

VERMONT TOURISM

Full Fall Visitor Tracking Report

October – November 2024
September – October 2025

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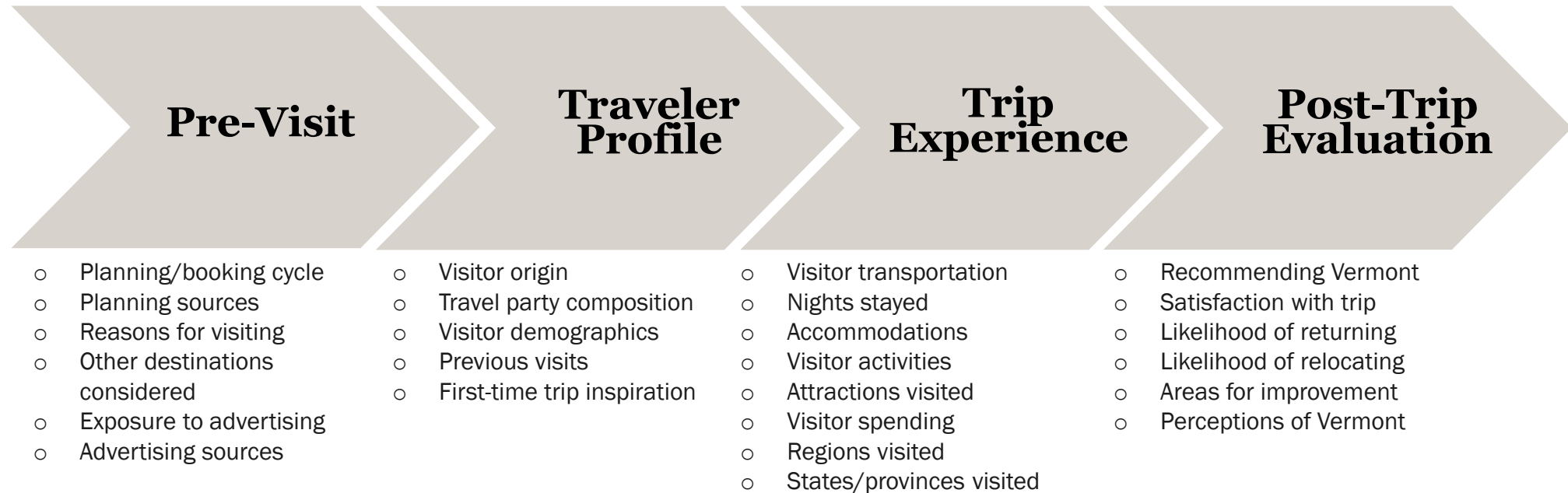
STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to Vermont from October-November 2024 and September-October 2025.

It compiles data collected in late fall 2024 and early fall 2025 to fully represent the average fall visitor.

In the report, we follow the visitors in their journeys from pre-trip planning to post-trip reflections.

Along the way, we examine profiles of visitors, their experiences in Vermont, and how they evaluate those experiences.



SEASONAL SNAPSHOT – FALL 2025

Pre-Visit

- » Visitors come to Vermont in early fall mainly for a **vacation/leisure trip**; in late fall, to **spend time with friends or family**
- » Leisure visitors come to the state chasing the **fall foliage** and looking for a chance to **relax**
- » Vermont's **outdoor activities** and opportunities for **relaxation** convince **early-fall** visitors to choose the state over others, while **late-fall** visitors come to the state because they have **friends or family** there or as part of a **New England states tour**

Traveler Profile

- » Vermont's fall visitors most commonly travel from **New England** or the **Middle Atlantic**
- » Fall visitors tend to travel as a **couple**, though more come to the state in **November** as a **family with children**

Trip Experience

- » Fall visitors spend time in numerous parts of Vermont, but most often visit the **Greater Burlington** and **Upper Green Mountains** regions
- » You can find **September** visitors enjoying the state's **outdoor activities**, **October** visitors **leaf peeping**, and **November** visitors **shopping** or sampling **local food and beverages**

Post-Trip Evaluation

- » In describing Vermont in the fall, visitors emphasize its **unique beauty**, the **friendliness** of its residents, and its **slower pace of life**
- » Most visitors are **satisfied**, would **recommend** Vermont to friends and family, and would **return** for another visit

STUDY METHODS



METHODS OVERVIEW

VISITOR TRACKING

2,090 surveys were completed by visitors to the state of Vermont between October 1st and November 30th, 2024 and between September 1st and October 31st, 2025.

Data was collected online and in person at local attractions, visitor centers, food and drink establishments, museums, shops, downtown areas, and events.



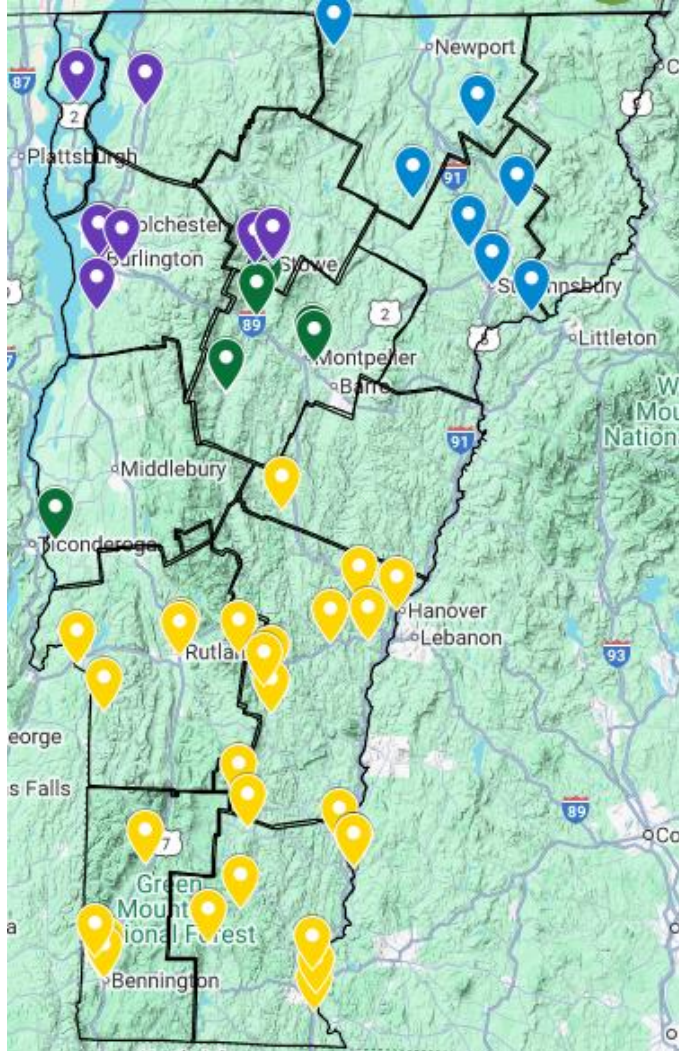
SURVEY SOURCES

Region	Responses	Percent
Northeast Kingdom	535	26%
South	525	25%
Northwest	518	25%
Central	512	24%
Total	2,090	100%

Survey Source	Responses	Percent
Intercept Interview	1,720	82%
Online	289	14%
State Parks Email	44	2%
QR Code	37	2%
Total	2,090	100%

Survey Source Breakdown	Responses	Percent
Intercept Interview	1,720	82%
Attraction or Store	350	16%
Craft Beverages, Food + Farmers Markets	243	12%
Airport	237	11%
Outdoor Rec	180	9%
Museum/Arts & Culture	170	8%
Event	168	8%
Visitor Center	166	8%
Ski resort	94	4%
Downtown	81	4%
Hotel	32	2%
Online	289	14%
State Parks Email	44	2%
QR Code	37	2%
Total	2,090	100%

INTERCEPT SURVEY LOCATION MAP



Northeast Kingdom Survey Sites

- Fairbanks Museum & Planetarium
- Great Vermont Corn Maze
- Hill Farmstead Brewery
- Jay Peak Resort
- Kingdom Trails
- Lake Willoughby
- Downtown St. Johnsbury
- Waterford Welcome Center

Northwest Survey Sites

- Burlington Airport
- Hero's Welcome
- Hotel Vermont
- Church Street Market
- Downtown St. Albans
- Vermont Teddy Bear Factory
- Trapp Family Lodge
- Downtown Stowe
- Burlington Waterfront

Central Survey Sites

- Ben & Jerry's
- Cold Hollow Cider Mill
- Barr Hill Distillery
- Waitsfield Shopping Center
- Champlain Orchards
- Downtown Montpelier

Events

- Fall for St. Johnsbury
- Bean & Brew Festival
- Pumpkin Chuckin' Festival
- Lawson's Oktoberfest
- Wine & Harvest Festival
- Killington Brewfest
- Rutland Foliage Festival
- Heirloom Apple Day
- Rockingham Flannel Festival
- Gilfeather Turnip Festival

South Survey Sites

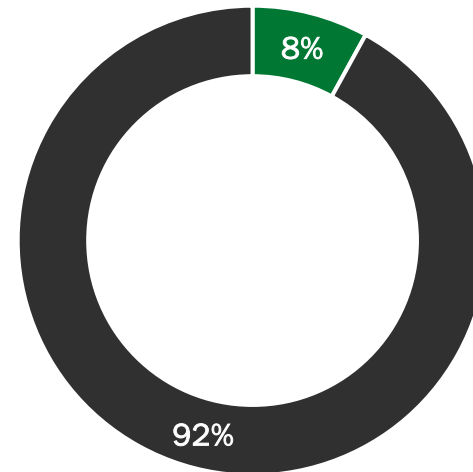
- Bennington Museum
- Bennington Welcome Center
- Billings Farm
- Coolidge Historic Site
- Camp Plymouth State Park
- Fair Haven Welcome Center
- Guilford Welcome Center
- Hildene
- King Arthur Baking Co.
- Lake St. Catherine State Park
- Lowell Lake State Park
- Vermont Country Store
Bellows Falls
- Vermont Country Store
Weston
- Sharon Welcome Center
- Quechee Gorge
- Downtown Bellows Falls
- Downtown Brattleboro

VISITORS JUST PASSING THROUGH

- » This data represents visitors who agreed to take a survey, but indicated they were just passing through Vermont rather than spending time in the state
- » Surveyors did not collect further data from these individuals; data from these individuals is not included in this report outside of this slide
- » **8%** of Vermont's fall visitors **are just passing through** the state on their way to another destination
- » **43%** of visitors encountered at **Vermont Welcome Centers** are just passing through the state

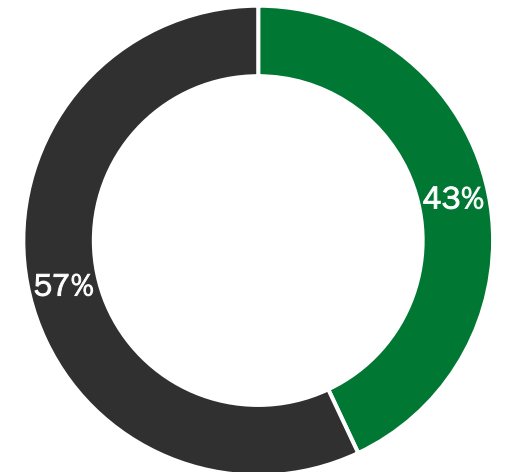
Visitors Only Passing through Vermont

All Visitors Surveyed



- Just passing through
- Spending time in Vermont

Visitors Surveyed at Welcome Centers



- Just passing through
- Spending time in Vermont



DETAILED FINDINGS

VISITOR JOURNEY: PRE-VISIT

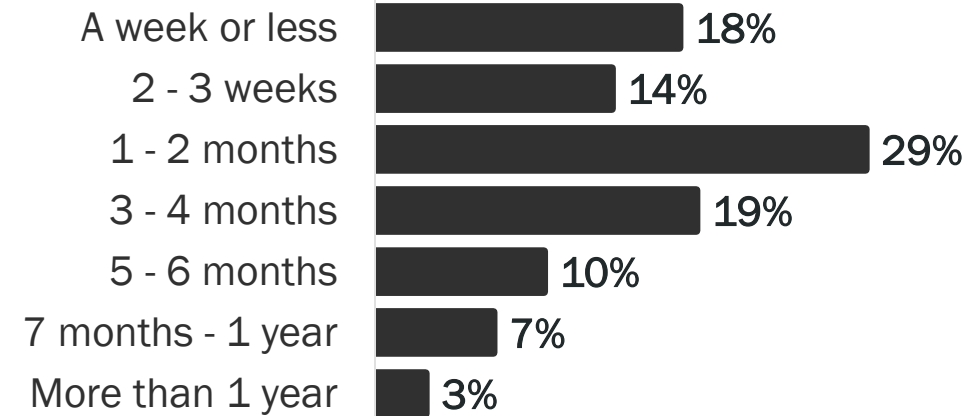


TRIP PLANNING CYCLE

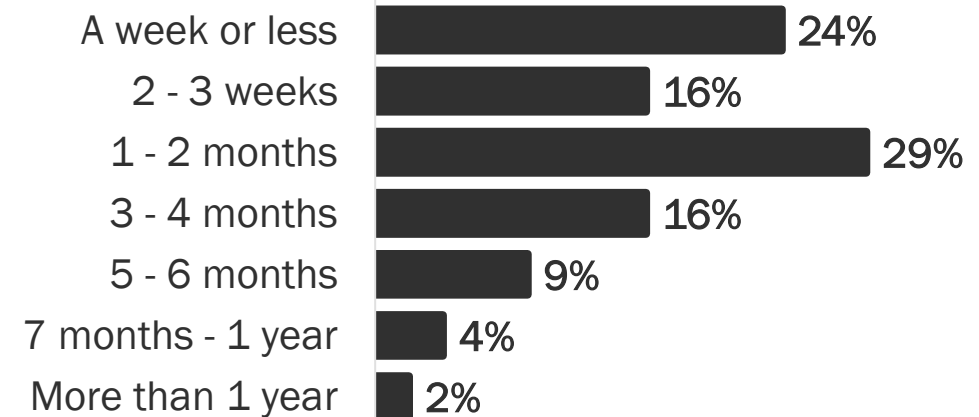
The average fall Vermont visitor spends about **11 days** planning their trip before booking.

- » Typical fall visitors began planning their trip to Vermont **45 days** in advance
- » Typical visitors booked accommodations or definitively decided to take the trip **34 days** in advance
- » **November** visitors have a shorter planning cycle (**30 days**) and booking cycle (**18 days**) than September or October visitors

Beginning of Trip Planning Cycle¹



Booked Accommodations/Made Trip Decisions²



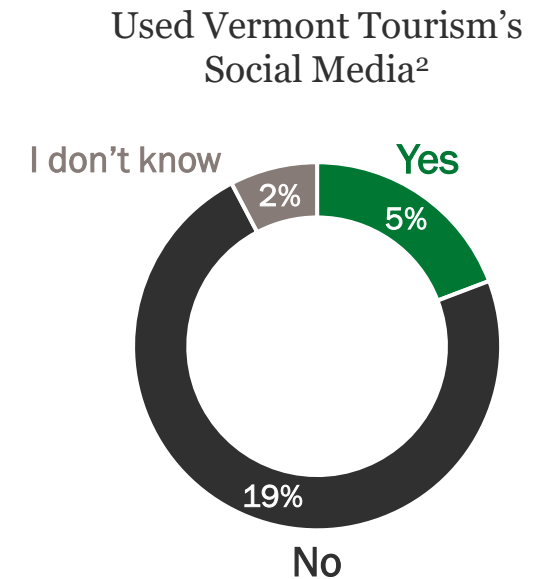
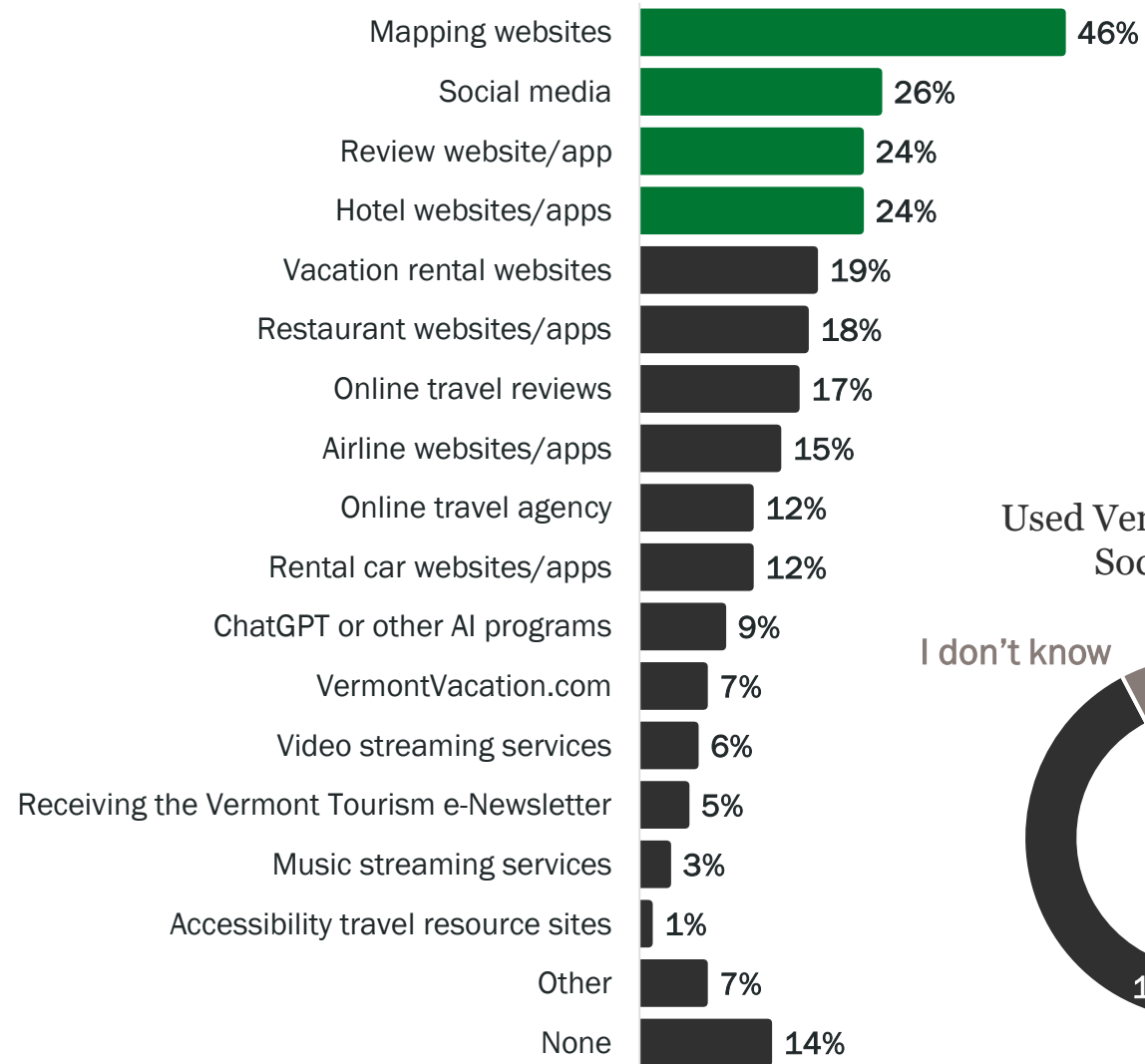
¹ How far in advance did you start planning this trip?

² How far in advance did you book accommodations or definitively decide to take this trip?

ONLINE TRIP PLANNING SOURCES¹

While planning their trips, visitors look for where to stay and how to get around – but they also seek out what others have to say about Vermont.

- » **Mapping websites** are the most-used fall trip planning source by a large margin, used by nearly **half** of visitors
- » **Social media, review websites/apps,** and **hotel websites/apps** are other popular sources, used by around **1 in 4**
- » **5%** of fall visitors used **Vermont Tourism's social media** to help plan their trips



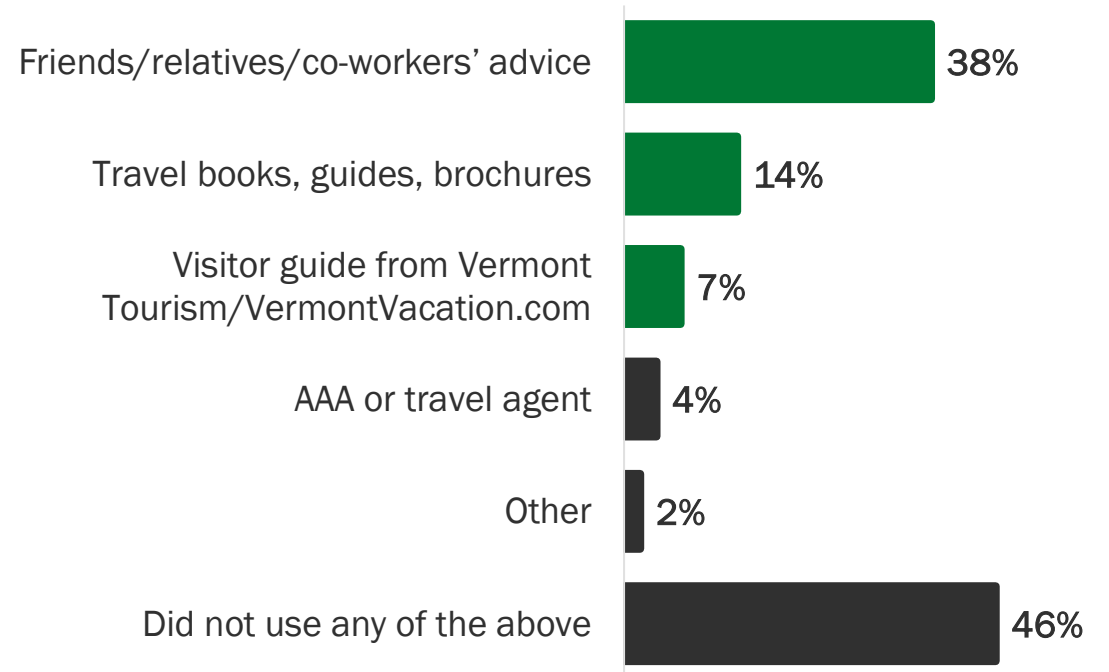
¹ While planning this trip, which of the following online sources did you use? *Multiple responses permitted.*

² You mentioned you used social media as a source to help plan this trip. Did that include Vermont Tourism's official social media? *Percents out of all visitors.*

OTHER TRIP PLANNING SOURCES¹

Over half of Vermont's fall visitors turn to offline resources for information about their trip.

