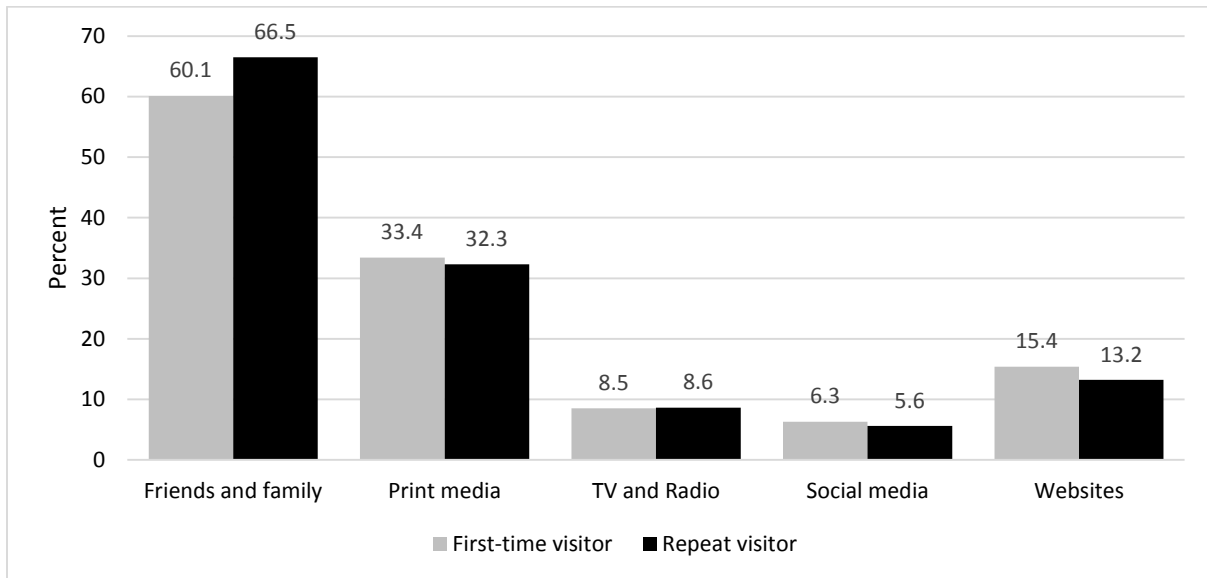


Figure 3. Influence on decision to vacation/travel in Vermont by first-time and repeat visitors.

Print media have an important influence on visitors. Figure 4 shows a breakdown of that category by age for influence on travel decisions. Brochures and magazine articles are the most influential forms of print media for both age groups. However, visitors over the age of 50 are more likely to be influenced by all forms of print media except newspaper advertisements.