- » **Word of mouth** is the most popular offline trip-planning resource among fall visitors, used by **nearly 2 in 5**
- » **Travel books, guides, and brochures** follow distantly, used by **nearly 1 in 7** visitors
- » **7%** of visitors used **Vermont's Visitor Guide** in their trip planning
- » More **November** visitors used **advice from friends or family** to plan their trip compared to other fall visitors

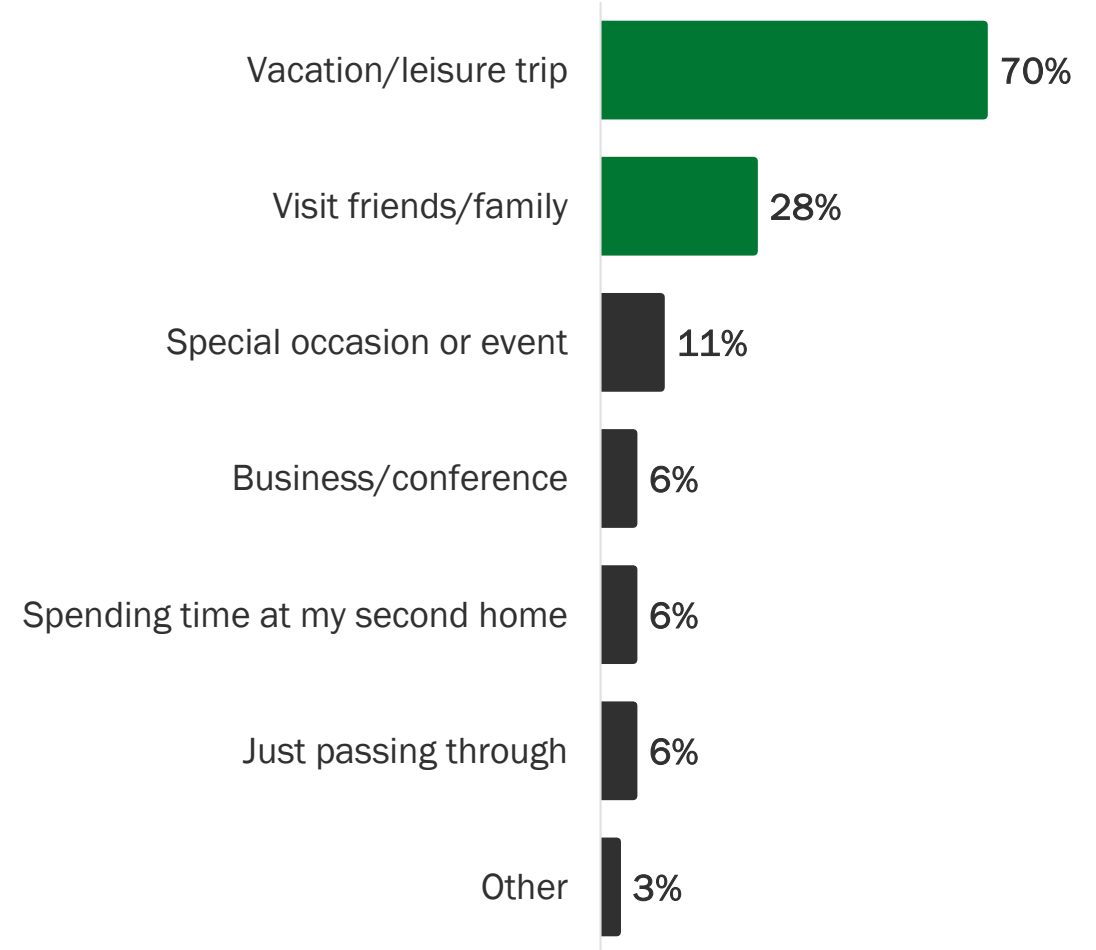


¹ When you were planning this trip, what other sources of information did you use? *Multiple responses permitted.*

REASONS FOR VISITING¹

Leisure emerges as the top reason visitors come to Vermont in the fall, though many also come to see friends or family.

- » **7 in 10** fall visitors came to Vermont for a **vacation/leisure trip**
- » **Nearly 3 in 10** came to the state to **visit friends and family**
- » **November** sees **fewer leisure** visitors and **more** coming to the state to **visit friends or family** compared to the rest of fall

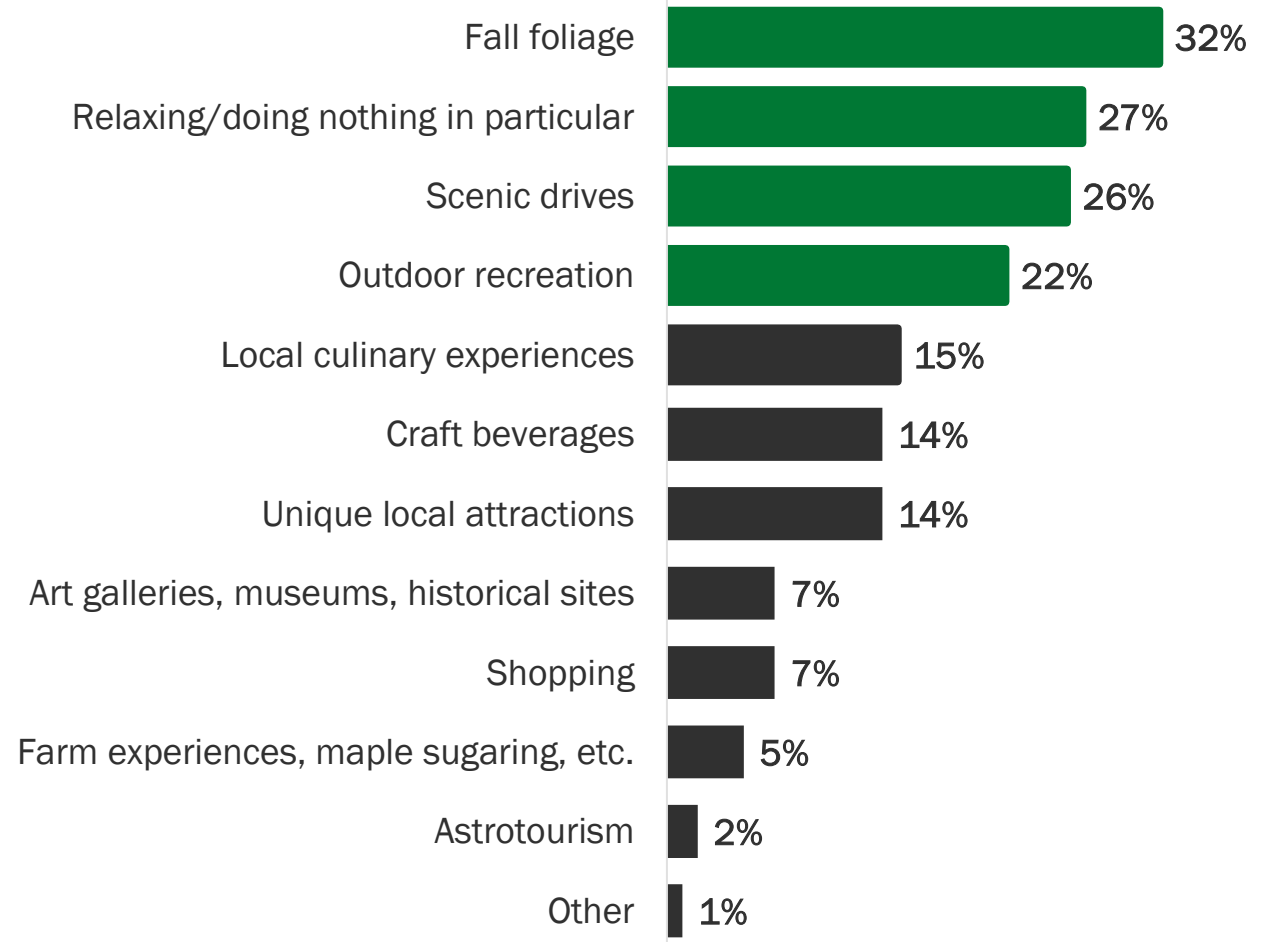


¹ What was your main reason for taking this trip to Vermont? Up to 3 responses permitted.

TYPE OF LEISURE TRIP¹

Breaking leisure visitors down into more specific reasons for visiting:

- » Nearly 1 in 3 visitors came to enjoy the fall foliage
- » Over 1 in 4 came to simply relax or for a scenic drive
- » Over 1 in 5 came to Vermont for its outdoor recreation
- » Compared to the rest of fall, September sees more visitors coming to the state for outdoor recreation and relaxation; October, for the fall foliage; November, for shopping and local food

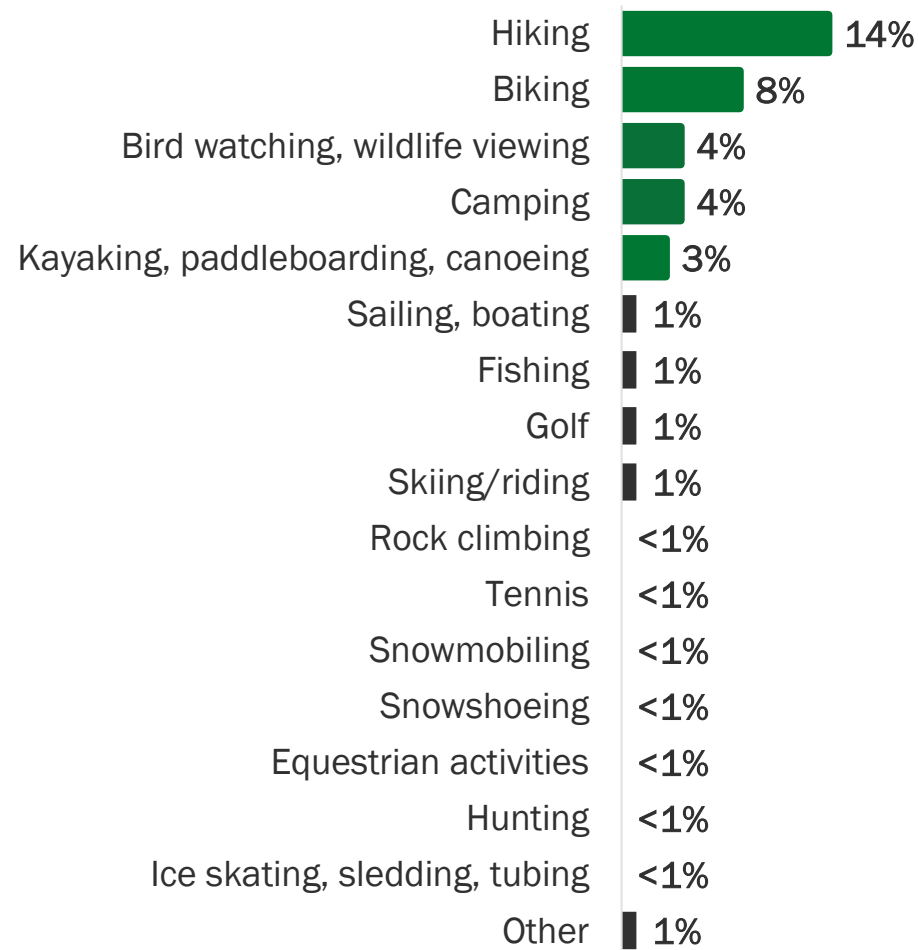


¹ What type of vacation/leisure trip? Multiple responses permitted. Percents out of all visitors.

TYPE OF OUTDOOR RECREATION¹

Breaking down the over 1 in 5 of Vermont's fall visitors who came to the state for its outdoor recreation:

- » The top outdoor recreation draw is **hiking**
 - » Nearly **1 in 7** fall visitors came to the state to hike
- » **Nearly 9 in 10** outdoor rec visitors intended to engage in **more than one** outdoor activity
- » Compared to the rest of fall, **September** sees more outdoor rec visitors coming to the state to camp or spend time on the water



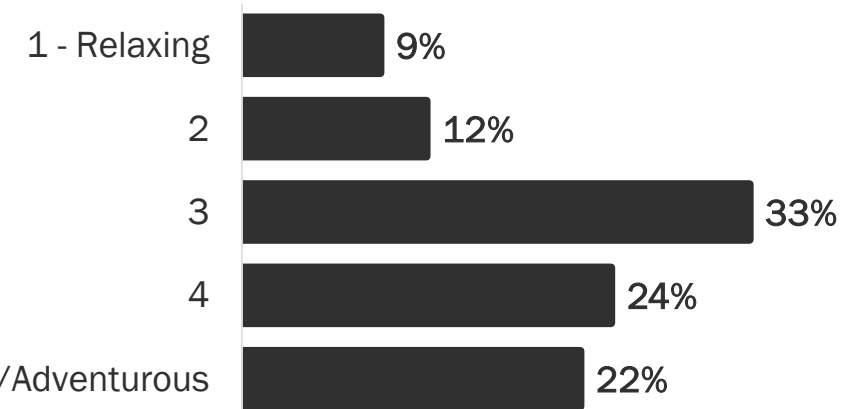
¹ What type of outdoor recreation? Multiple responses permitted. Percents out of all visitors.

RATING OUTDOOR RECREATION¹

Of the over 1 in 5 fall visitors who came to Vermont to spend time outdoors:

- » **Nearly half** rated their outdoor activities as a 4 or 5 (**exhilarating/adventurous** or just a step below)
- » Fewer (**around 1 in 5**) rated their outdoor activities as a 1 or 2 (**relaxing or a step above**)

Outdoor Activity Ratings

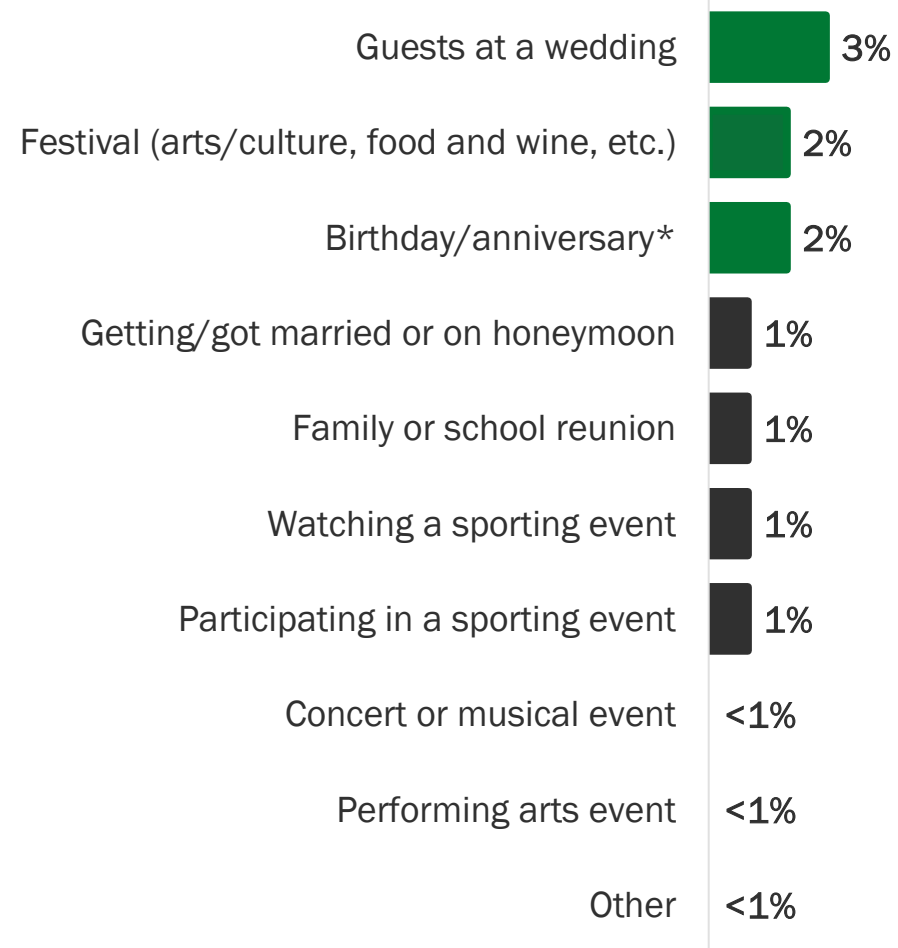


¹ How would you rate your outdoor recreation activities in Vermont, where 1 is relaxing outdoor activities and 5 is exhilarating/adventurous outdoor activities?
Percents out of visitors who came to Vermont for outdoor recreation.

TYPE OF SPECIAL OCCASION/EVENT¹

Special occasions/events brought in over 1 in 10 of Vermont's fall visitors.

» Most of these visitors come to the state to attend a **wedding, festival, or birthday/anniversary celebration.**



¹ What type of special occasion or event? Percents out of all visitors.

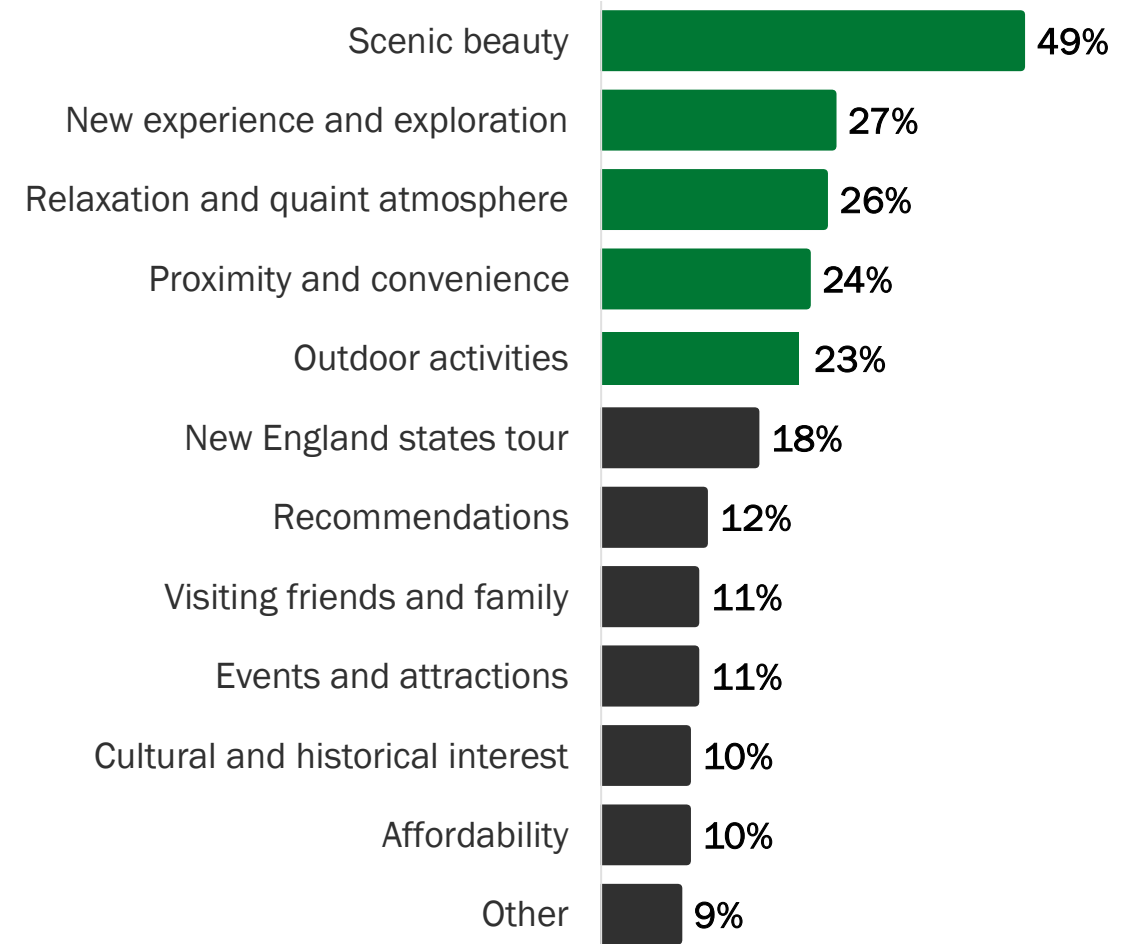
*Coded from "Other" write-in responses.

REASONS FOR CHOOSING VERMONT

17% of fall visitors considered other destinations before choosing to travel to Vermont.¹

- » The state's **scenic beauty** is the **most popular reason** fall visitors choose Vermont over other destinations by a large margin
- » **Over 1 in 4** settled on Vermont for its **opportunities for new experiences** or **relaxation and quaint atmosphere**
- » **Nearly 1 in 4** chose the state for its **convenient location** or **outdoor activities**
- » Compared to other fall visitors, **September** visitors were more likely to choose Vermont for its **outdoor activities** or **opportunities for relaxation**. **November** visitors were more likely to be in Vermont as part of a **New England states tour** or **visiting friends/family**.

Reasons for Choosing Vermont²



¹ Did you consider any other destinations before choosing Vermont for this trip?

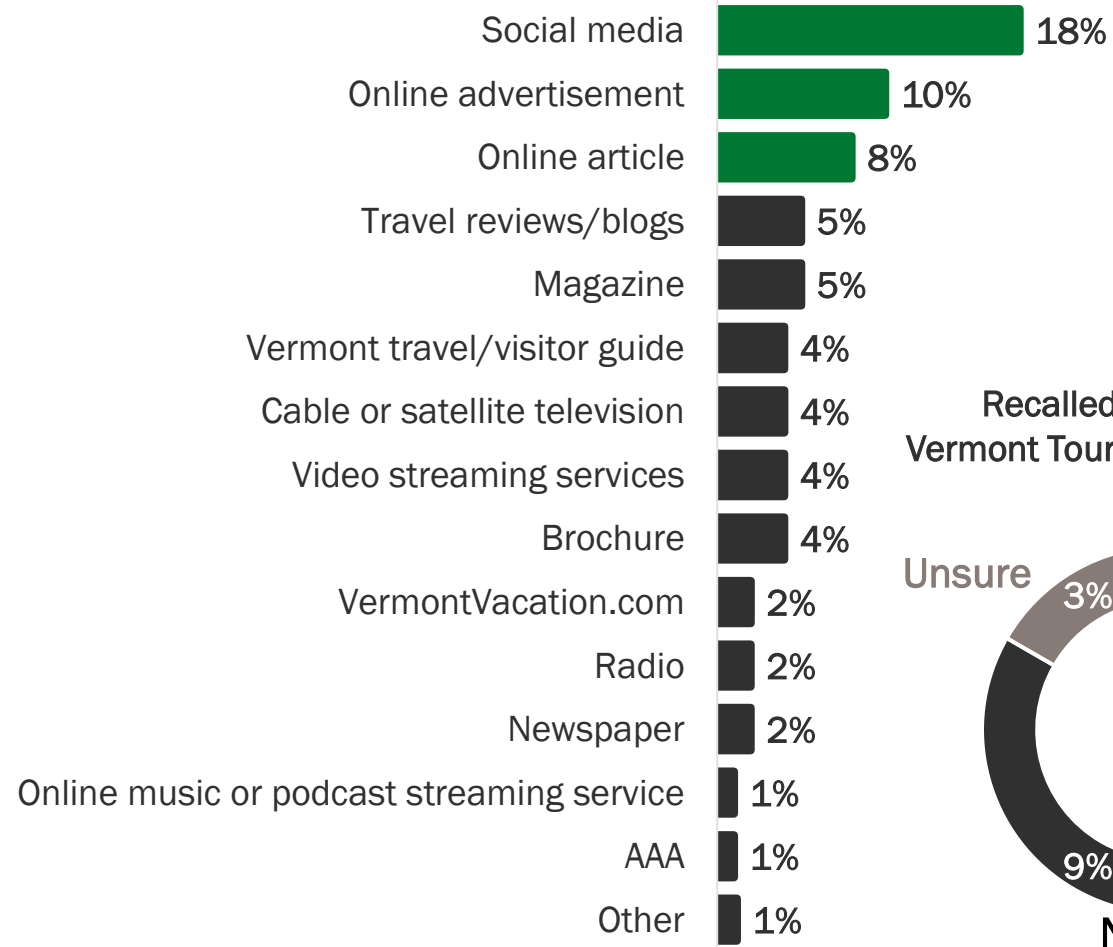
² Why did you choose Vermont over the other destinations you considered? *Multiple responses permitted.*
Percents out of those who considered other destinations.