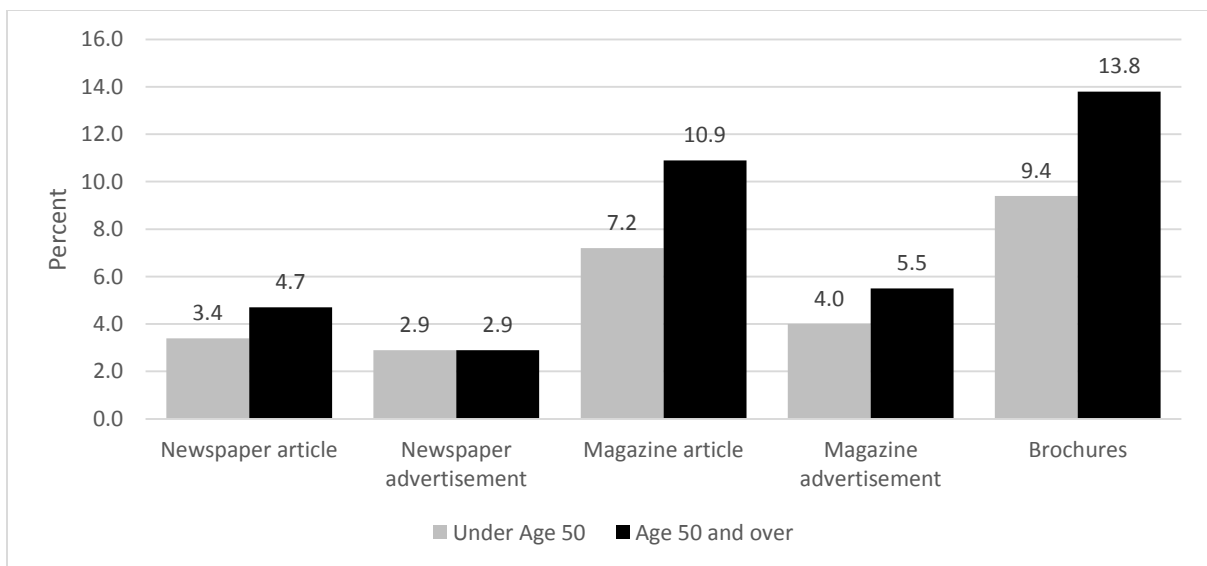


Figure 4. Influence of different types of print media by age group.

### Information Used for Trip Planning

Visitors used websites and the advice of friends and family as their primary sources of information for travel planning. Other important sources of information included brochures, social media and magazine articles (Figure 5).

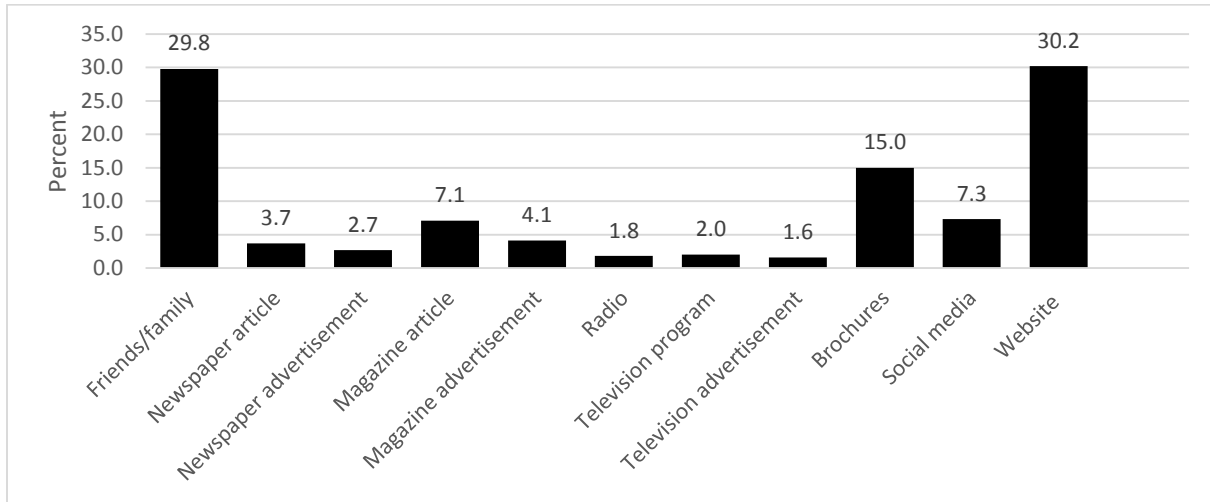


Figure 5. Information used for trip planning.

As in the previous section, age groups and repeat versus first-time visitors were separated to examine which information sources were used to plan travel in Vermont. Websites, print media, and friends/family were the primary sources of information for planning visits to Vermont. There was a slight tendency for visitors under the age of 50 to rely more on information from friends and family and websites, while visitors over the age of 50 were slightly more likely to depend on print media (Figure 6).

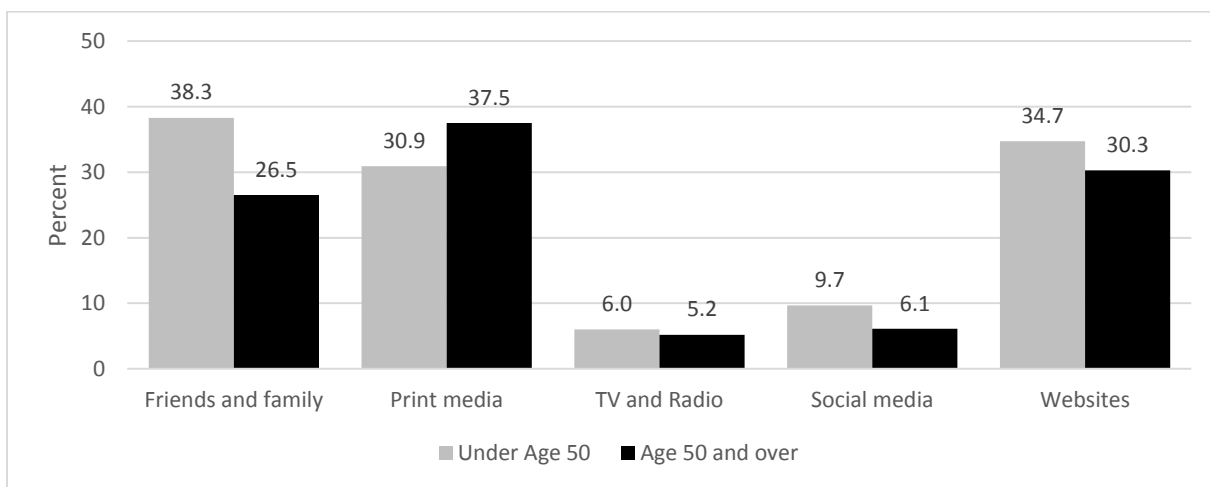


Figure 6. Sources and types of media used for trip planning by age group.



Few substantive differences existed between first-time and repeat visitors in the sources of information they used to plan their trips to Vermont. Slightly more first-time visitors than repeat visitors used websites in trip planning, while slightly more repeat visitors used information from friends and family to plan their trip (Figure 7).

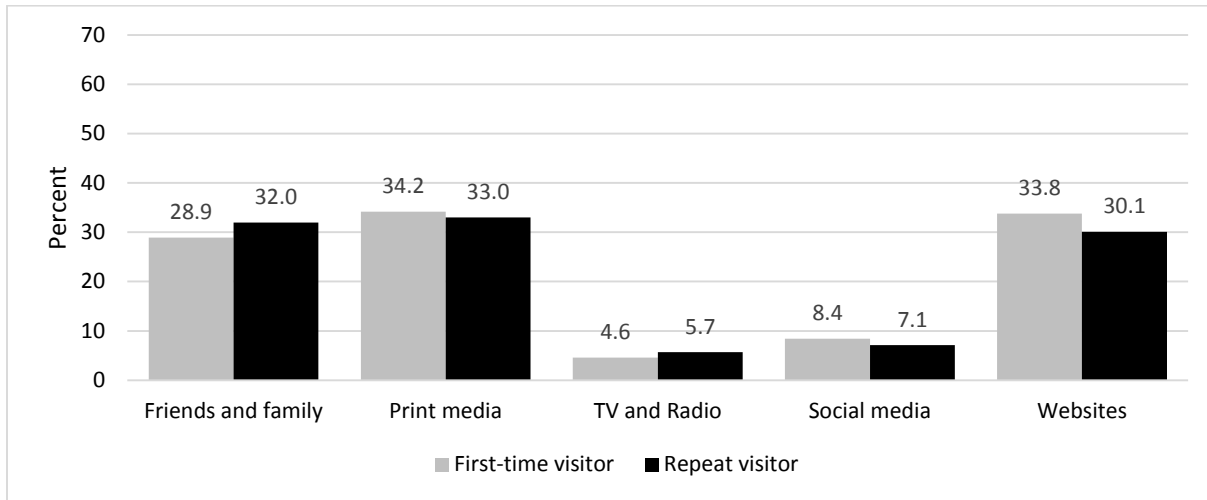


Figure 7. Sources and types of media used for trip planning by first-time and repeat visitors.