PRE-TRIP RECALL OF ADVERTISING

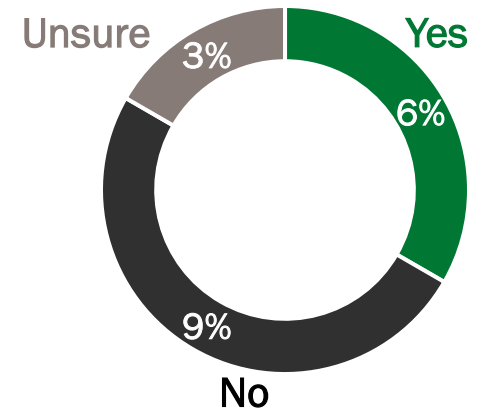
Nearly 2 in 5 fall visitors recalled seeing ads for Vermont before their trip.¹

- » **Social media** was the most common source of ad recall, followed distantly by **online ads** and **online articles**
- » **6%** of all visitors recalled seeing ads on **Vermont Tourism's social media**
- » Compared to other fall visitors, **fewer November** visitors **recalled seeing advertising** for Vermont

Sources of Ad Recall²



Recalled Seeing Ads on Vermont Tourism's Social Media³



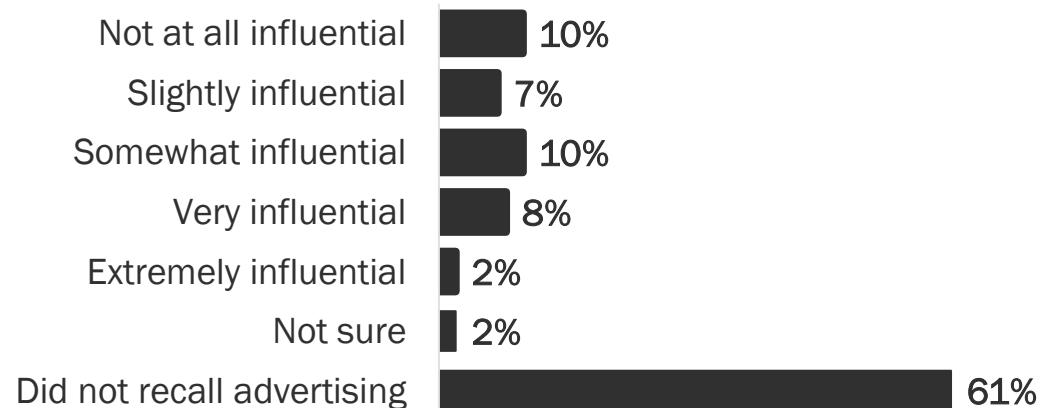
¹Over the past six months, have you seen, read, or heard any travel stories, advertising, or promotions for Vermont?

²Where did you see this information about vacationing in Vermont? *Multiple responses permitted. Percents based on all visitors.*

³You mentioned social media as a source where you recalled information about Vermont. Did that include Vermont Tourism's official social media?

ADVERTISING INFLUENCE¹

- » 20% of visitors found advertising, promotions, or travel stories between somewhat and extremely influential in their decision to travel to Vermont



¹ How influential were these travel stories, advertising, and promotions in your decision to come to Vermont? *Percents out of all visitors.*

PRE-VISIT SUMMARY

TOP DRAWS

WHY VERMONT?

Fall is a season of change in Vermont. September sees the tail end of summer, and with it, visitors coming to the state to sneak in that last bit of outdoor activity before temperatures drop. October's foliage draws leaf peepers and other leisure visitors. And in November visitors come to see friends or family, enjoy Vermont's indoor activities, or check off another New England state.

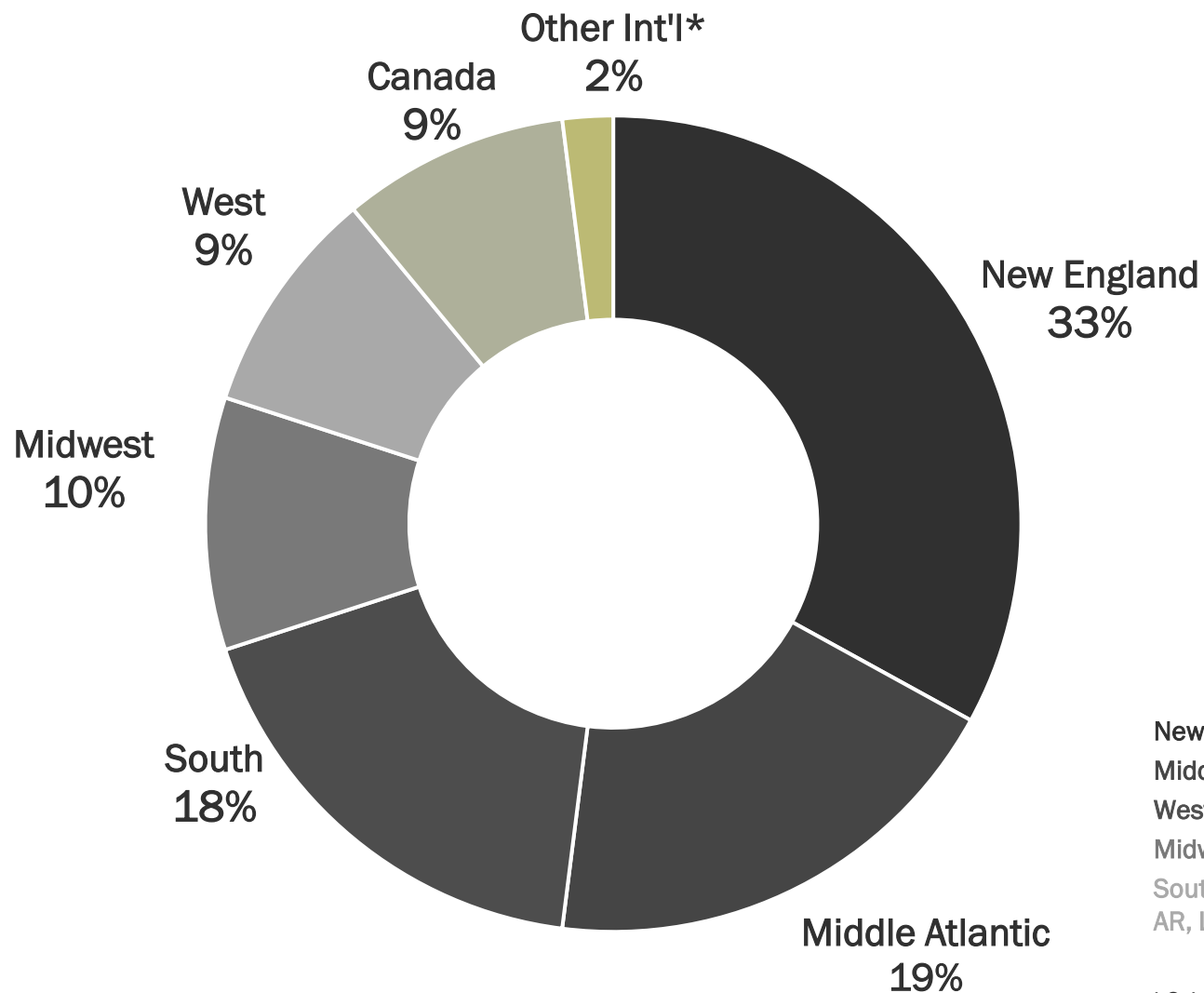
But the theme across the fall season is rest and appreciation of Vermont's unique beauty.



VISITOR JOURNEY: TRAVELER PROFILE



VISITOR ORIGINS



New England: CT, ME, MA, NH, RI

Middle Atlantic: NJ, NY, PA

West: AZ, CO, ID, MT, NV, NM, UT, WY, AK, CA, HI, OR, WA

Midwest: IL, IN, MI, OH, WI, IA, KS, MN, MO, NE, ND, SD

South: FL, GA, NC, SC, VA, DC, MD, DE, WV, AL, KY, MS, TN, AR, LA, OK, TX

*Other top country of origin was the United Kingdom (0.7%).

TOP ORIGIN STATES & PROVINCES

- » **Over 4 in 5** visitors traveled from 16 U.S. states and 2 Canadian provinces
- » Most **domestic** visitors travel from **elsewhere in the northeast**, especially New England
- » **9%** of visitors traveled from **Canada**

State/Province	Percent of Visitors
Massachusetts	15%
New York	11%
Connecticut	7%
New Hampshire	7%
Quebec	7%
Florida	4%
New Jersey	4%
Pennsylvania	4%
Texas	4%
California	3%
Maine	3%
Illinois	2%
Maryland	2%
Minnesota	2%
North Carolina	2%
Ohio	2%
Virginia	2%
Ontario	2%
Other states and provinces ¹	17%

TOP ORIGIN MARKETS

- » **Half** of fall visitors traveled from **11** U.S. markets
- » Fall visitors most commonly travel to Vermont from the **Boston** or **New York** areas

U.S. Market	Percent of Visitors
Boston	13%
New York ¹	9%
Hartford-New Haven	6%
Albany-Schenectady-Troy	4%
Springfield-Holyoke	4%
Philadelphia	3%
Portland-Auburn	3%
Burlington-Plattsburgh	2%
Los Angeles	2%
Providence-New Bedford	2%
Washington, DC-Hagerstown ²	2%
Other markets ³	50%

¹ Includes some markets in New Jersey, Pennsylvania, and Connecticut.

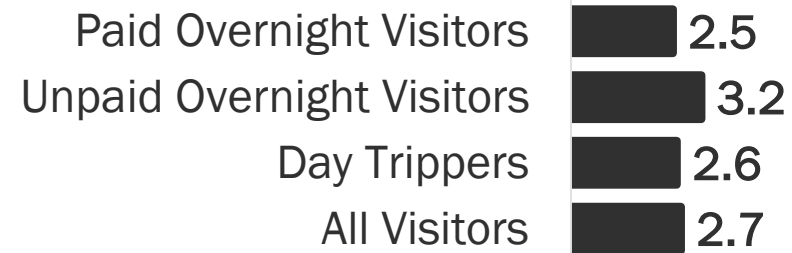
² Includes some markets in Maryland, Virginia, and West Virginia.

³ Fewer than 2% of visitors traveled from each other market.

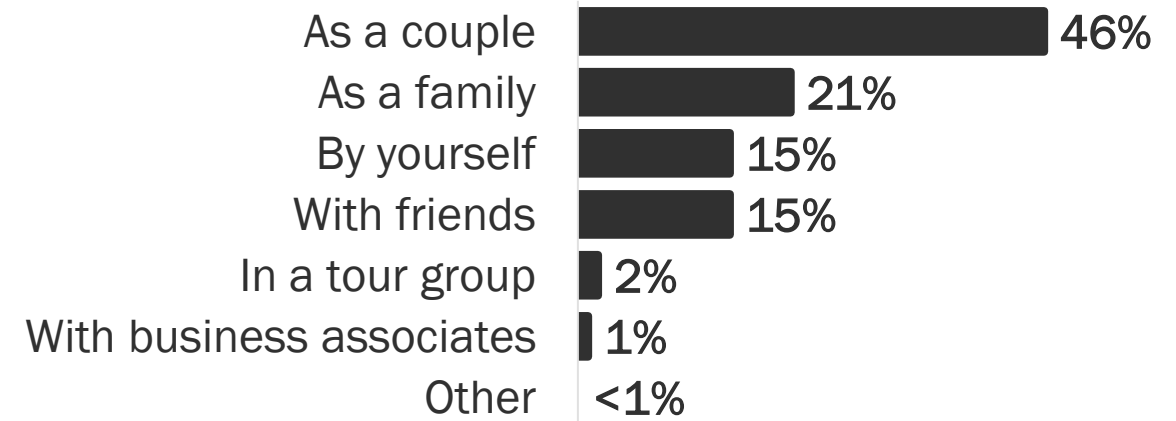
TRAVEL PARTIES

- » Typical visitors traveled to Vermont in **parties** of **2.7¹ people**
 - » Unpaid overnight visitors (those staying with friends, family, or in a personal second home) travel in the largest parties
 - » Paid overnight visitors (those staying in paid accommodations) travel in the smallest parties
- » **14%** of fall visitors traveled with one or more **children⁴** in their travel party
- » Compared to other fall visitors, **September** visitors are more likely to travel **as a couple**; **November** visitors, **as a family**

Travel Party Size by Visitor Type²



Travel Party Composition³



¹ Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

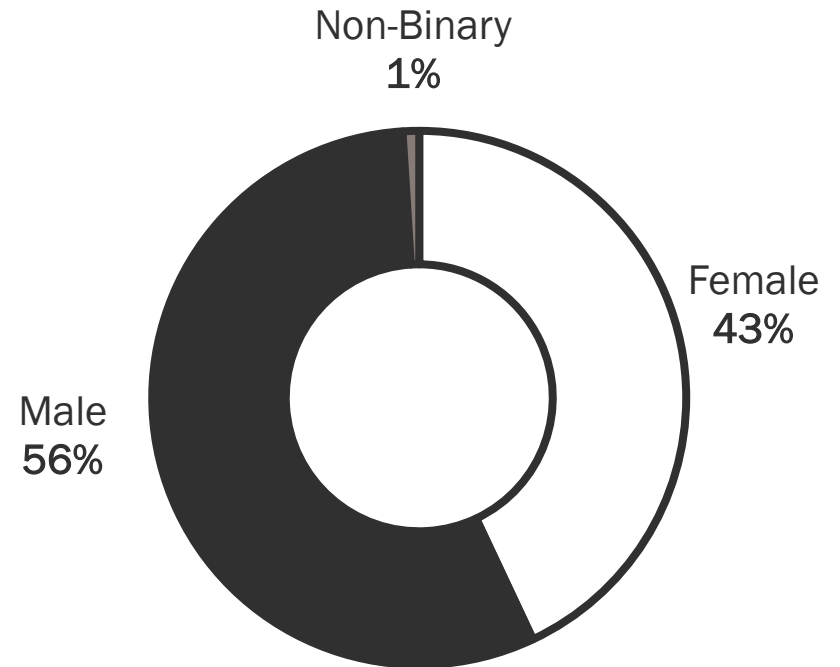
² Including yourself, how many people were in your immediate travel party on this specific trip in Vermont?

³ On this trip, are you traveling:

⁴ Were there any children in your immediate travel party on this trip?

GENDER¹

- » Nearly **3 in 5** fall visitors to Vermont interviewed were **males**
- » This demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

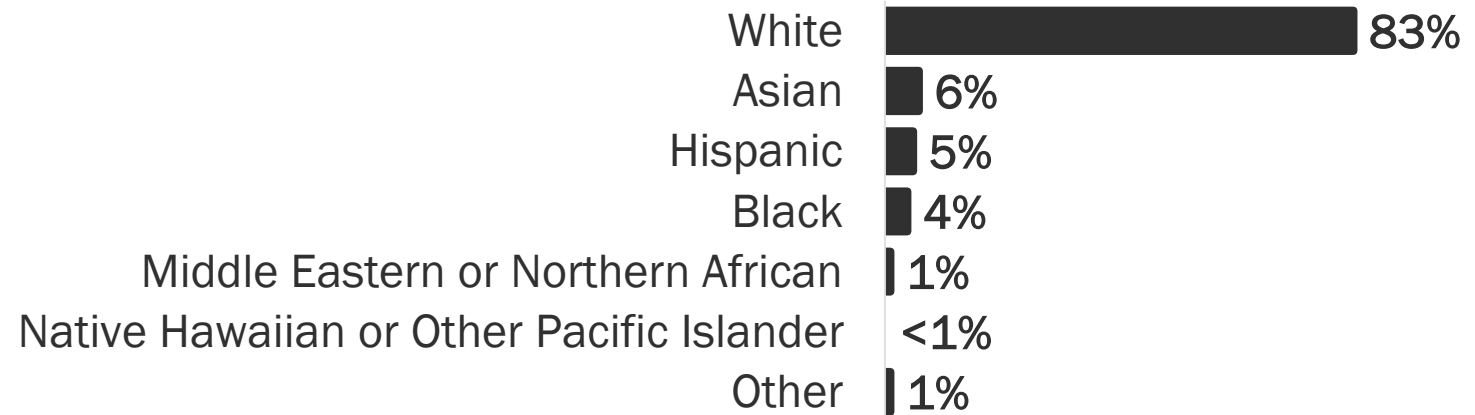


¹ How do you identify your gender?

RACE & ETHNICITY¹

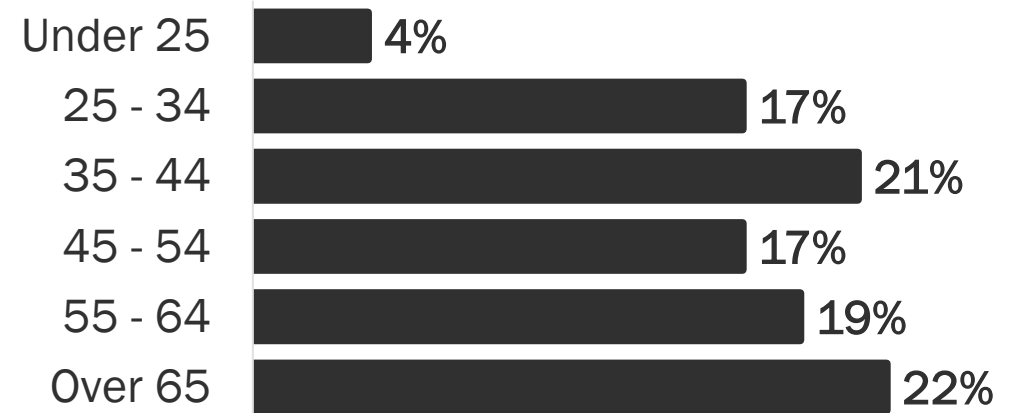
» **Over 4 in 5** fall visitors to Vermont identified their race as **White/Caucasian**

» This demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.



¹ How do you identify your race/ethnicity?

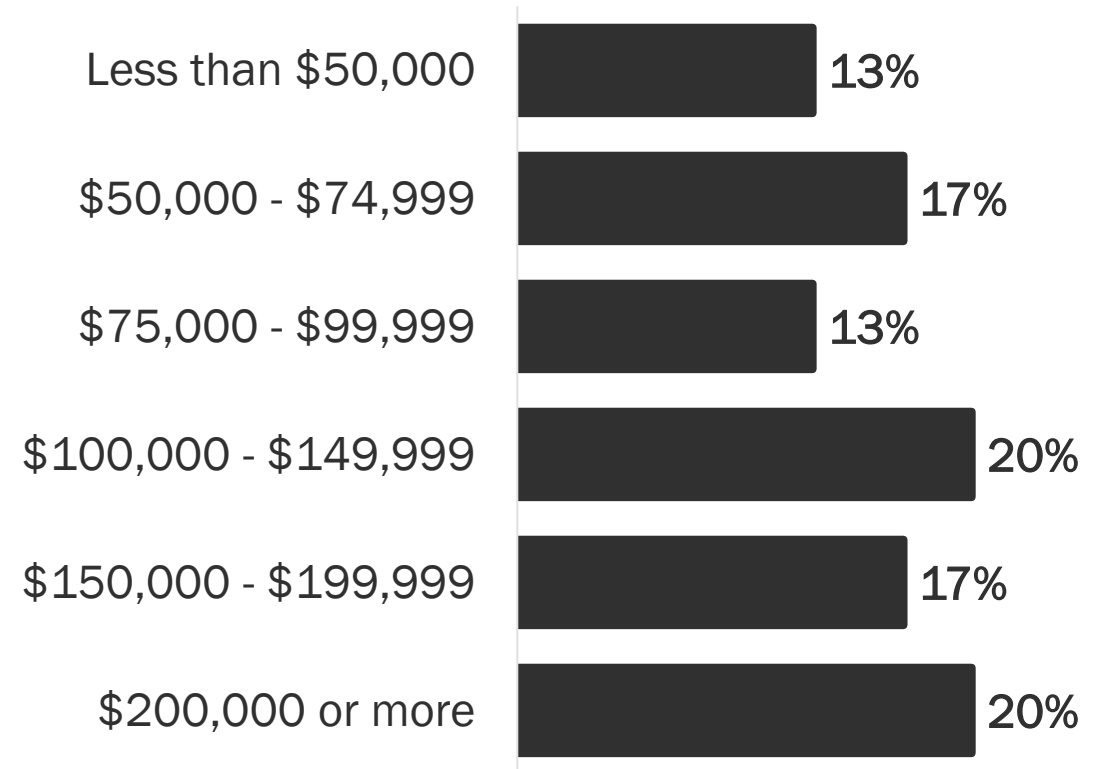
- » The median **age** of adult fall visitors to Vermont who participated in this survey on behalf of their travel party is **49** years old
- » This demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.



¹ Which category best fits your age?

HOUSEHOLD INCOME¹

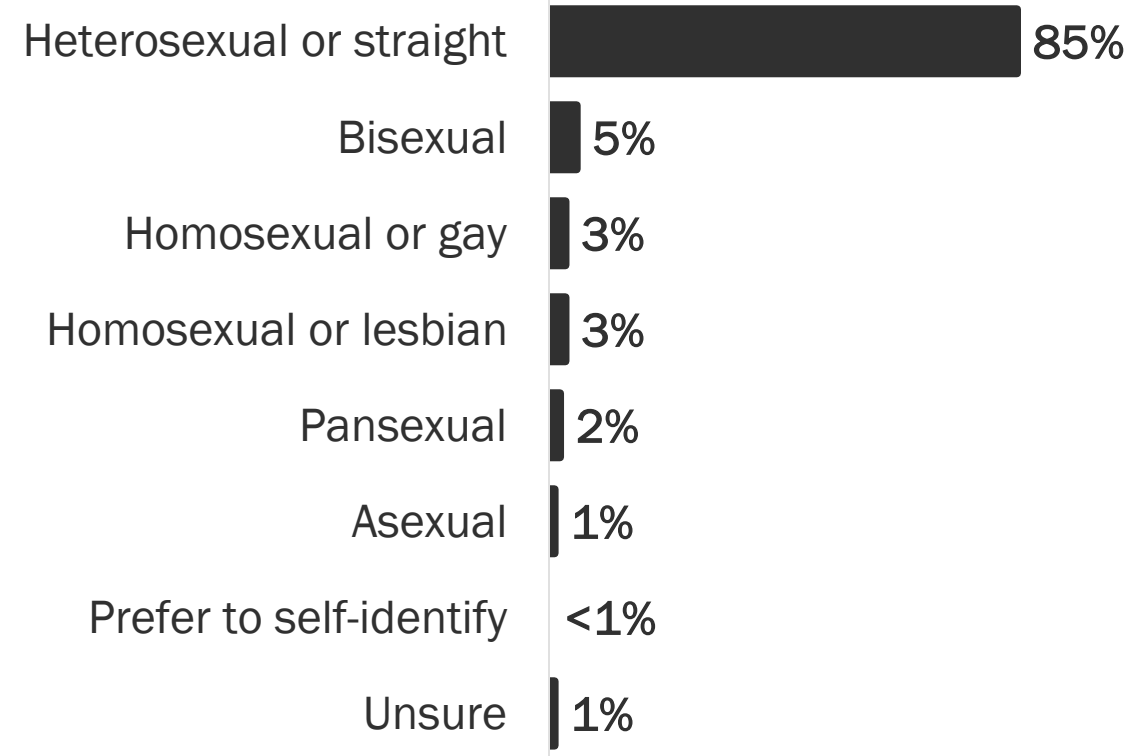
- » The median annual household **income** of fall visitors to Vermont is **\$117,500**
- » **Nearly 3 in 5** fall visitors to Vermont earned **\$100,000 or more** per year
- » **1 in 5** earned more than **\$200,000**



¹ Which category best fits your total household income last year from all sources?