Print media are an important source of information for planning visits to Vermont. Figure 8 shows the types of print media used for trip planning by different age groups. Brochures and magazine articles were used most by both age groups, but visitors over the age of 50 were more likely to use most types of print media.

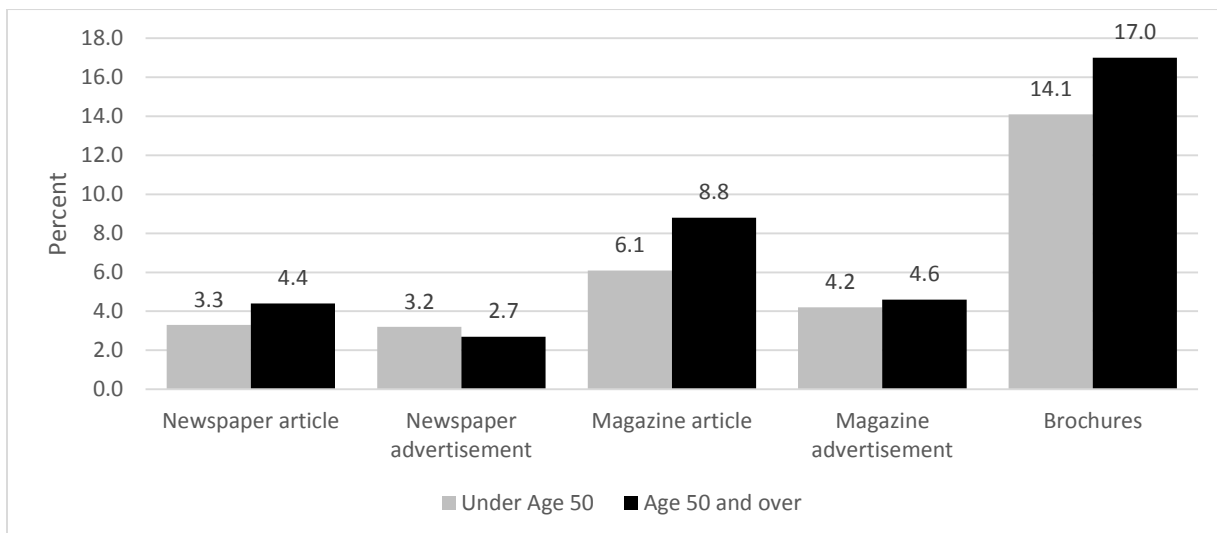


Figure 8. Types of print media used for trip planning by age group.

## Vacation Activities

Visitors participated in a wide variety of activities. State park visitors tended to participate in outdoor activities (hiking/backpacking, sightseeing, canoeing/kayaking, wildlife viewing), while welcome center visitors tended to participate in culturally based activities (sightseeing, shopping, food and drink experiences, farms/farmers markets). Attractions visitors participated in similar activities, but also visited historic sites/museums at higher rates. Table 4 shows the most popular types of activities for Vermont visitors.

Table 4. Popular visitor activities.

	<i>State Parks</i>	<i>Welcome Centers</i>	<i>Attractions</i>	<i>Overall</i>
	Percentage of visitors participating			
<i>Sightseeing</i>	60.0	59.5	85.8	72.8
<i>Shopping</i>	25.9	33.7	56.9	42.9
<i>Food &amp; drink experiences</i>	32.9	30.1	48.0	39.1
<i>Historic sites/museums</i>	22.5	21.3	53.1	36.6
<i>Farms/farmer's markets</i>	30.8	25.5	41.5	34.8
<i>Hiking/backpacking</i>	66.6	19.7	27.7	33.7
<i>Viewing wildlife</i>	44.2	14.4	27.3	27.0
<i>Canoeing/kayaking</i>	41.5	6.1	11.4	16.3

Figure 9 shows which activities were preferred by visitors under the age of 50 and those preferred by visitors over the age of 50. Visitors under the age of 50 were more likely to participate in outdoor activities like hiking or backpacking, while visitors over the age of 50 were more likely to participate in cultural activities like visiting historic sites or museums.

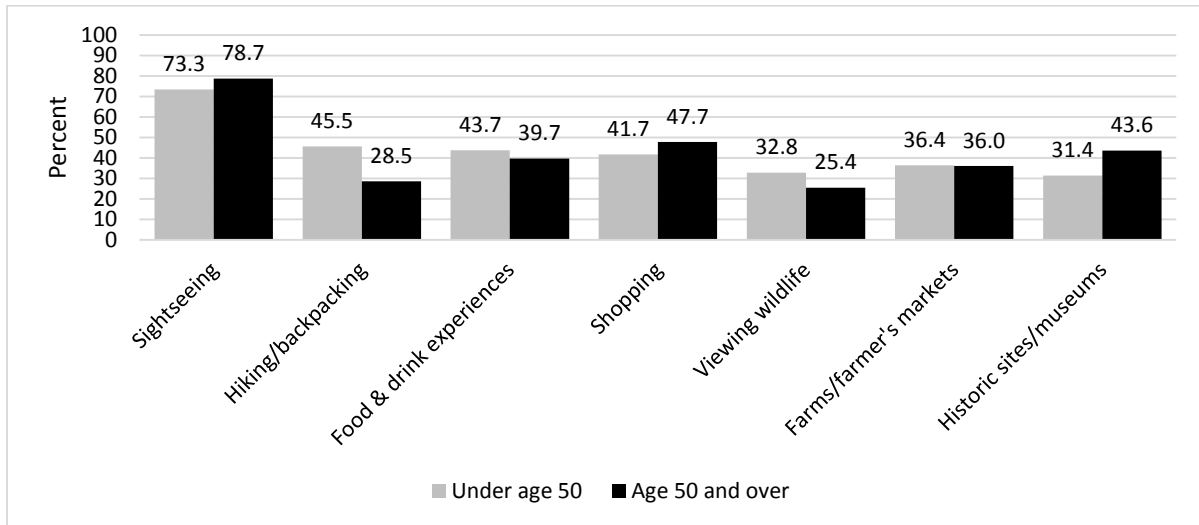


Figure 9. Popular activities by age.

Vermont-made products were purchased by three-quarters of the visitors to attractions (75.0%) and nearly half of the visitors to state parks (45.7%) and welcome centers (41.3%). Visitors intended to purchase a variety of other products and services while in Vermont, with dining being a priority for attraction visitors (62.8%), fuel being a priority for welcome center visitors, and groceries and fuel being priorities for state park visitors (65.8% and 63.0% respectively) (Table 5).

Table 5. Intended purchases in Vermont.

	<i>State Parks</i>	<i>Welcome Centers</i>	<i>Attractions</i>	<i>Overall</i>
	Percentage of Visitors			
<i>VT Products</i>	45.7	41.3	75.0	58.4
<i>Dining</i>	43.2	36.6	62.3	50.2
<i>Gifts</i>	18.3	25.9	50.6	36.1
<i>Admission fees</i>	33.4	15.6	48.7	35.1
<i>Groceries</i>	65.8	25.4	36.0	39.2
<i>Clothing</i>	16.8	18.1	25.9	21.5
<i>Antiques</i>	5.0	11.5	9.9	9.4
<i>Fuel</i>	63.0	39.3	55.8	52.2
<i>Outdoor supplies</i>	31.0	11.6	6.2	13.3
<i>Lift tickets/ski passes</i>	3.1	9.3	4.8	5.8

Visitors rated natural attractions (mountains, wildlife, state parks, lakes, etc.) as the most important type of attraction (Table 6).

Table 6. Visitor ratings of different types of attractions.