SEXUAL ORIENTATION¹

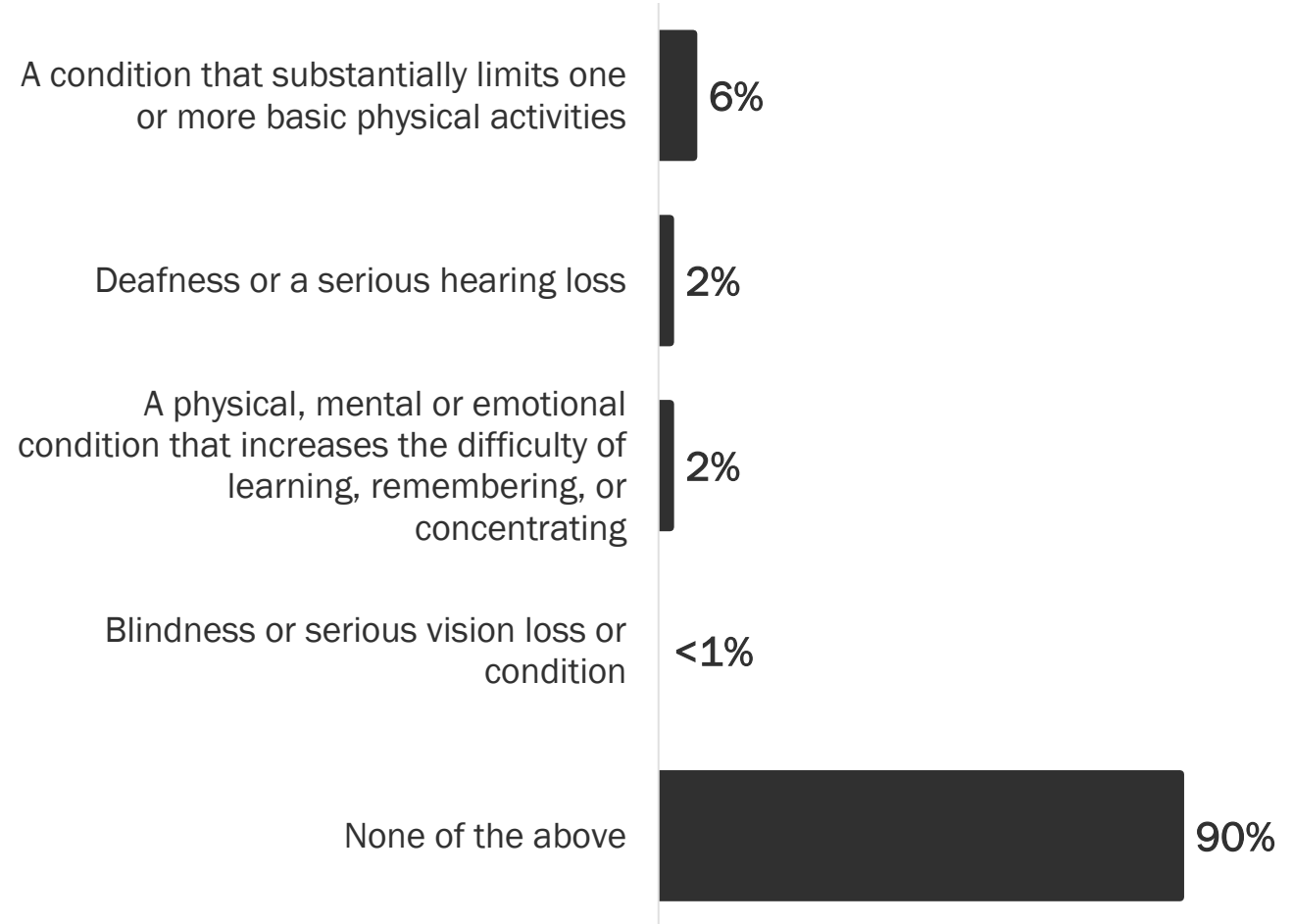
- » **Over 4 in 5** fall visitors to Vermont considered themselves **heterosexual** or straight
- » **15%** did **not** consider themselves heterosexual
 - » **5%** considered themselves **bisexual**
 - » **6%** considered themselves **gay or lesbian**
- » This demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.



¹ Which of the following do you consider yourself to be?

DISABILITY¹

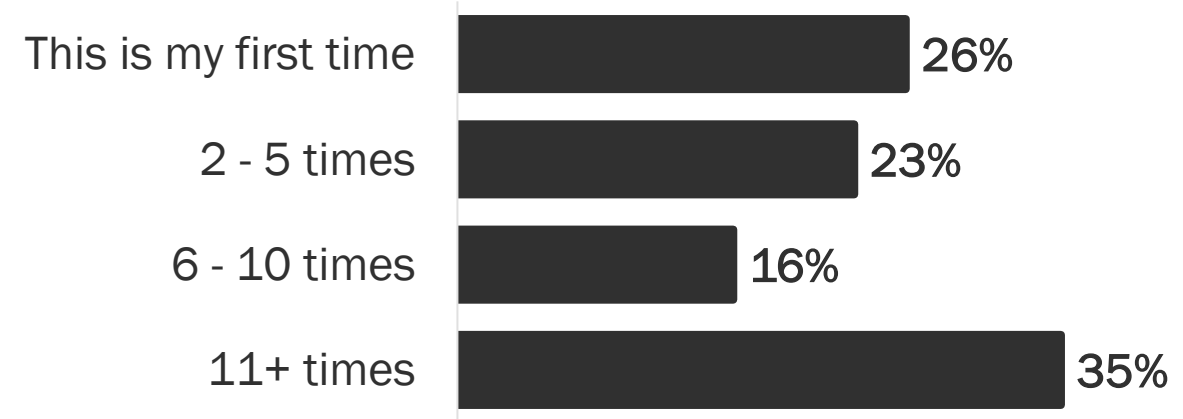
- » **1 in 10** fall visitors to Vermont reported having a long-lasting condition, disability, functional limitation or health problem
- » The most common disability was a condition **limiting physical activities**, reported by **6%** of visitors



¹ Does anyone in your travel party have any of the following long-lasting conditions, disabilities, functional limitations or health problems? *Multiple responses permitted.*

NEW & RETURNING VISITORS¹

- » Over 1 in 3 fall visitors had been to Vermont more than 10 times
- » That said, over 1 in 4 were in the state for the first time
- » Compared to the rest of fall, October sees the most first-time visitors; November, the fewest

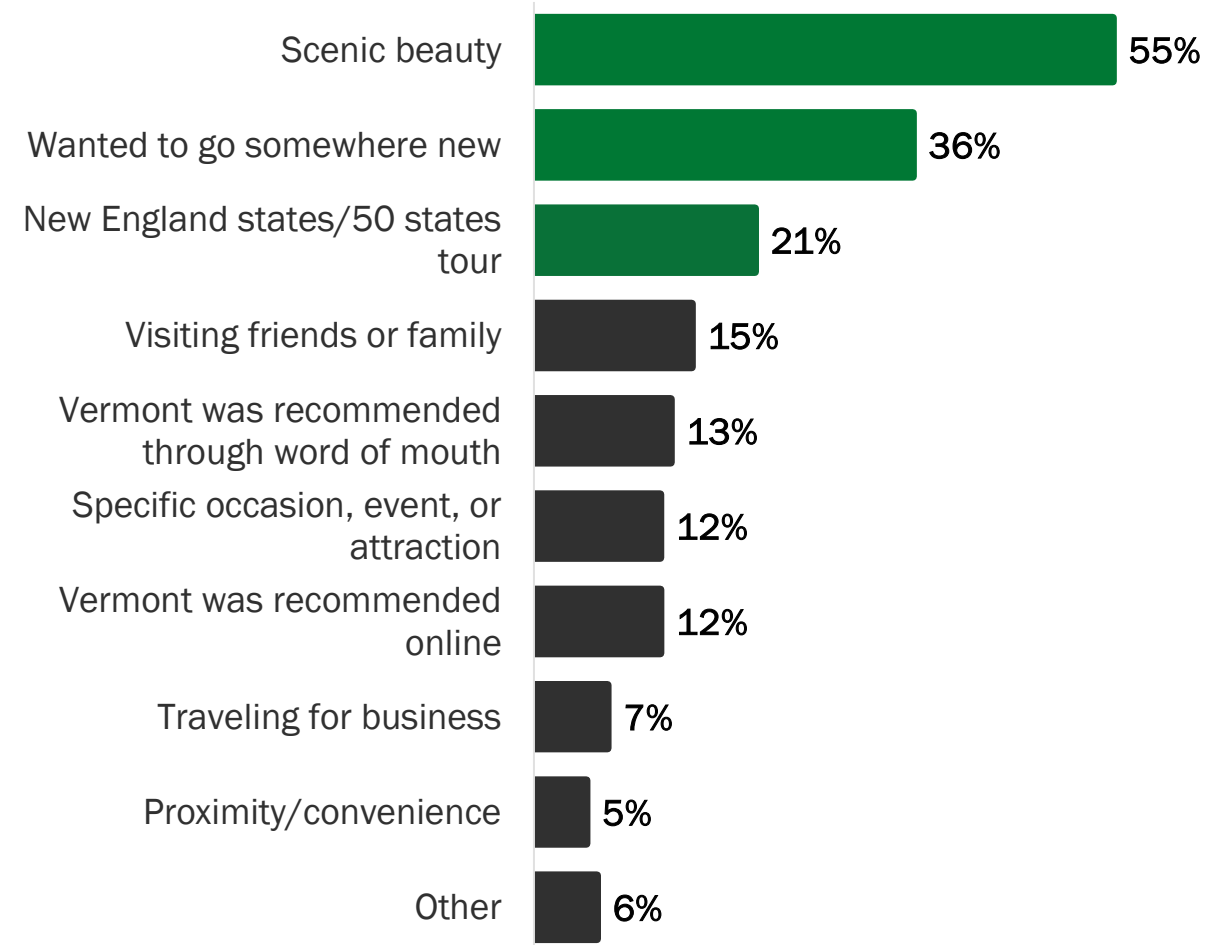


¹ Approximately how many times have you visited Vermont?

REASONS FOR FIRST TRIP TO VERMONT¹

Of the 26% of Vermont's fall visitors who were in the state for the first time:

- » **Over half** came to Vermont for its **scenic beauty**
- » **Over 1 in 3** wanted to **go somewhere new**
- » Another **over 1 in 5** visited Vermont to **tour the New England states or all 50 states**
- » **October** visitors are more likely than other first-time fall visitors to come to Vermont for its **scenic beauty**; **September** visitors, because they want to **go somewhere new**; **November** visitors, because they have **friends/family** in the state or for a **specific occasion**.



¹What inspired this first trip to Vermont? Multiple responses permitted. Percents out of those who were visiting for the first time.

VISITOR PROFILE SUMMARY

VERMONT'S FALL VISITOR WHO ARE THEY?

Fall draws visitors to Vermont for a once-in-a-lifetime trip. They've always wanted to make it to the northeast to see the fall color and have finally pulled the trigger. Many have never been to Vermont so this is their first chance to experience what it has to offer. And they are willing to fly in from other parts of the country or of the world to do so.

Others live nearby and come in early fall for a convenient place to camp and spend time on the water or in late fall to see friends and family in the area. They have been to the state before, often many times, and will likely return.



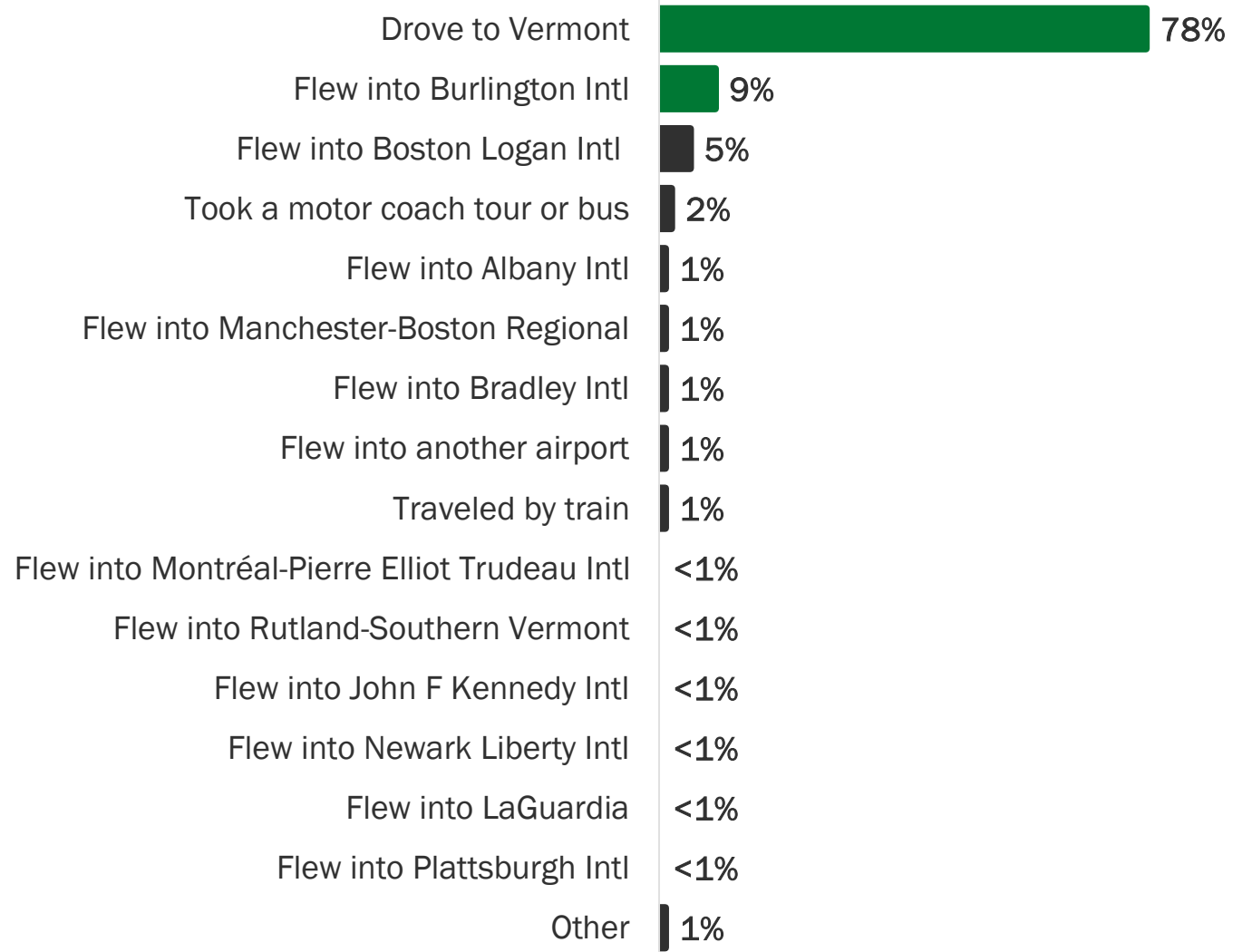
VISITOR JOURNEY : TRIP EXPERIENCE



MODES OF TRANSPORTATION¹

Vermont is a drive market for most visitors.

- » **Nearly 4 in 5** chose to **travel by car** over plane, motor coach/bus, or train
- » **5%** of all visitors drove to Vermont in a **fully-electric vehicle** (EV)²
- » Most visitors who **fly** to Vermont arrive at **Burlington International Airport**



¹ What was your primary mode of transportation on this trip?

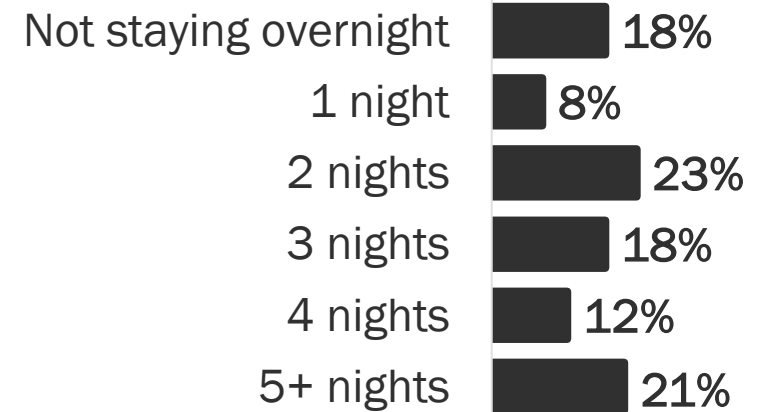
² Was your vehicle a fully electric vehicle (EV)?

NIGHTS STAYED¹

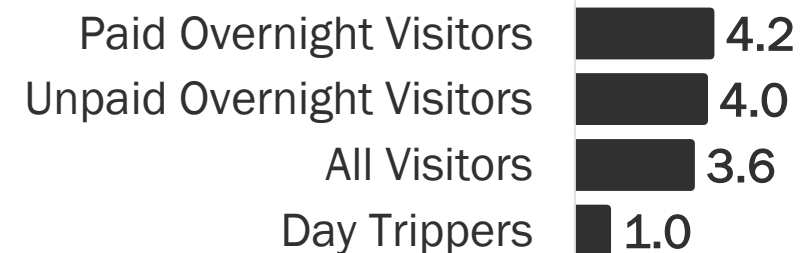
Over 4 in 5 fall visitors stayed **one or more nights** in Vermont on their trip.

- » Typical visitors stayed **3.6 nights**² in the state
- » Typical visitors staying overnight in **paid accommodations** stayed **4.2 nights**
- » For visitors staying in a **hotel**, the average length of stay was **3.1 nights**. For those staying in a **vacation rental**, it was **4.1 nights**.

Nights Stayed Breakdown



Nights Stayed by Visitor Type



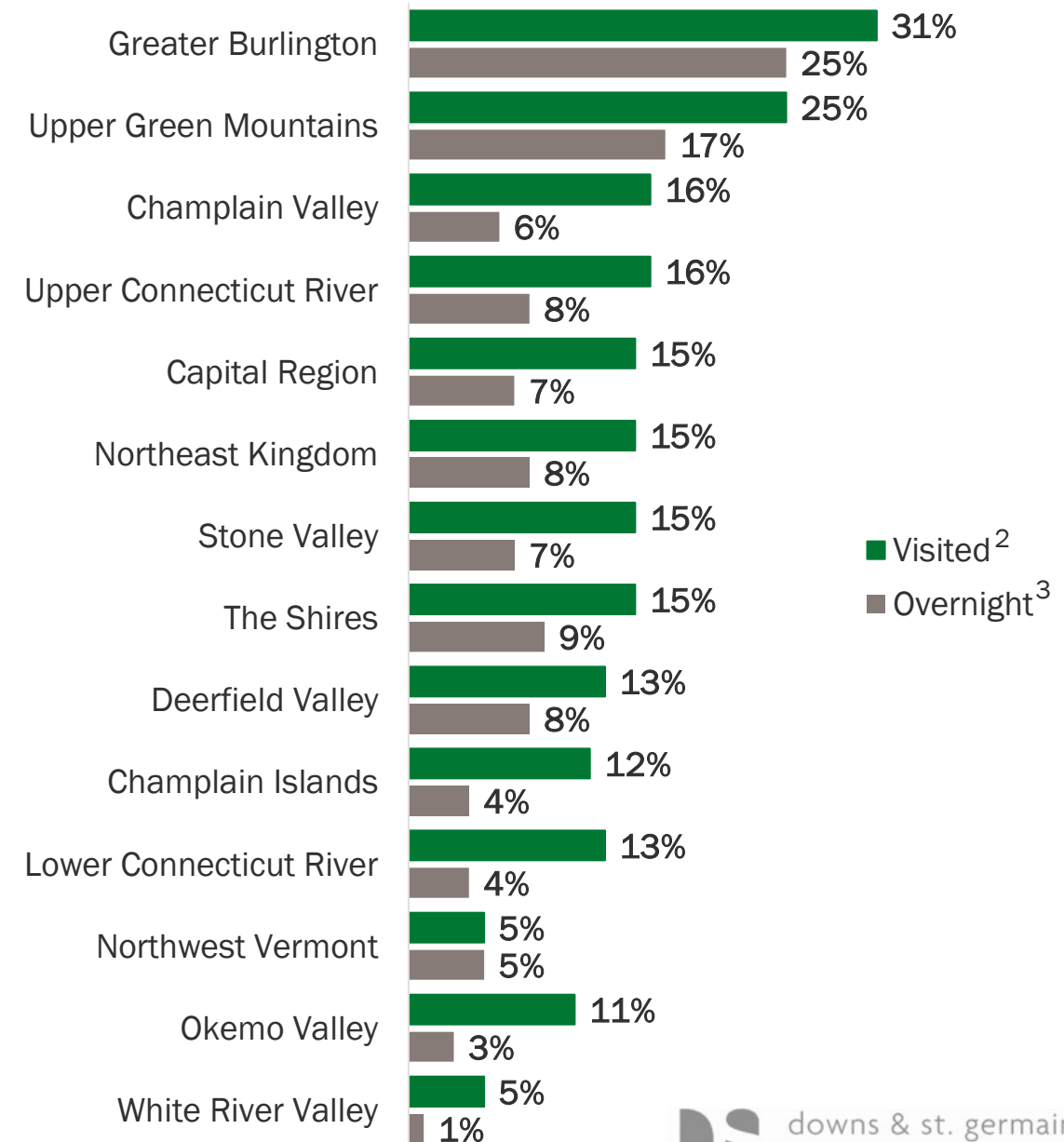
¹ How many nights are you staying in Vermont on this trip?

² Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

REGIONS STAYED IN AND VISITED¹

Vermont's fall visitors spend most of their time in the central and northwestern regions of the state.