	<i>State Parks</i>	<i>Welcome Centers</i>	<i>Attractions</i>	<i>Overall</i>
	Average Visitor Rating Scale range of 1 to 5: 1=Less Important and 5=More Important			
<i>Agricultural</i>	3.4	3.7	3.5	3.5
<i>Cultural</i>	3.2	3.7	3.8	3.7
<i>Seasonal outdoor recreation</i>	4.5	3.7	3.3	3.7
<i>Natural</i>	4.6	4.2	4.2	4.3
<i>Vermont-made products</i>	3.5	4.0	3.9	3.8

### Overnight Travel

Most state park (86.2%) and attractions visitors (84.3%) intended to stay in Vermont overnight. A smaller majority of welcome center visitors (55.1%) intended to stay in Vermont overnight.

Most visitors reserved their lodging accommodations on average about 6 to 9 weeks in advance. However, a substantial percentage reserved accommodations less than a week in advance. State Park visitors tended to reserve their accommodations more than 9 weeks before traveling. Table 7 shows the distribution of how long before traveling visitors reserved their accommodations.

Table 7. Timing of reservations of accommodations by visitors.

	<i>State Parks</i>	<i>Welcome Centers</i>	<i>Attractions</i>	<i>Overall</i>
	Percentage of Visitors			
<i>Less than 1 week</i>	20.5	13.8	24.0	21.8
<i>1 to 2 weeks</i>	10.5	10.6	10.3	10.4
<i>2 to 4 weeks</i>	18.8	27.0	17.4	18.8
<i>4 to 8 weeks</i>	17.0	27.0	21.4	20.6
<i>8 to 12 weeks</i>	7.9	11.1	8.7	8.7
<i>12 to 26 weeks</i>	14.3	5.8	14.2	13.3
<i>26 to 52 weeks</i>	10.4	3.2	3.9	5.9
<i>More than 52 weeks</i>	0.7	1.6	0.2	0.5
<i>Mean (Average) Number of Weeks</i>	9.5	6.4	6.4	7.4

Over half of overnight visitors (52.8% ) stayed in commercial lodging, 14.7% stayed with friends and family, 8.3% stayed in vacation rental properties, 2.8% stayed in owned second or vacation homes, and 30.6% stayed in parks or campgrounds (Table 8).

Table 8. Accommodations while in Vermont.

	<i>State Parks</i>	<i>Welcome Centers</i>	<i>Attractions</i>	<i>Overall</i>
	Percentage of Visitors			
<i>Motel</i>	4.0	15.8	20.2	15.0
<i>Hotel</i>	3.8	17.2	17.8	14.0
<i>Family/friends</i>	7.0	20.8	16.3	14.7
<i>Resort</i>	2.6	15.4	14.3	11.4
<i>Vacation rentals</i>	4.2	5.7	10.8	8.3
<i>Inn</i>	1.4	5.9	8.9	6.3
<i>B&amp;B</i>	1.9	7.6	7.6	6.1
<i>State park campground</i>	85.3	3.5	5.3	26.2
<i>Commercial campground</i>	4.8	3.4	4.5	4.4
<i>Vacation home</i>	1.2	2.8	3.6	2.8

### Travel Patterns

On average, respondents who had made previous visits to Vermont visited 2 to 4 times per year. A large majority of visitors traveled to Vermont in their private vehicles. Visitors often traveled to other destinations while visiting Vermont, particularly nearby states. A majority of state park (79.4%) and welcome center visitors (57.0%) and a substantial plurality of attraction visitors (45.7%) expected to visit Vermont again within a year (Table 9). Very few visitors did not expect to visit Vermont again.

Table 9. When visitors expect to vacation in Vermont again.

	<i>State Parks</i>	<i>Welcome Centers</i>	<i>Attractions</i>	<i>Overall</i>
	Percentage of Visitors			
<i>Within 1 year</i>	79.4	57.0	45.7	56.6
<i>Within 2 years</i>	7.9	14.8	14.8	13.1
<i>Within 3 years</i>	1.4	3.6	4.2	3.4
<i>Don't know</i>	11.0	23.8	34.8	26.4
<i>Never</i>	0.3	0.8	0.6	0.5

Lack of available time was what prevented most visitors from traveling to Vermont more often. All barriers were slightly more pronounced among younger visitors (Figure 10).

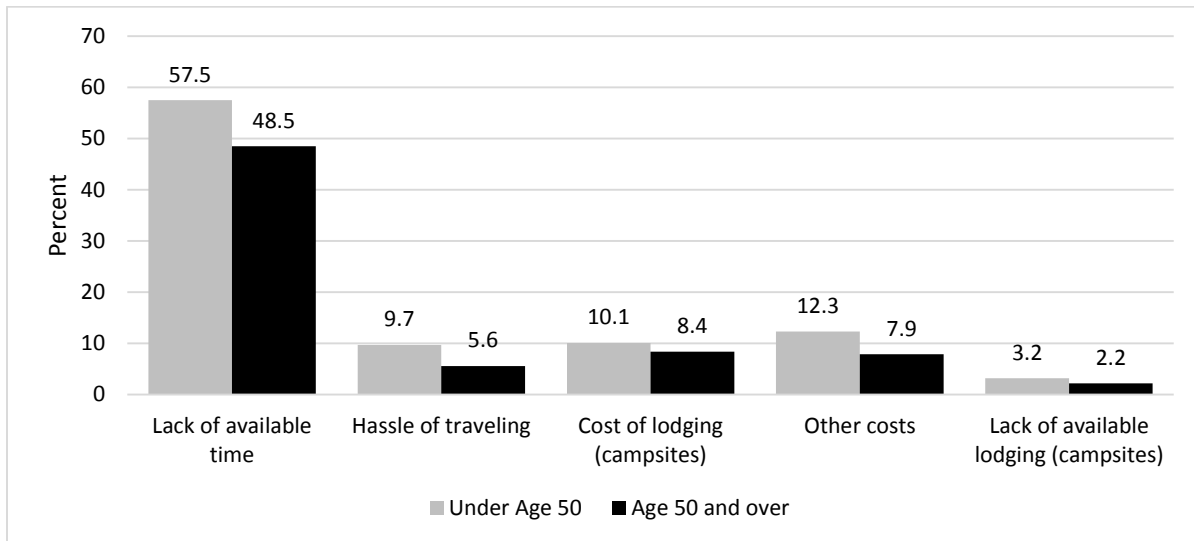


Figure 10. Effect of age on barriers to visiting Vermont more often.

A higher percentage of repeat visitors than first-time visitors indicated that lack of available time was a barrier to visiting more often, while a higher percentage of first-time visitors cited the hassle of traveling as a barrier to more frequent visitation (Figure 11).