» **Greater Burlington** and the **Upper Green Mountains** are the **most popular** destinations, both for overnight stays and day trips



¹ For a map of these regions, please see <https://vermontvacation.com/places-to-visit/vermont-regions>

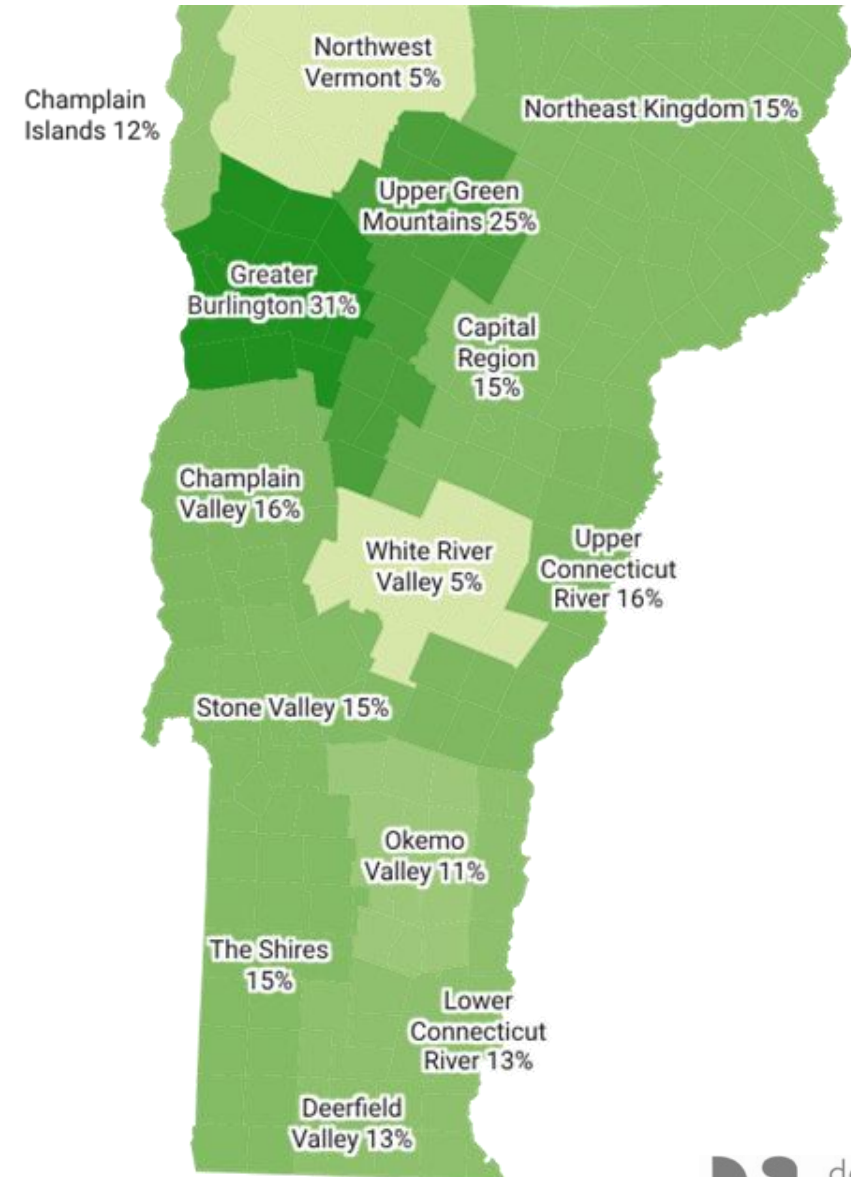
² Which regions of Vermont do you intend to visit on this trip?

³ In what city(s)/town(s) of Vermont are you staying overnight?

Multiple responses permitted.

REGIONS STAYED IN AND VISITED

- » This map depicts the regions of Vermont that visitors said they visited while on their trip. This includes visitors staying overnight in those regions and visitors who take day trips to regions other than where they are staying.
- » Although **Greater Burlington** and the **Upper Green Mountains** are the **most popular** destinations for fall visitors:
- » **16%** visited the **Champlain Valley** or the **Upper Connecticut River**
- » **15%** visited the **Capital Region**, **Northeast Kingdom**, **Stone Valley**, or **The Shires**

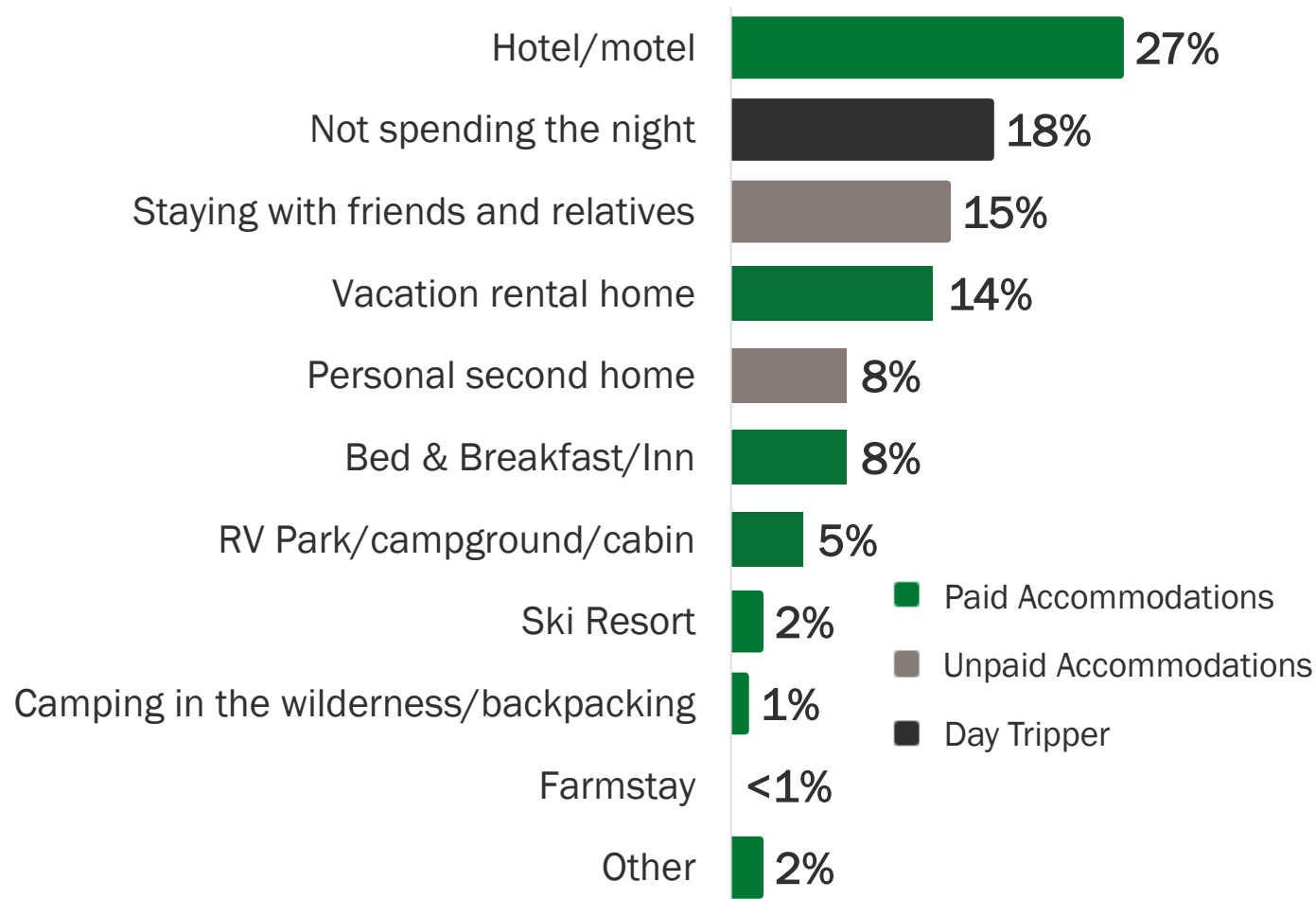


ACCOMMODATIONS¹

Nearly 3 in 5 of Vermont's fall visitors stayed overnight in paid accommodations.

- » Of those, **47%** stayed overnight in a hotel/motel
- » **25%** stayed in a vacation rental
- » **14%** stayed in a B&B/inn
- » **10%** stayed at a campground, RV park, or in the wilderness
- » **4%** stayed at a ski resort

Another over 2 in 5 fall visitors stayed with friends and family or came to Vermont only for the day.

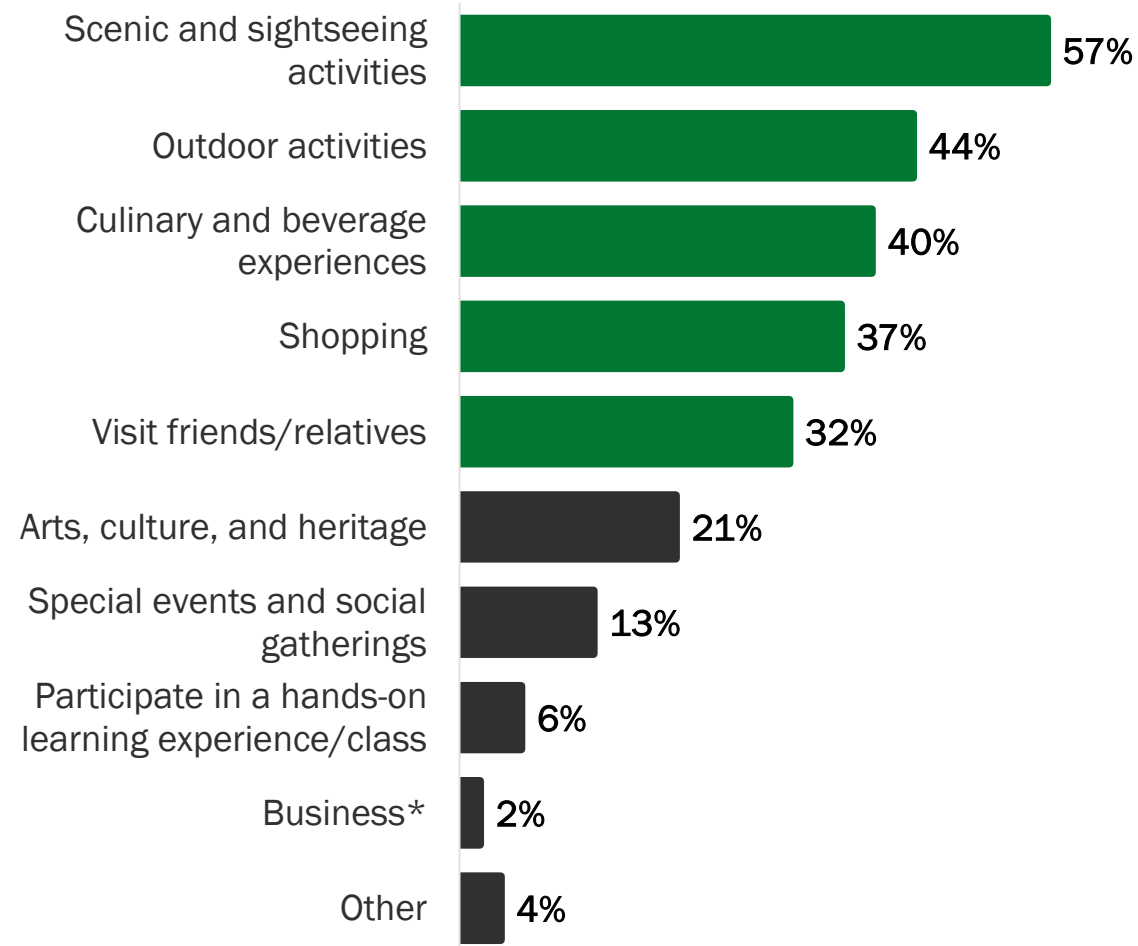


¹ In what type of accommodations are you staying on this trip?

VISITOR ACTIVITIES¹

Vermont's fall visitors enjoy a wide variety of activities, but one stands out: scenic/sightseeing activities.

- » **Nearly 3 in 5** fall visitors spend time doing **scenic and sightseeing activities**
- » **Around 2 in 5** fall visitors enjoy **outdoor activities** or **culinary and beverage experiences**
- » **Around 1 in 3** visitors spend time **shopping** or **visiting friends and relatives**
- » Compared to other fall visitors, **September** visitors are more likely to do outdoor activities; **October**, scenic and sightseeing activities; **November**, shopping and enjoying local food and drinks



¹ In which of the following activities did/will you participate during this trip? *Multiple responses permitted.*

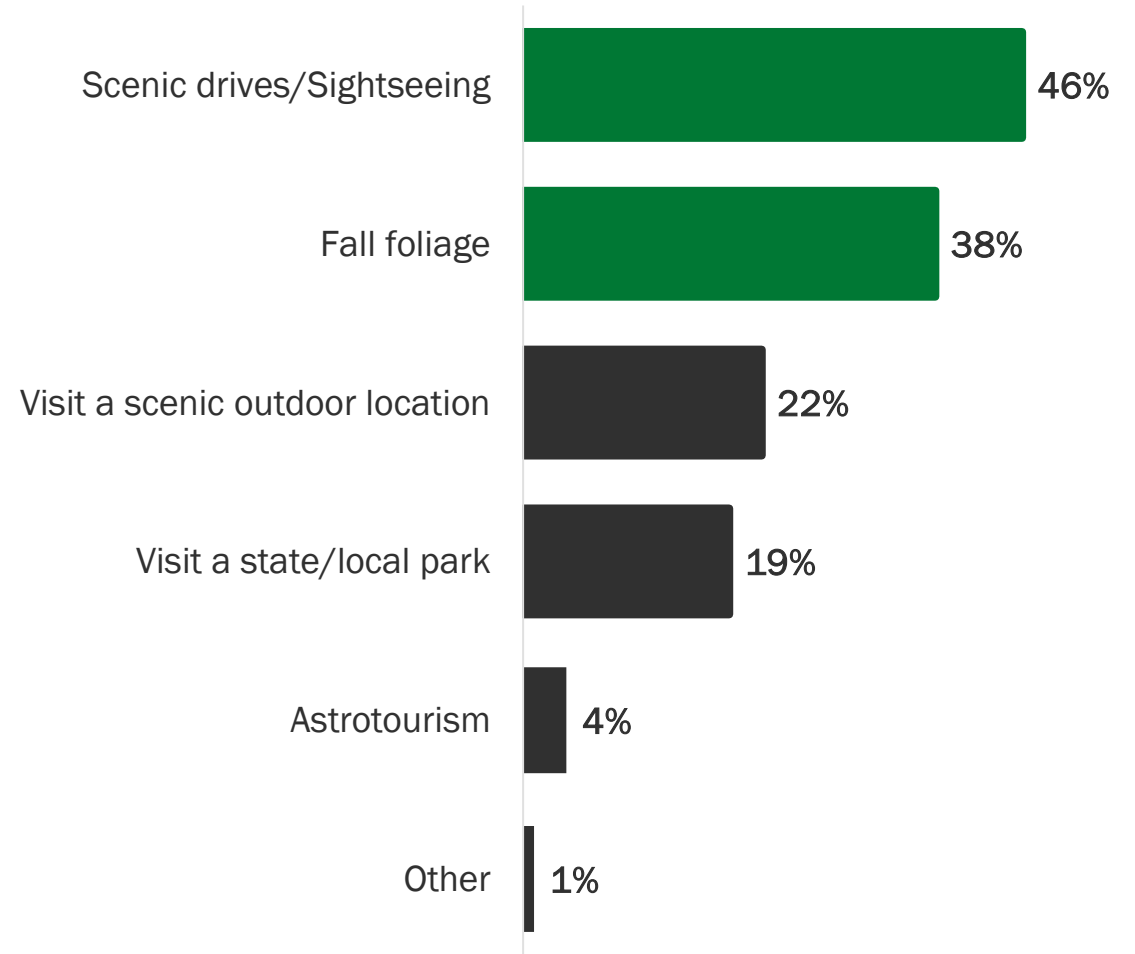
*Coded from "Other" write-in responses.

SCENIC & SIGHTSEEING ACTIVITIES¹

Nearly half of fall visitors enjoyed scenic and sightseeing activities while in Vermont.

» The most popular activity was going on a **scenic drive/sightseeing**, enjoyed by **nearly half** of visitors

» **Nearly 2 in 5** enjoyed the **fall foliage**

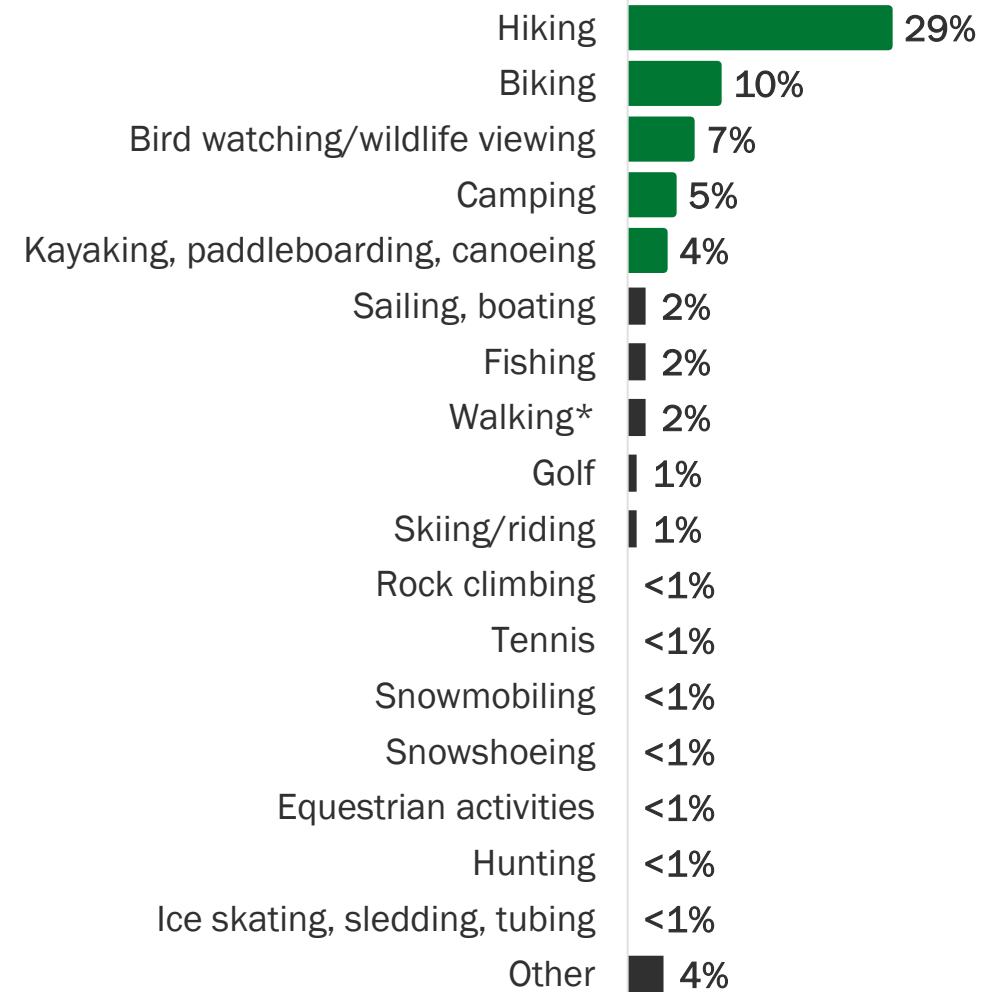


¹ Which of the following scenic and sightseeing activities did/will you participate in during this trip?
Multiple responses permitted. Percents out of all visitors.

OUTDOOR ACTIVITIES¹

Over 2 in 5 fall Vermont visitors engaged in outdoor activities while in the state.

- » **Hiking** was by far the most popular outdoor activity, enjoyed by **nearly 3 in 10** of the state's fall visitors
- » Of those who engaged in outdoor recreation activities, **nearly 4 in 5** did **more than one activity**
- » Compared to other fall visitors, **November** visitors were more likely to engage in **multiple outdoor activities**



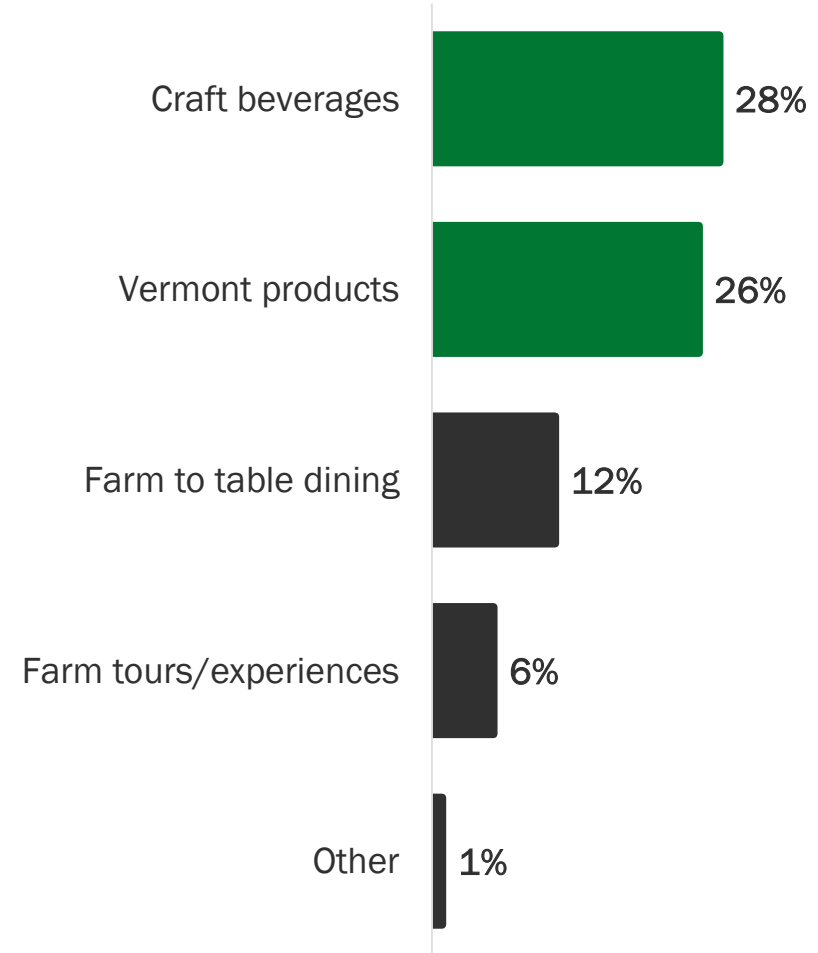
¹ Which of the following outdoor activities did/will you participate in during this trip?
Multiple responses permitted. Percents out of all visitors.

*Coded from "Other" write-in responses

FOOD & BEVERAGE ACTIVITIES¹

Wineries, cideries, breweries, distilleries, creameries, and cheese/maple product shops were popular destinations for another 2 in 5 fall Vermont visitors.

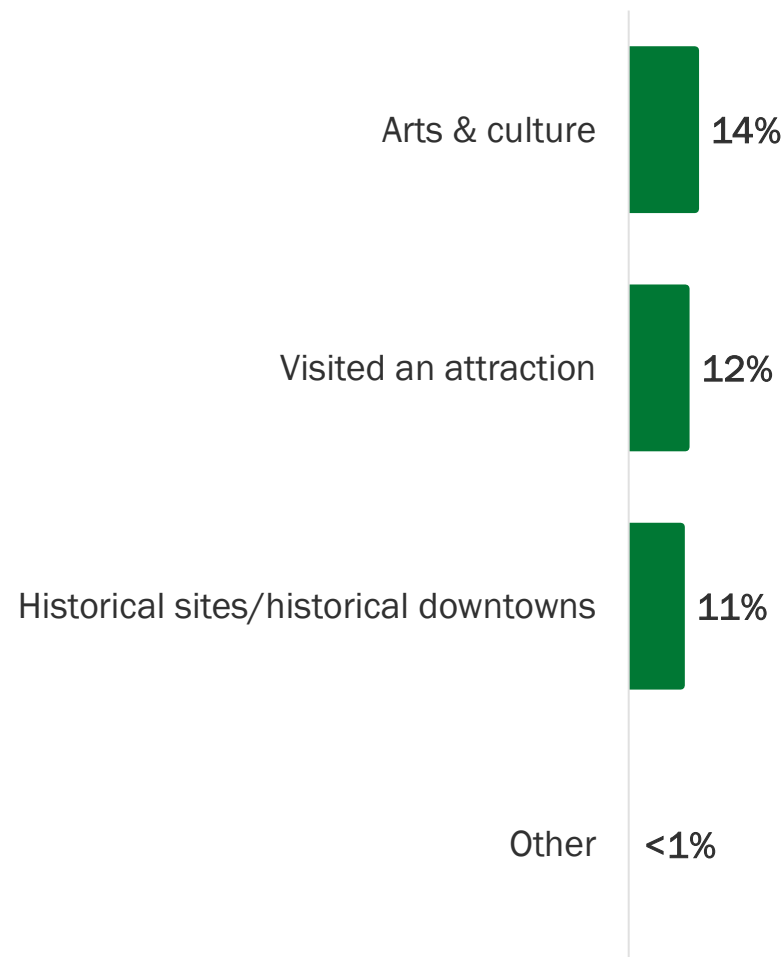
» Nearly 3 in 10 sample Vermont's **craft beverages** or other **Vermont products**



¹ Which of the following culinary and beverage experiences did/will you participate in during this trip?
Multiple responses permitted. Percents out of all visitors.

ARTS, CULTURE, & HERITAGE ACTIVITIES¹

Over 1 in 5 of Vermont's fall visitors engaged in arts, culture, and heritage activities while in the state.

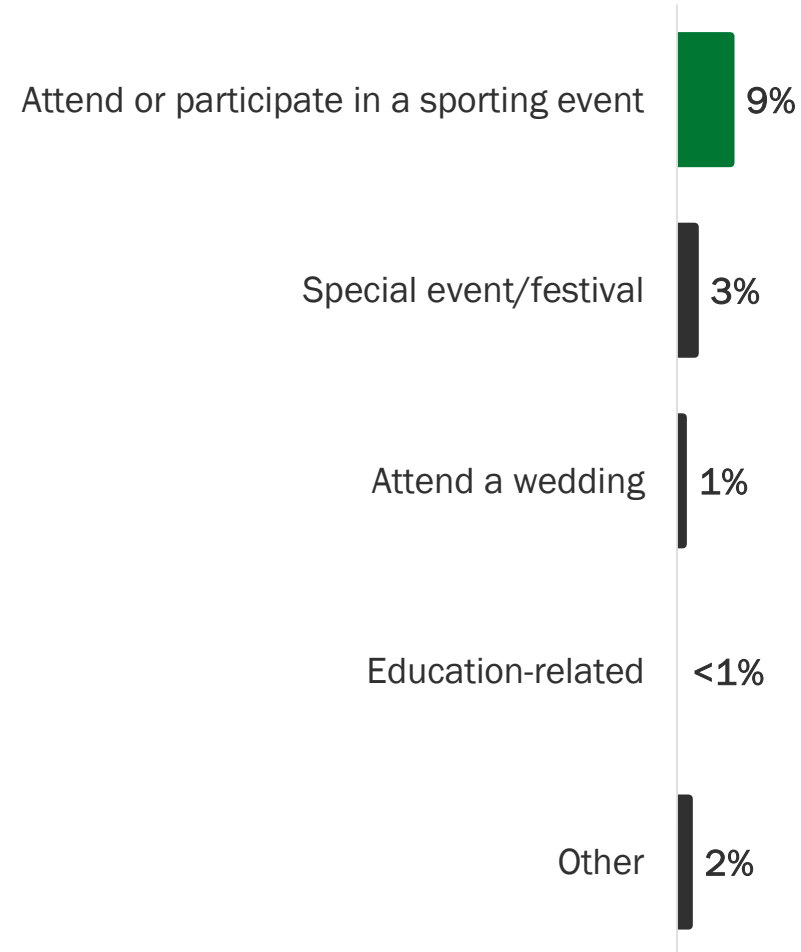


¹ Which of the following arts, culture, and heritage activities did/will you participate in during this trip?
Multiple responses permitted. Percents out of all visitors.

SPECIAL EVENTS¹

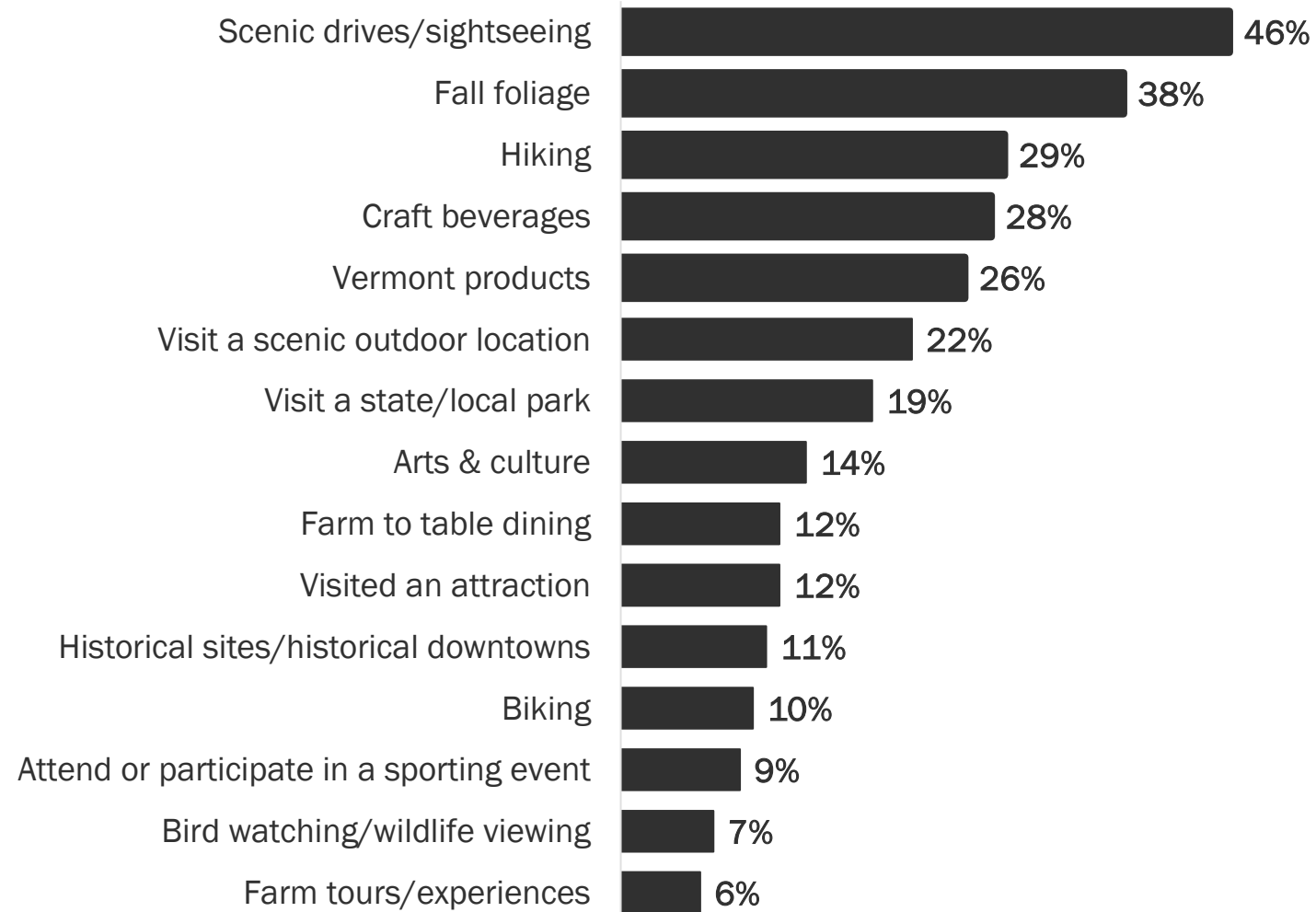
13% of fall visitors attended a special event or social gathering while in Vermont.

» Most attended or participated in a **sporting event**– **9%** of all visitors



¹ Which of the following special events or social gatherings did/will you participate in during this trip?
Multiple responses permitted. Percents out of all visitors.

TOP ACTIVITIES¹



¹ In which of the following activities did/will you participate during this trip?
Multiple responses permitted. Percents out of all visitors. Top 15 activities shown; all activities on next slide.

ALL ACTIVITIES¹

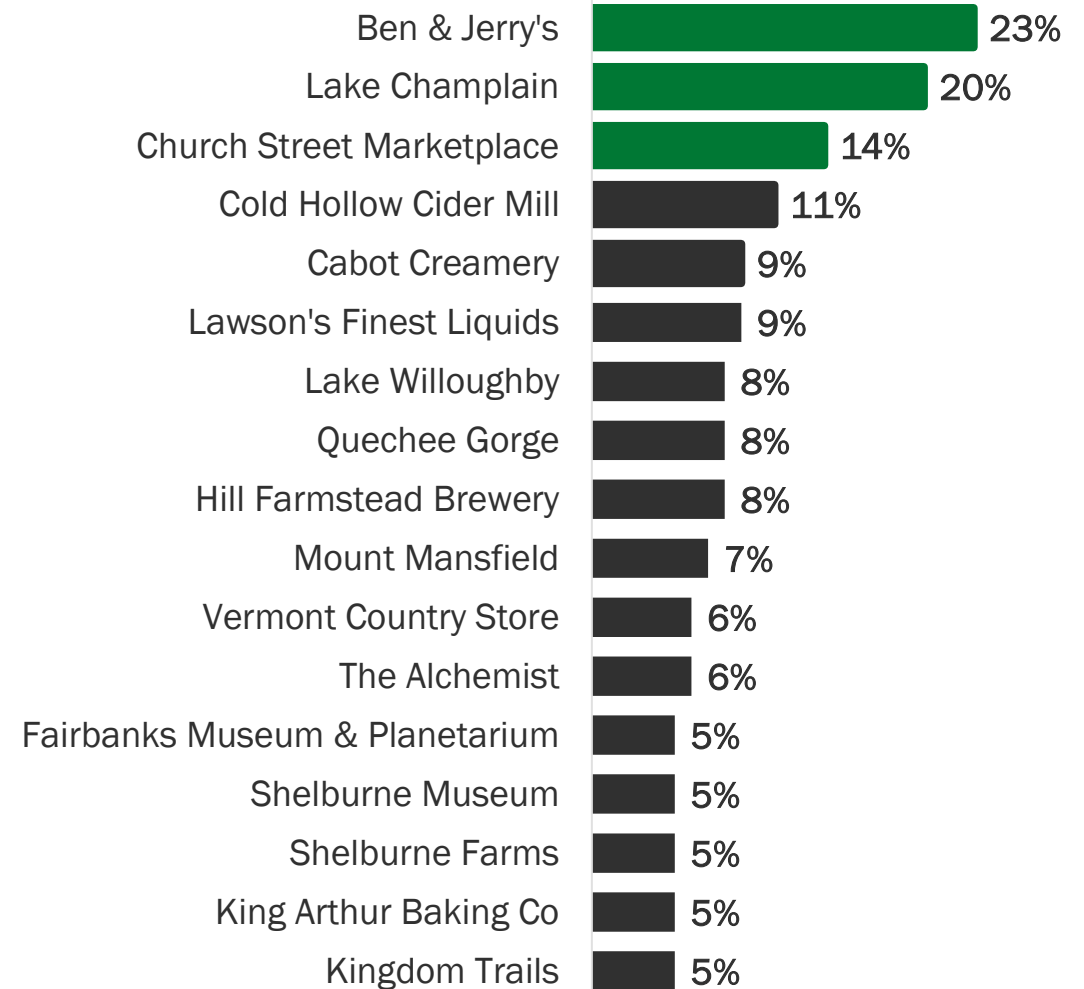
Activity	Percent	Activity	Percent
Scenic drives/sightseeing	46%	Astrotourism	4%
Fall foliage	38%	Kayaking, paddleboarding, canoeing	4%
Hiking	29%	Special event/festival	3%
Craft beverages	28%	Fishing	2%
Vermont products	26%	Sailing, boating	2%
Visit a scenic outdoor location	22%	Walking	2%
Visit a state/local park	19%	Attend a wedding	1%
Arts & culture	14%	Skiing/riding	1%
Farm to table dining	12%	Golf	1%
Visited an attraction	12%	Hunting	<1%
Historical sites/historical downtowns	11%	Rock climbing	<1%
Biking	10%	Snowmobiling	<1%
Attend or participate in a sporting event	9%	Tennis	<1%
Bird watching/wildlife viewing	7%	Snowshoeing	<1%
Farm tours/experiences	6%	Equestrian activities	<1%
Camping	5%		

¹ In which of the following activities did/will you participate during this trip?
Multiple responses permitted. Percents out of all visitors.

TOP PLACES VISITED¹

Vermont's fall visitors enjoy sampling local food and drinks, shopping in downtown areas, and seeking out scenic vistas.

- » **Ben & Jerry's** and **Lake Champlain** were the most popular destinations, visited by **around 1 in 5 visitors**
- » Another **nearly 1 in 7** visited the **Church Street Marketplace**



¹ Did you/do you plan to visit any of the following places?
Multiple responses permitted. Top 17 places shown; continued on next slide.

ALL PLACES VISITED¹

Attraction Visited	Percent	Attraction Visited	Percent
Ben & Jerry's	23%	Bennington Battle Monument	4%
Lake Champlain	20%	Vermont Teddy Bear Factory	4%
Church Street Marketplace	14%	Vermont State House, Montpelier	4%
Cold Hollow Cider Mill	11%	Hildene, The Lincoln Family Home	3%
Cabot Creamery	9%	Billings Farm	3%
Lawson's Finest Liquids	9%	Morse Farm Maple Sugarworks	3%
Lake Willoughby	8%	Marsh-Billings-Rockefeller National Historical Park	2%
Quechee Gorge	8%	Echo, Leahy Center for Lake Champlain	2%
Hill Farmstead Brewery	8%	Colchester Causeway	2%
Mount Mansfield	7%	Mount Equinox Skyline Drive	2%
Vermont Country Store	6%	Lamoille Valley Rail Trail	2%
The Alchemist	6%	Vermont Institute of Natural science	1%
Fairbanks Museum & Planetarium	5%	Southern Vermont Arts Center	1%
Shelburne Museum	5%	Barr Hill/Caledonia Spirits	1%
Shelburne Farms	5%	Montshire Museum of Science	1%
King Arthur Baking Co	5%	Other	8%
Kingdom Trails	5%	None	19%

¹ Did you/do you plan to visit any of the following places?

² Other places visited included the Trapp Family Lodge, Sugarbush Farm, Smugglers Notch, the Great Vermont Corn Maze, and the Bennington Museum

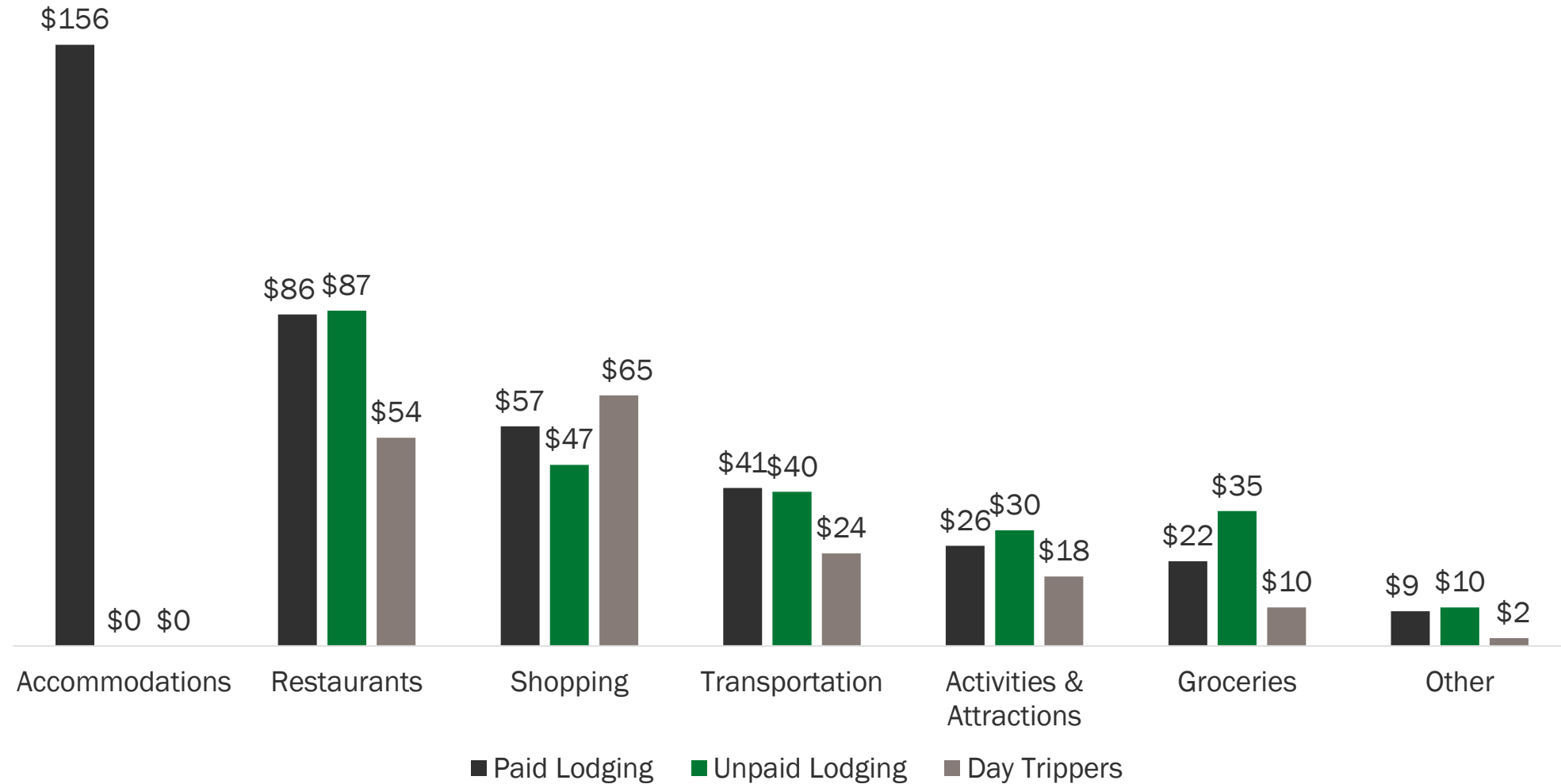
DAILY TRAVEL PARTY SPENDING¹

Average spending for each travel party, **each day of their trip:**

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$156	\$0	\$0
Restaurants	\$86	\$87	\$54
Shopping	\$57	\$47	\$65
Transportation	\$41	\$40	\$24
Activities & attractions	\$26	\$30	\$18
Groceries	\$22	\$35	\$10
Other	\$9	\$10	\$2
Daily Spending	\$397	\$249	\$173

¹ How much is your immediate travel party spending on each of the following per day during your stay in Vermont?

DAILY TRAVEL PARTY SPENDING

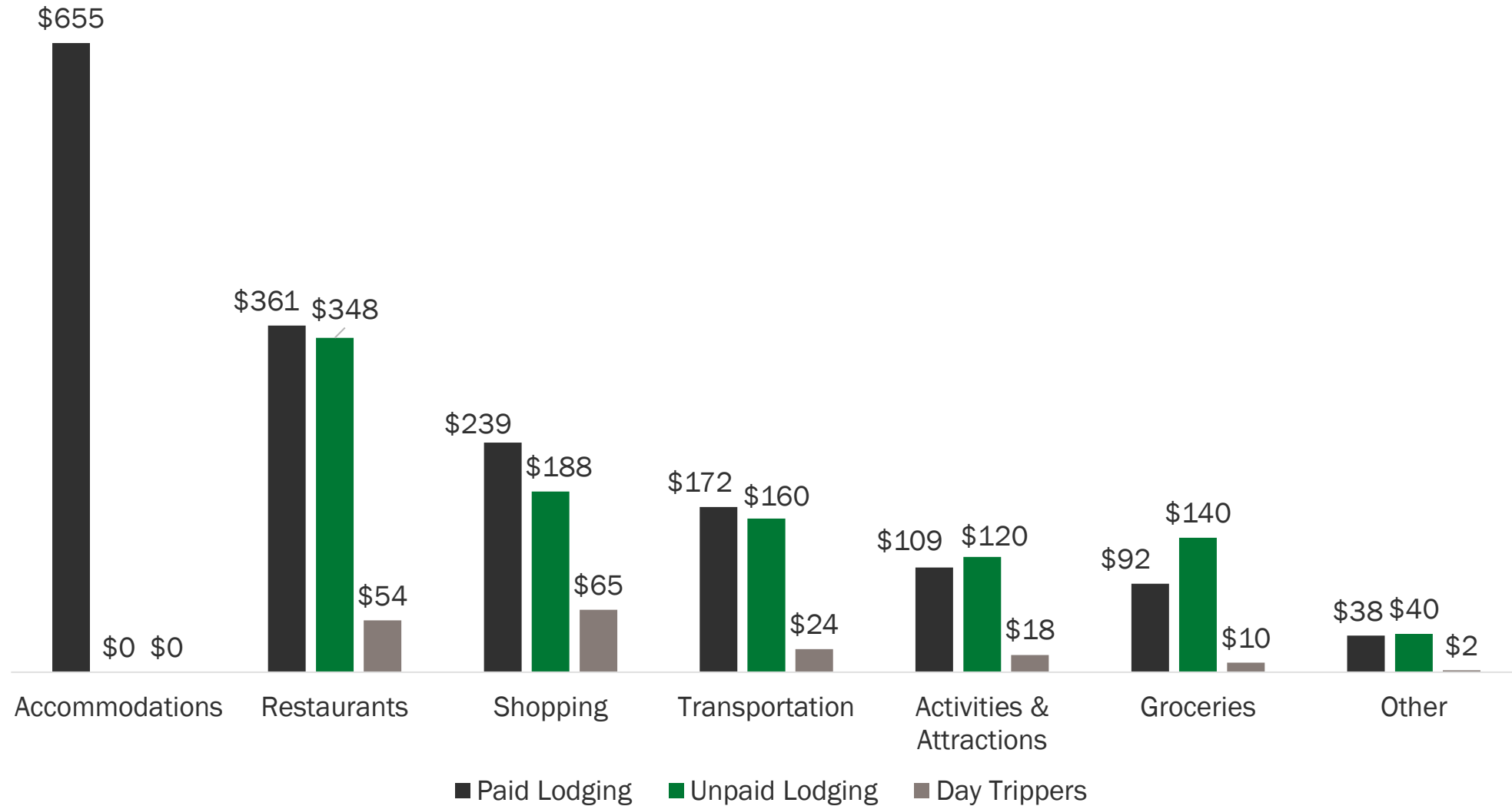


TOTAL TRAVEL PARTY SPENDING

Average spending for each travel party, **across their entire trip:**

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$655	\$0	\$0
Restaurants	\$361	\$348	\$54
Shopping	\$239	\$188	\$65
Transportation	\$172	\$160	\$24
Activities & attractions	\$109	\$120	\$18
Groceries	\$92	\$140	\$10
Other	\$38	\$40	\$2
Trip Spending	\$1,666	\$996	\$173

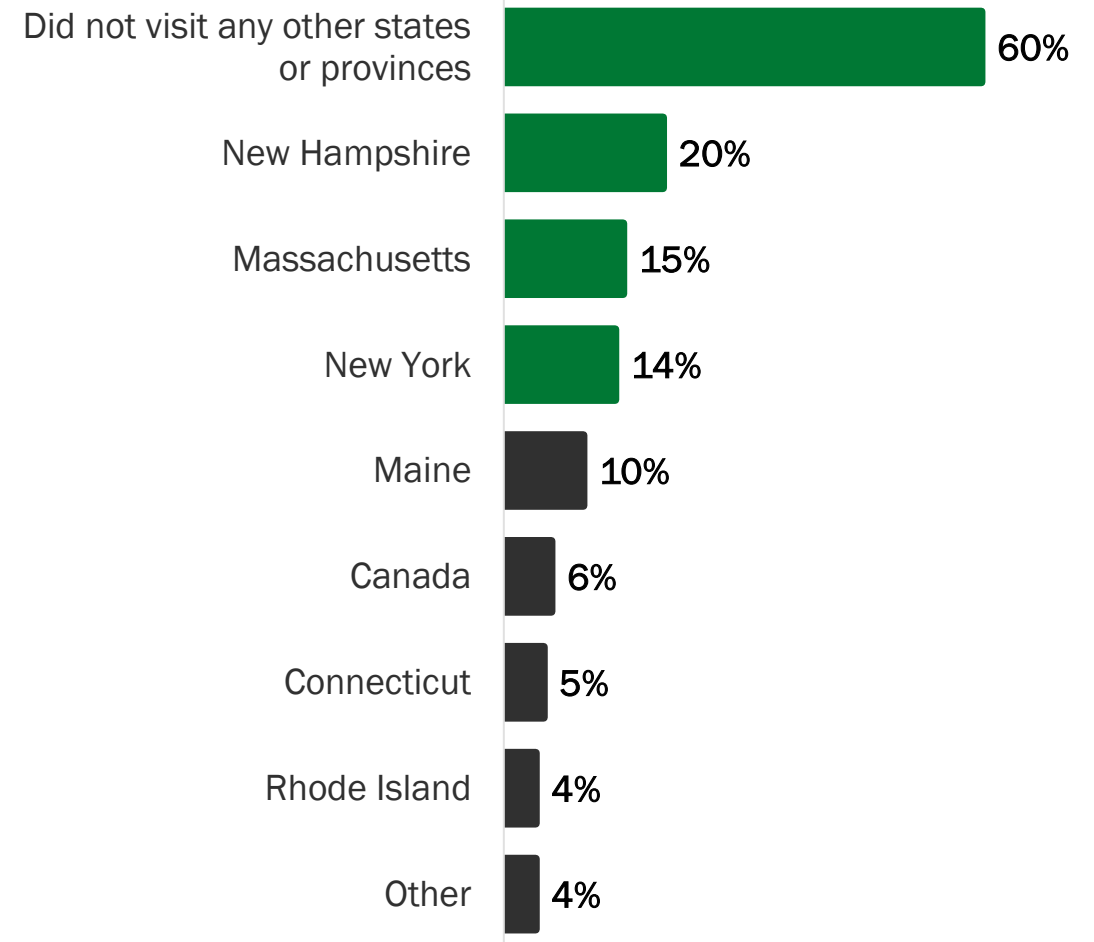
TOTAL TRAVEL PARTY SPENDING (CONT'D)



OTHER STATES & CANADA VISITED¹

While a majority of Vermont's fall visitors seek out the state as their sole travel destination, many visit other states or Canada on the same trip.