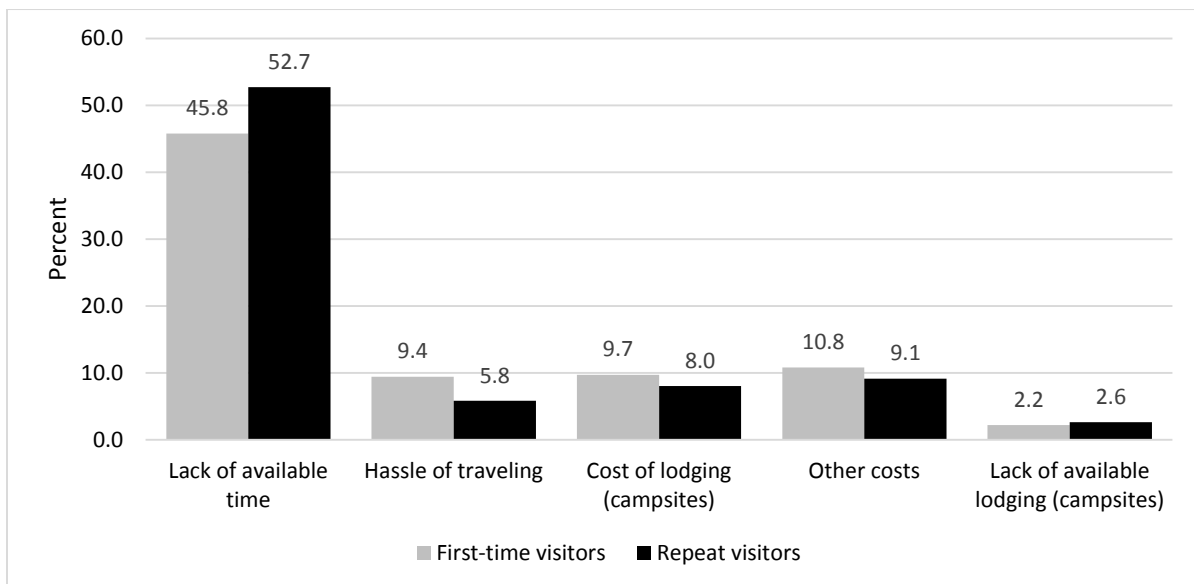


Figure 11. Barriers to visiting Vermont more often for first-time and repeat visitors.

## Conclusions

1. While Vermont received visitors from all 50 states and numerous other countries, most visitors to Vermont lived in nearby states, traveled to Vermont in automobiles, and were relatively affluent.
2. Most visitors planned to stay overnight while visiting Vermont. They tended to stay in commercial lodging, and they reserved their accommodations 6 to 9 weeks in advance. However, a substantial percentage of visitors prearranged their accommodations less than a week in advance.
3. Sightseeing, shopping, and food & drink experiences were some of the most popular activities for visitors of all ages. Younger visitors tended to engage in more active pursuits like hiking and backpacking, while older visitors were more likely to visit historic sites and museums.
4. A majority of visitors took Vermont-made products home with them. The interest in purchasing Vermont-made products often continued after visitors returned to their homes.
5. Visitors indicated that friends and family were their primary influence for visiting Vermont. Thus, marketing Vermont in Vermont may have an influence on visitors from other states.
6. To plan their vacations, visitors used travel information primarily from websites, print media, and friends and family. Visitors under the age of 50 relied more on information from friends and family as well as websites, while visitors over the age of 50 were more likely to depend on print media.
7. Most visitors had traveled to Vermont before and intended to visit again. The primary barrier to visiting more often was lack of available time, especially for visitors under the age of 50. Marketing that emphasizes the close proximity of Vermont and convenience of short visits may help visitors overcome this barrier.
8. Vermonters traveling within Vermont is an important segment of the traveling population. One-third of state park visitors and 15% of welcome center visitors indicated that they are residents of Vermont.
9. Profiles of Vermont visitors by season aid in understanding different needs and expectations across seasons. While many winter visitors come to Vermont to ski, they also enjoy other activities while they visit such as sightseeing, shopping, and dining out. Summer visitors enjoy the natural features that Vermont has to offer by backpacking, canoeing and kayaking, and wildlife viewing. Additionally, Vermont's agricultural and culinary tourism are important to visitors in all four seasons, with farm visits, festivals, and special events taking place throughout the year.

## **Next Steps**

The two-year project described in this report has taken an important step in understanding Vermont's diverse visitor population. Gathering comparable data in the future can ensure that Vermont is meeting the changing needs of visitors. As activities such as mountain biking and culinary tourism become more popular with Vermont visitors, it will be important to understand visitor expectations for those new and evolving activities. Additionally, efforts to gather visitor information in the future can attempt to resolve some of the limitations of this study. For instance, methods can be designed to allow for greater interaction with winter and spring visitors so that larger samples of those groups can be obtained. It may be possible in the future to rely more heavily on emerging technologies like mobile devices to aid in data collection that will allow nearly instant feedback for Vermont decision makers. For these reasons, it will be important to replicate this study in the future.