- » **3 in 5** visitors **did not visit any other** U.S. state or Canadian province during their trip
- » Those who did visit states other than Vermont primarily went to other states in **New England** or **New York**



¹ What other states or Canada did you/do you plan to visit on this same trip? *Multiple responses permitted.*

TRIP EXPERIENCE SUMMARY

THE VISITOR EXPERIENCE

WHERE TO GO & WHAT TO DO?

Vermont's fall visitor is well-traveled. They are willing to spend time driving around the state to catch the best fall color, though they most often spend time in the Greater Burlington and Upper Green Mountains areas.

In early fall, they value time spent hiking and going on scenic drives to see the fall foliage; in late fall, skiing, shopping, enjoying Vermont's food and drinks, and spending time with friends and family.



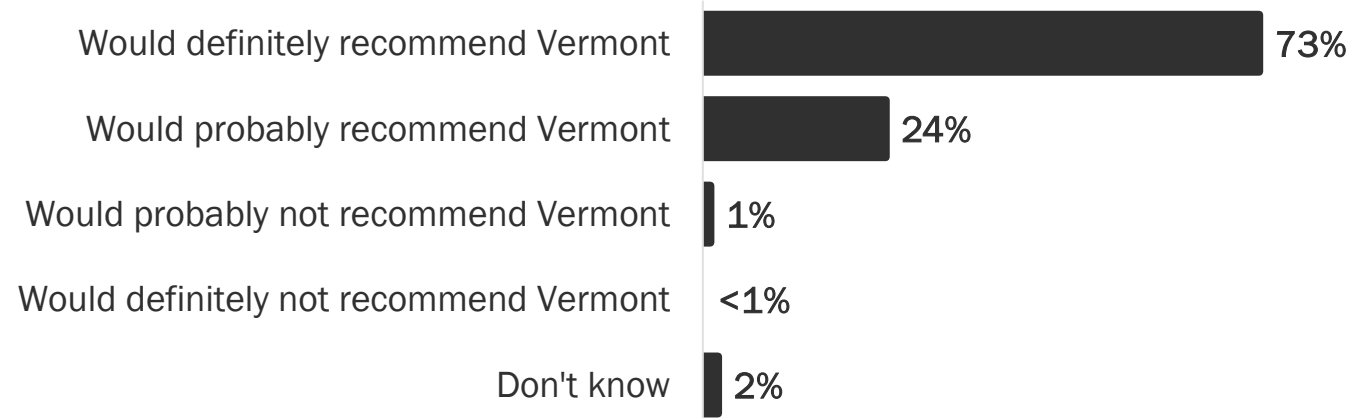
VISITOR JOURNEY : POST-TRIP EVALUATION



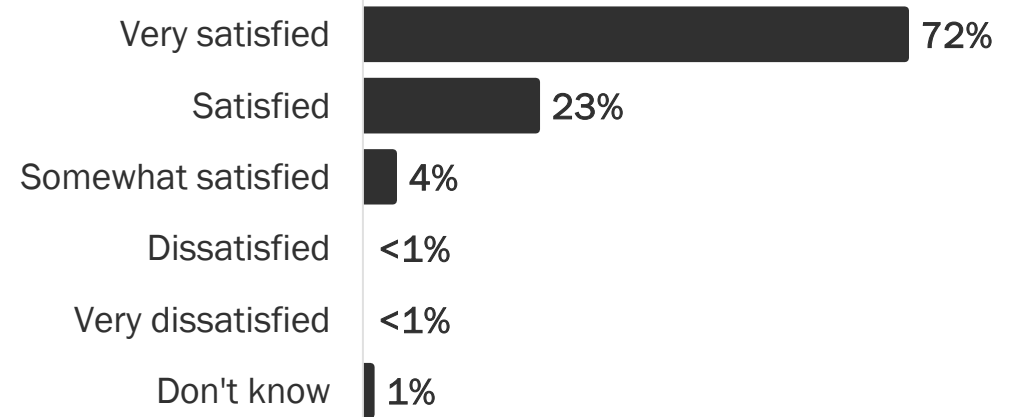
RECOMMENDATION & SATISFACTION

- » **97%** of fall visitors **would recommend** that their friends and family choose Vermont as a vacation destination
- » **99%** of fall visitors are **satisfied** with their visit to Vermont
- » **October** visitors were most likely to be very satisfied with their visit compared to those visiting in other months

Likelihood of Recommending Vermont¹



Satisfaction with Visit²



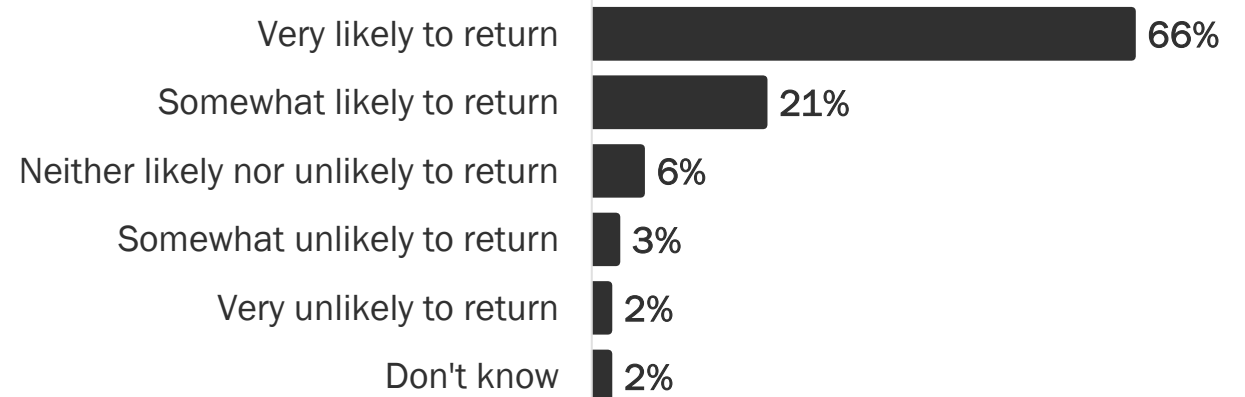
¹ Would you recommend Vermont to friends/family over other vacation areas?

² How satisfied are you with your visit to Vermont?

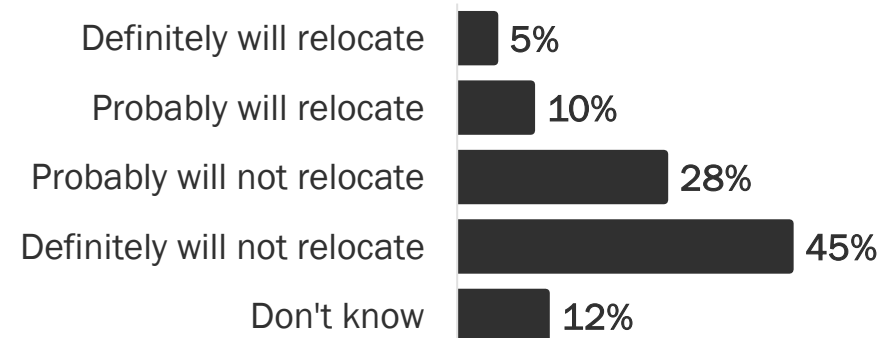
RETURNING & RELOCATING

- » **Nearly 9 in 10** visitors will **return** to Vermont for a future visit or vacation (**2 in 3** are very likely to return)
- » **5%** of all visitors are unlikely to return to Vermont for the following reasons:
 1. Prefer a variety of destinations
 2. Too long a drive/too difficult to get there
 3. Once is enough to see and do everything
 4. Traffic/crowding
- » **Nearly 1 in 6** visitors **may relocate** to Vermont (**5%** will definitely relocate)
- » **November** visitors are **most** likely to return to Vermont for another visit

Likelihood of Returning to Vermont¹



Likelihood of Relocating to Vermont²



¹ How likely are you to return to Vermont for a vacation?

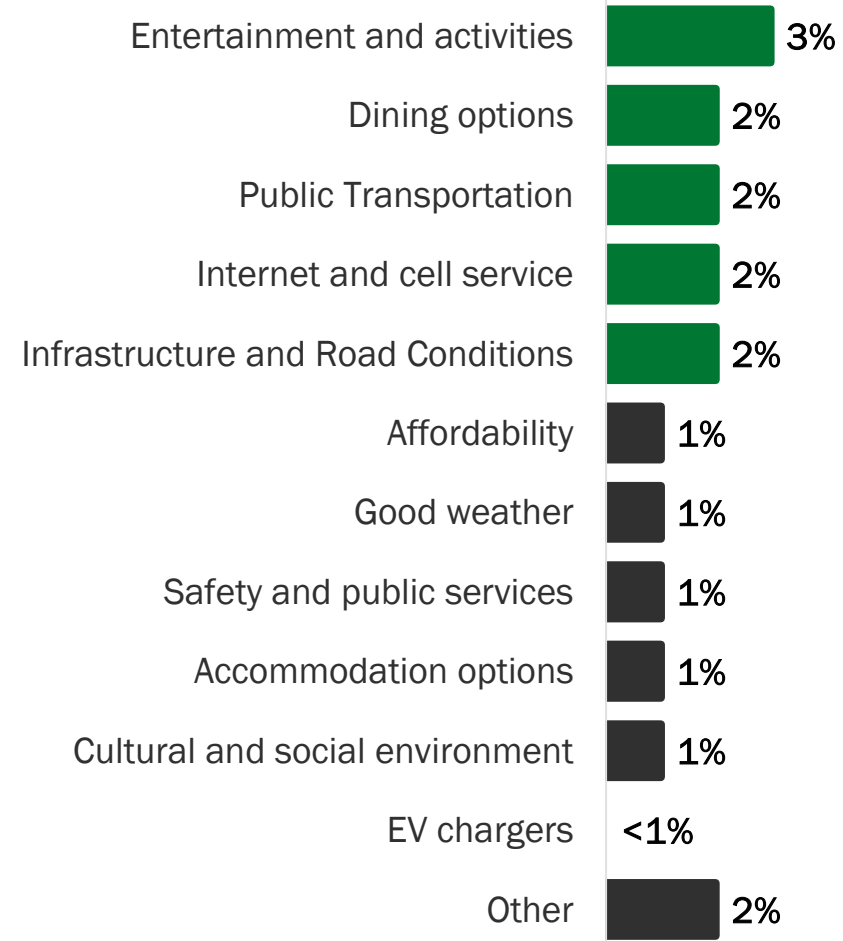
² How likely are you to relocate to Vermont as a resident?

MAKING VERMONT BETTER

Only 14% of fall visitors felt something was missing from their Vermont travel experience.¹

- » 3% of all visitors wanted more and better **entertainment and activities** and more extended business hours
- » 2% mentioned better **dining options, public transportation, cell service, and infrastructure and road conditions**

Missing from Vermont Travel Experience²



¹ Was anything missing that would make Vermont a better vacation destination?

² What do you think was missing in your travel experience?

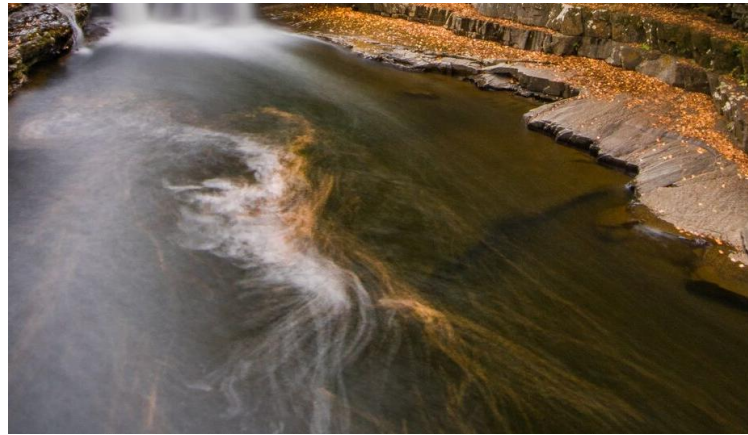
Coded open-ended responses. Multiple responses permitted. Percents out of all visitors.

PERCEPTIONS OF VERMONT¹

“The most ‘Norman Rockwell meets modern times’ place you will ever visit.”



“Vermont is unrushed – a great escape from the hustle and bustle. A place to rest.”

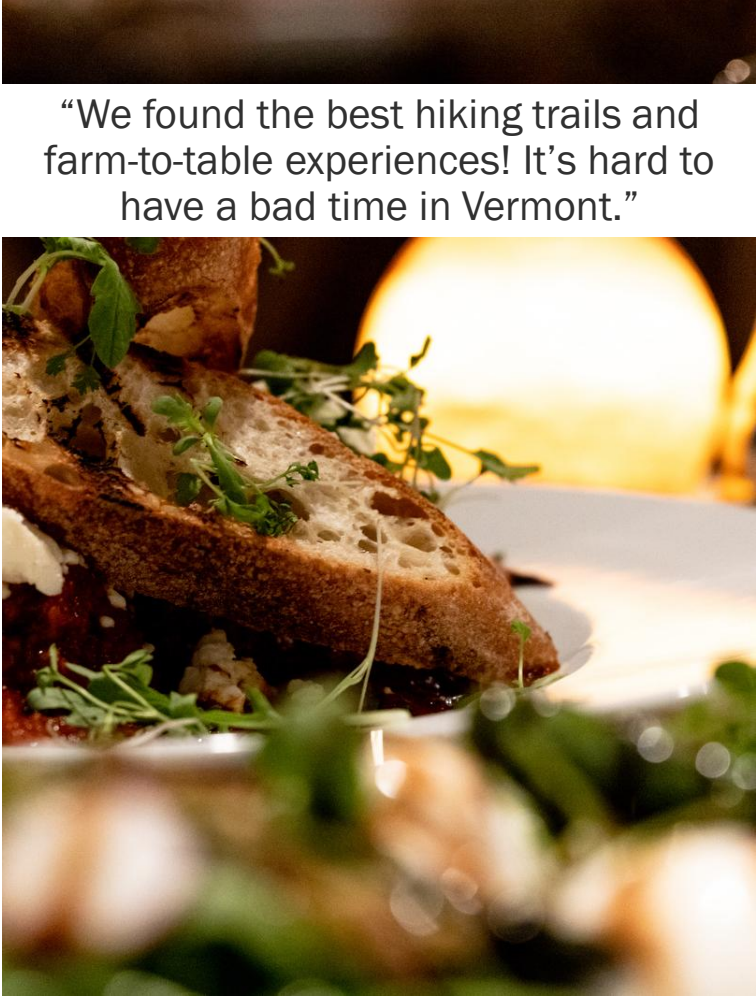


“It’s evident that Vermont takes pride in their state and works hard to keep it unique.”



¹ If you were talking to a friend who’d never been here, how would you describe Vermont as a place to visit?

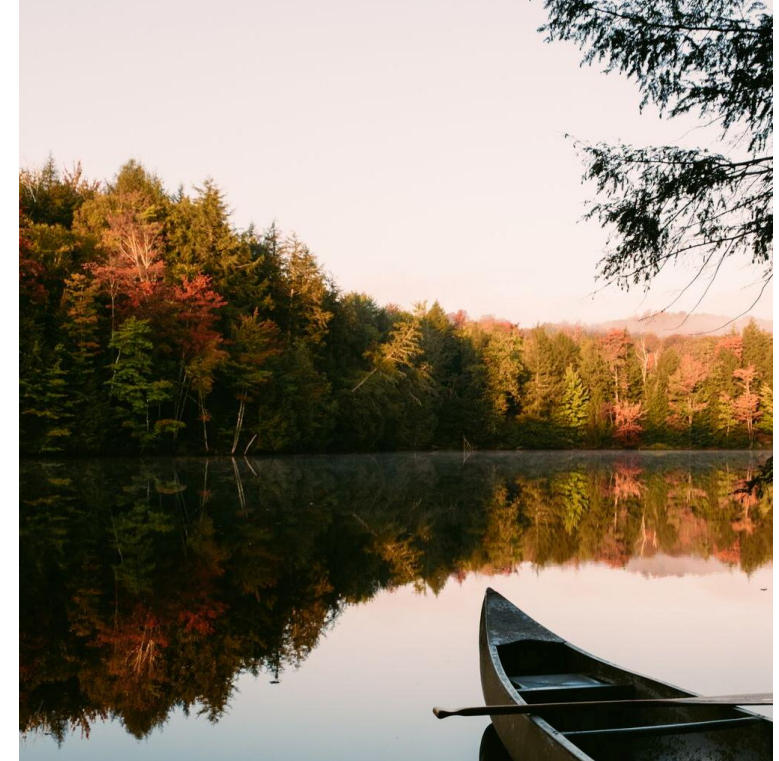
PERCEPTIONS OF VERMONT (CONT'D)¹



“We found the best hiking trails and farm-to-table experiences! It’s hard to have a bad time in Vermont.”



“Vermont is the best place on earth to live. You can make friends walking down Main Street. People make eye contact.”



“I’ve traveled a lot, including abroad, and I’ve felt the most peace in Vermont.”

¹ If you were talking to a friend who’d never been here, how would you describe Vermont as a place to visit?

POST-TRIP EVALUATION SUMMARY

REFLECTIONS

HOW WAS YOUR TRIP?

Visitors are highly satisfied with their fall trips to Vermont, particularly September and October visitors. Many October visitors are in the state for the first time to see the fall color and check off a bucket list item. But many November visitors have friends or family living in the state and have been there many times.

While they acknowledge the state's rural nature and some of the downsides that come along with that, fall visitors also love Vermont for what it is: a quieter place with a slower pace. They describe it as a place of ease; unspoiled; like taking a step back in time.

One visitor described the state as “a good place to meander,” and that is what fall visitors do – explore; chase the fall color; and embrace the changing of the season.



SEASONAL COMPARISONS

INTRODUCTION: SEASONAL COMPARISONS

SEASONAL COMPARISONS

Visitor patterns within a season vary in meaningful ways, reflecting differences by month, demographics, motivation for travel, etc. However, interpreting any one season in isolation can miss the bigger picture. In Vermont, where travel demand and visitor behavior shift markedly across the year, comparing seasons is essential to understanding how each season's visitors are unique.

The seasonal comparisons that follow provide that context, helping to align advertising and messaging with the distinct audiences, motivations, and behaviors associated with the fall season.



SEASONAL COMPARISONS FINDINGS

Compared to other seasons of the year, fall visitors to Vermont:

Pre-Visit

- » Spend longer planning their trips
- » Are most likely to use both online and offline sources to plan their trips
- » Leisure visitors most often come to Vermont for the fall foliage

Traveler Profile

- » Travel from the widest variety of areas and have the highest share of visitors traveling from the West and Midwest
- » Relatedly, are most likely to fly to Vermont instead of drive
- » Are most likely to travel as a couple without children

Trip Experience

- » Can be found throughout the state, but tend to spend the night in the northwest-central part of the state
- » Paid visitors most often spend the night in bed & breakfasts
- » Have the highest share of visitors doing scenic and sightseeing activities, particularly leaf peeping
- » Spend more time at Lake Champlain
- » Are most likely to visit multiple local attractions
- » Are most likely to visit other states during their trip

Post-Trip Evaluation

- » Are least likely to report planning to return to Vermont for a vacation or planning to relocate as a resident



REGIONAL COMPARISONS

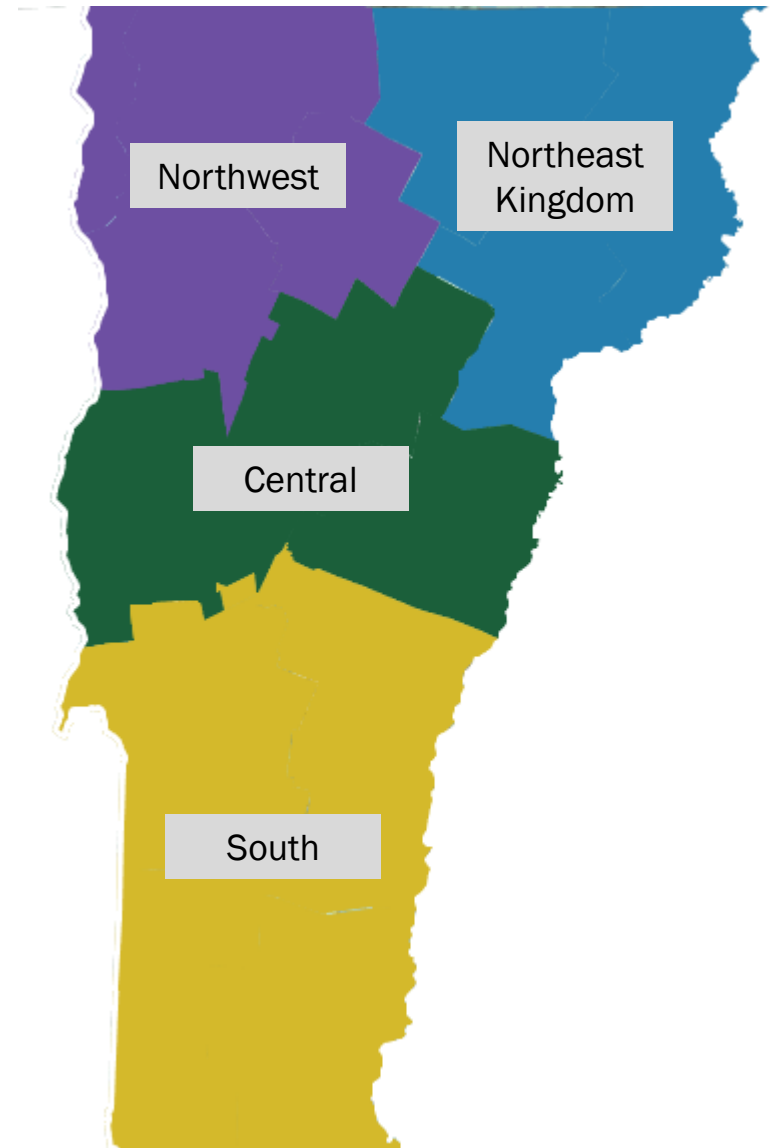
INTRODUCTION: REGIONAL COMPARISONS

REGIONAL COMPARISONS: FALL VISITORS

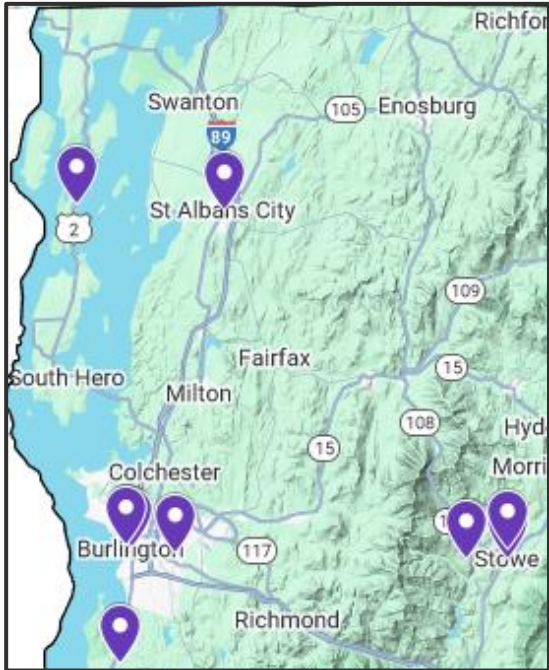
This section looks at how fall visitor traits and behavior differ across Vermont's four broad geographic regions. Understanding these regional patterns helps identify what drives demand in each part of the state and where opportunities exist to better tailor marketing, experiences, and investments by region, specifically among fall visitors.

Each region is made up of three to four counties:

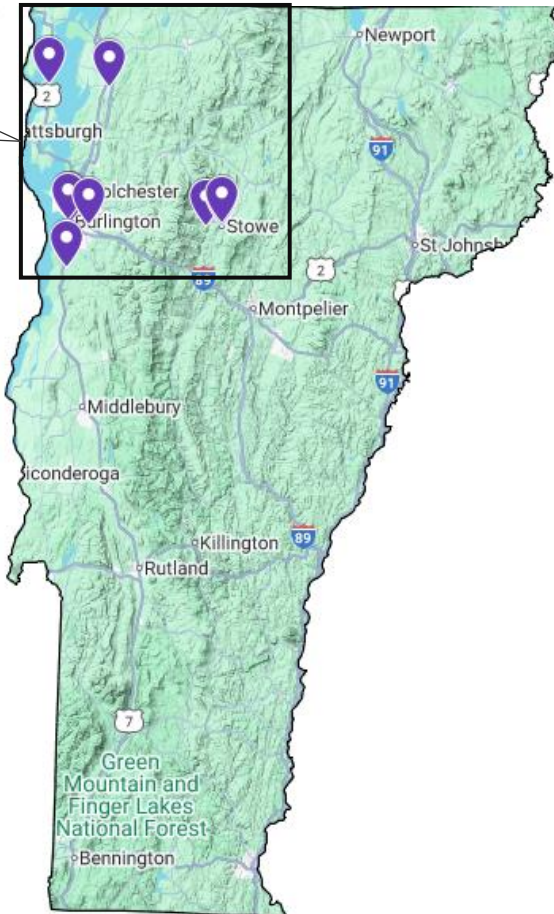
- Northwest: Grand Isle, Franklin, Chittenden, and Lamoille Counties
- Northeast Kingdom: Caledonia, Essex, and Orleans Counties
- Central: Addison, Washington, and Orange Counties
- South: Bennington, Rutland, Windham, and Windsor Counties



NORTHWEST SURVEY LOCATION MAP



Insights on visitors to the Northwest region of Vermont are based on surveys collected online and at the following attractions:



Northwest Survey Sites

- Burlington Airport
- Hero's Welcome
- Hotel Vermont
- Church Street Market
- Downtown St. Albans
- Vermont Teddy Bear Factory
- Trapp Family Lodge
- Downtown Stowe
- Burlington Waterfront

Northwest Events

- Pumpkin Chuckin' Festival

NORTHWEST*

Compared to other regions of the state, fall visitors to northwest Vermont:

Pre-Visit

- » Are less likely to plan and book their trips at the last minute
- » Spend time on hotel, airline, and rental car websites while planning their trip
- » Are less often leisure visitors and more often traveling for business
- » Leisure visitors are in the state for the fall foliage or scenic drives

Traveler Profile

- » Are more likely to be traveling from the Midwest or the South and less likely from New England
- » Tend to be solo travelers over age 65 in the state for the first time

Trip Experience

- » Take the longest trips and are most likely to stay in hotels
- » Are more likely to spend time at scenic outdoor locations, shopping, or working
- » Have the highest daily spending

Post-Trip Evaluation

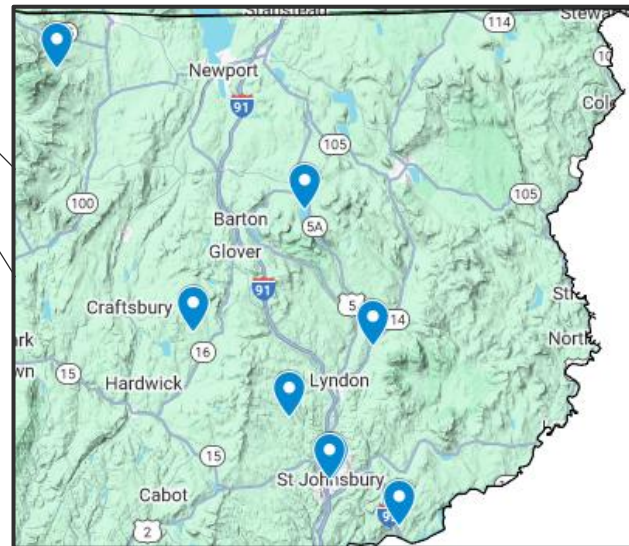
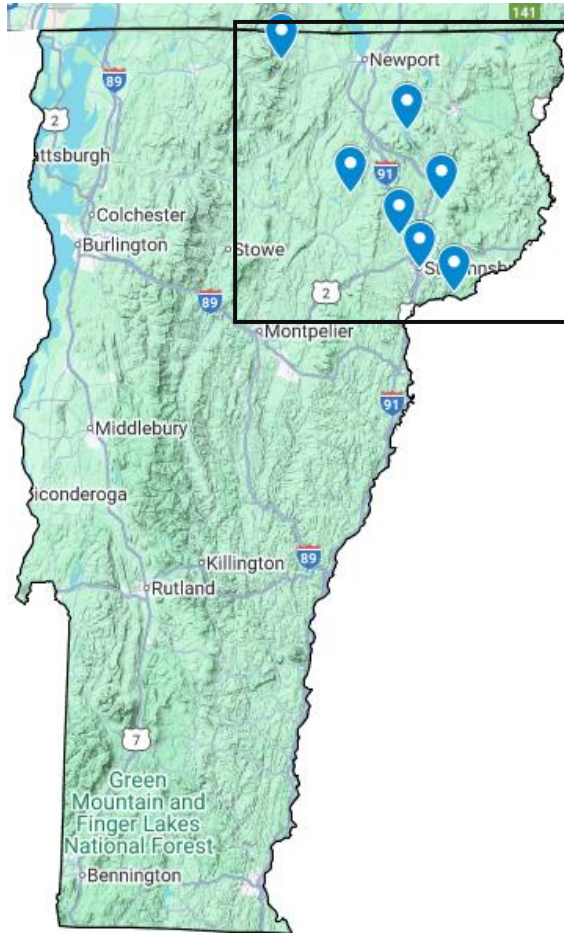
- » Report average trip satisfaction and likelihood of returning to Vermont for a vacation

*Grand Isle, Franklin, Chittenden, and Lamoille Counties make up northwest Vermont.

Major cities and towns include Burlington, Stowe, and St. Albans.

NORTHEAST KINGDOM SURVEY LOCATION MAP

Insights on visitors to the Northeast Kingdom region of Vermont are based on surveys collected online and at the following attractions:



Northeast Kingdom Survey Sites

- Fairbanks Museum & Planetarium
- Great Vermont Corn Maze
- Hill Farmstead Brewery
- Jay Peak Resort
- Kingdom Trails
- Lake Willoughby
- Downtown St. Johnsbury
- Waterford Welcome Center

Northeast Kingdom Events

- Fall for St. Johnsbury
- Bean & Brew Festival

NORTHEAST KINGDOM*

Compared to other regions of the state, fall visitors to Vermont's Northeast Kingdom:

Pre-Visit

- » Rely more on social media, online travel agencies, and word of mouth when planning their trips
- » Have a higher share of leisure visitors and fewer visiting friends and family
- » Are more often in Vermont for outdoor rec, craft beverages, and/or simply to relax
- » See more advertising in travel blogs, online articles, and magazines and are more influenced by ads

Traveler Profile

- » More often travel from Canada and New England; more often with friends, less often as a couple
- » Tend to be younger, male, and lower income

Trip Experience

- » Are less likely to be first-time visitors, spend less time in the state, and have the lowest daily spending on average
- » More often spend time enjoying Vermont's outdoor activities, particularly biking

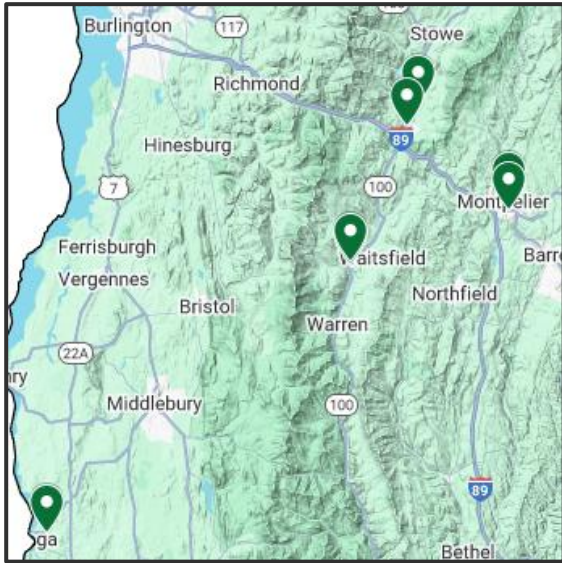
Post-Trip Evaluation

- » Are less certain if they would recommend Vermont or return for a vacation

*Caledonia, Essex, and Orleans Counties make up Vermont's Northeast Kingdom.
Major towns include St. Johnsbury, Newport, and East Burke.

CENTRAL SURVEY LOCATION MAP

Insights on visitors to the Central region of Vermont are based on surveys collected online and at the following attractions:



Central Survey Sites

- Ben & Jerry's
- Cold Hollow Cider Mill
- Barr Hill Distillery
- Waitsfield Shopping Center
- Champlain Orchards
- Downtown Montpelier

Central Events

- Lawson's Oktoberfest

Compared to other regions of the state, fall visitors to central Vermont:

Pre-Visit

- » Are more likely to spend time on vacation rental websites while planning their trips
- » Are similar to the average visitor in their reasons for travel: leisure and visiting friends or family
- » Leisure visitors are more likely to be in Vermont for the food, fall foliage, and attractions

Traveler Profile

- » Are more likely to be first-time visitors staying in the state for 5 nights or more
- » First-time visitors are drawn to the state by its beauty or the desire to experience somewhere new

Trip Experience

- » Spend more time enjoy local food, drinks, sightseeing, shopping, and doing arts and culture activities
- » Have average daily spending

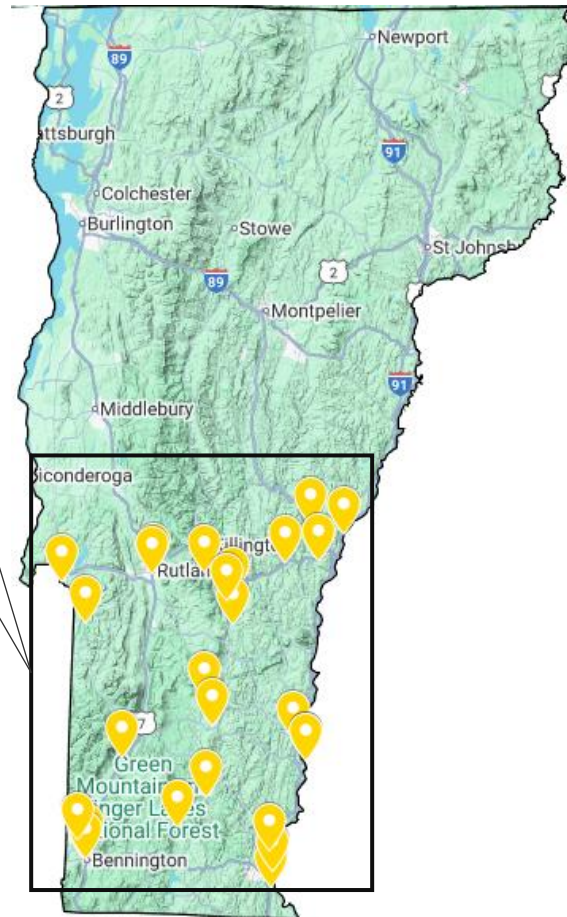
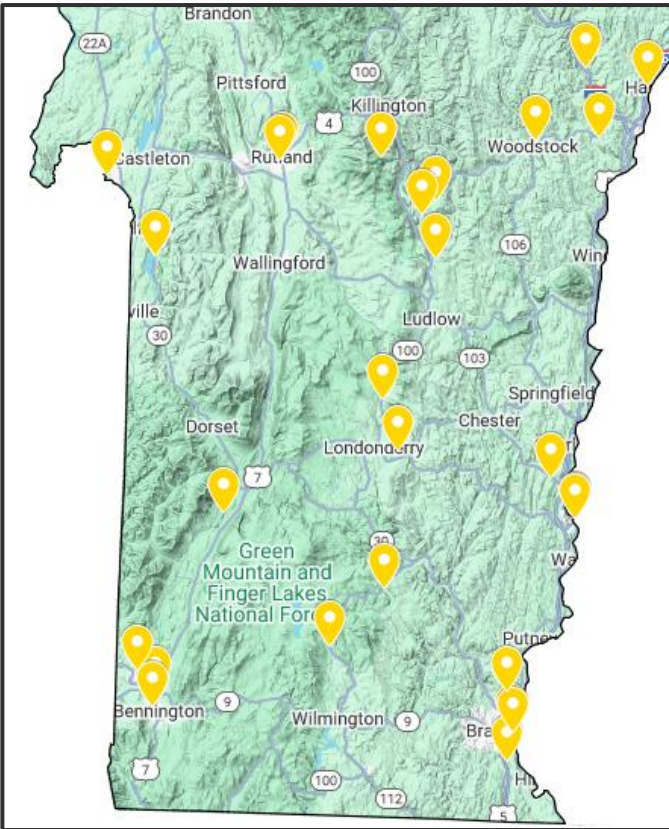
Post-Trip Evaluation

- » Report slightly higher trip satisfaction and likelihood of recommending Vermont to friends or family

*Addison, Washington, and Orange Counties make up central Vermont.
Major cities and towns include Middlebury, Barre, and Randolph.

SOUTH SURVEY LOCATION MAP

Insights on visitors to the South region of Vermont are based on surveys collected online and at the following attractions:



South Survey Sites

- Bennington Museum
- Bennington Welcome Center
- Billings Farm
- Coolidge Historic Site
- Camp Plymouth State Park
- Fair Haven Welcome Center
- Guilford Welcome Center
- Hildene
- King Arthur Baking Co.
- Lake St. Catherine State Park
- Lowell Lake State Park
- Vermont Country Store Bellows Falls
- Vermont Country Store Weston
- Sharon Welcome Center
- Quechee Gorge
- Downtown Bellows Falls
- Downtown Brattleboro

South Events

- Wine & Harvest Festival
- Killington Brewfest
- Rutland Foliage Festival
- Heirloom Apple Day
- Rockingham Flannel Festival
- Gilfeather Turnip Festival

Compared to other regions of the state, fall visitors to south Vermont:

Pre-Visit

- » Are more likely to start planning their trips, and to book accommodations, a week or less before the trip
- » Consult fewer sources while planning their trips
- » Are less likely to be leisure visitors and more likely to be in the state to see friends or family
- » Leisure visitors are more often there to shop
- » Choose Vermont over other options for practical reasons: proximity, affordability, or friends/family

Traveler Profile

- » Are more likely to be traveling from nearby (New England or the Middle Atlantic)
- » Tend to travel as a couple, tend to be female, white, higher income, and have been in the state many times

Trip Experience

- » Often are in the state only for the day and tend to spend time shopping
- » Spend an average amount per day

Post-Trip Evaluation

- » Report the highest trip satisfaction, likelihood of recommending Vermont, and likelihood of returning to Vermont for a vacation

*Bennington, Rutland, Windham, and Windsor Counties make up south Vermont.
Major cities and towns include Rutland, Bennington, Brattleboro, and Hartford.

VISITOR PERSONAS



VISITOR PERSONAS: FALL

These clusters reflect how annual personas manifest under fall conditions:
Fall splits the annual clusters into more nuanced subtypes.

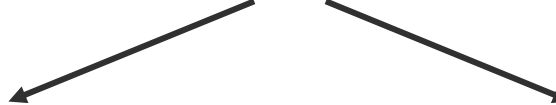
Local Outdoor Regulars



Fall Cluster A:
Low engagement,
repeat visitors

- 35% of fall visitors
- Trips are familiarity-driven rather than outdoor-driven
- Core activities are relaxing and spending time with friends/family
- Do few activities beyond these

Experience-Driven Explorers



Fall Cluster B:
Emphasizes
breadth

- 28% of fall visitors
- Want to “do it all”
- Emphasis on fall foliage while doing various activities
- Multi-region exploration

Fall Cluster C:
Emphasizes depth

- 24% of fall visitors
- Outdoor recreation is the anchor
- Food and local experiences add depth to the trip
- Long stays allow for deeper, more immersive travel

Social & Cultural Visitors



Fall Cluster D:
Social/
event-driven

- 13% of fall visitors
- Events and social occasions drive visitation
- Activities are planned around social gatherings

LOCAL OUTDOOR REGULARS: FALL

In the fall, local outdoor regulars:

- » Are similarly likely to be in the state for just the day and tend to remain within one region of the state compared to the annual profile
- » Rely on familiarity rather than trip planning tools, with little active research involved
- » Are less motivated by outdoor recreation and more by personal routines and the chance to relax
- » Participate in fewer activities than annual Outdoor Regulars, with casual or incidental engagement rather than planned outings
- » Participate in outdoor activities with less intensity, but more than other fall personas, and replace skiing with hiking
- » Show similarly low advertising recall and minimal influence from marketing
- » Travel in similarly small parties, most often solo or as couples
- » Reflect repeat exposure to Vermont and tend to travel from nearby in New England
- » Focus on visiting friends or family, casual dining, and nearby, low-effort activities
- » Report moderate satisfaction tied to comfort and familiarity rather than experiences

Key Takeaway: In fall, Local Outdoor Regulars shift toward familiarity-driven visits focused on relaxation.

EXPERIENCE-DRIVEN EXPLORERS: FALL

In the fall, experience-driven explorers with an emphasis on depth of experiences:

- » Continue to actively use planning resources to build multi-day leisure trips
- » Tend to travel broadly across multiple regions of the state, similar to the annual Explorer profile
- » Anchor trips around adventurous outdoor time and scenic drives to see foliage, though less recreation- and more foliage-focused
- » Are equally motivated by leisure travel but less likely to also be in the state visiting friends and family compared to annual Explorers
- » Report similar recall of advertising, but ads play a stronger role in trip decisions
- » Continue to have the highest share of visitors from more distant markets, particularly the South
- » Are more likely to travel as a couple and less likely as a family compared to annual Explorers
- » Show the same low day tripper prevalence as the annual profile, highlighting the emphasis on experiencing Vermont deeply
- » Are more likely to stay in vacation rentals or campgrounds in the fall
- » Are much more likely to be first-time or early-repeat visitors discovering Vermont, drawn by the fall foliage
- » Report higher trip satisfaction than annual Explorers

Key Takeaway: Fall highlights a depth-focused Explorer who builds longer trips around scenic drives and outdoor adventure.

EXPERIENCE-DRIVEN EXPLORERS: FALL (CONT'D)

In the fall, experience-driven explorers with an emphasis on breadth of experiences:

- » Mix cultural experiences and diverse attractions across more regions of the state
- » Engage more lightly in outdoor activities and more heavily in nearly every other activity, particularly sightseeing and cultural activities, with less emphasis on relaxation compared to the annual profile
- » Show a similar reliance on multiple planning sources when preparing for their trips
- » Are more likely to recall seeing advertising but less likely to report being influenced by it compared to annual Explorers
- » Have a smaller share of visitors from the New England area and more visitors from the South
- » Are more likely to travel as a couple and less likely to travel solo
- » Are much more likely to be first-time visitors
- » Have a greater tendency to stay in vacation rentals or hotels
- » Report higher trip satisfaction than both annual and depth-focused Explorers

Key Takeaway: Fall also draws first-time Explorers chasing foliage and variety more so than outdoor rec.

SOCIAL & CULTURAL VISITORS: FALL

In the fall, social and cultural visitors:

- » Plan their trips around social commitments or events, with destination planning added in afterward
- » Are equally motivated by visiting friends or relatives and slightly less by events and special occasions
- » Leaf peeping and scenic drives rise above outdoor recreation and cultural exploration
- » Show average advertising recall and influence
- » Show similarly high reliance on advice from friends and relatives in trip planning
- » Are similarly likely to travel from elsewhere in New England and to travel as a couple
- » Travel in larger groups
- » Though they represent the lowest repeat visitation among annual visitors, they have the highest among fall visitors who more often take once-in-a-lifetime leaf peeping trips to the state
- » Move across regions in ways shaped by event locations and social plans, though often stay in just one
- » Similarly frequently stay with friends or family, with some use of paid lodging
- » Report average satisfaction

Key Takeaway: Fall highlights a socially-anchored visitor whose trips revolve around iconic foliage experiences.

VERMONT TOURISM

Full Fall Visitor Tracking Report

October – November 2024
September – October 2025

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