

VERMONT TOURISM

Summer 2025 Visitor Tracking Report

June 1 – August 31, 2025

TABLE OF CONTENTS

03	<u>Visitor Journey</u>	11	<u>Pre-Visit</u>	67	<u>Seasonal Comparisons</u>
04	<u>Seasonal Snapshot</u>	24	<u>Traveler Profile</u>	70	<u>Regional Comparisons</u>
05	<u>Study Methods</u>	38	<u>Trip Experience</u>	80	<u>Visitor Personas</u>
10	<u>Detailed Findings</u>	60	<u>Post-Trip Evaluation</u>		

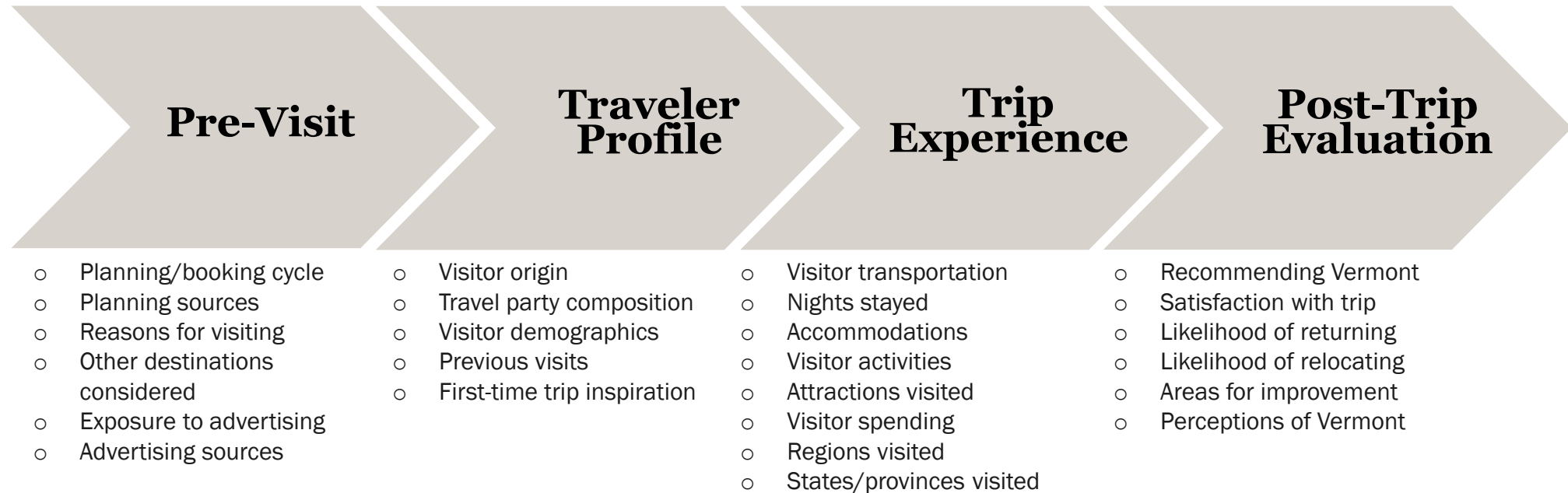
STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to Vermont from June 1, 2025 – August 31, 2025.

It represents months 9 through 11 of a 13-month data collection effort.

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 – SUMMER 2025

Pre-Visit

- » Visitors come to Vermont in the summer mainly for a **vacation/leisure trip** and **start planning** these trips a **month and a half** ahead of time
- » Leisure visitors come to Vermont for **outdoor recreation** (mainly **hiking**) and/or to simply **relax**
- » Vermont's **scenic beauty, relaxing atmosphere, and outdoor activities** convince summer visitors to **choose the state over others**

Traveler Profile

- » Vermont's summer visitors most commonly travel from **New England**, travel as a **couple** or as a **family**, stay in the state for **several days**, and **return to the state** year after year
- » That said, many summer visitors are in the state for the **first time**, having chosen it for its **beauty** and/or the chance to **go somewhere new**

Trip Experience

- » Most summer visitors go to the **northern** regions of the state, especially **Greater Burlington** and the **Upper Green Mountains**
- » You can find them enjoying **outdoor activities**, including **sightseeing**; spending time with **friends/family**; and enjoying **local food and drinks**

Post-Trip Evaluation

- » In describing Vermont in the summer, 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

2,899 surveys were completed by visitors to the state of Vermont between June 1st and August 31st, 2025. Data was collected online and in person at local attractions, visitor centers, food and drink establishments, museums, shops, downtown areas, and events.



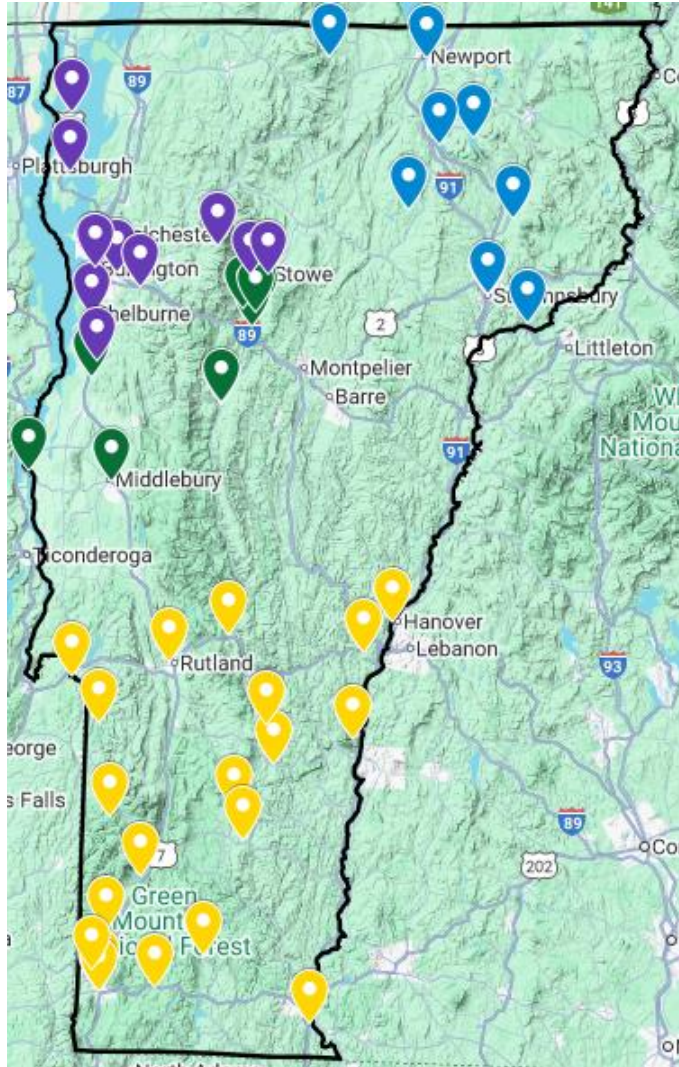
SURVEY SOURCES

Region	Responses	Percent
Northeast Kingdom	732	25%
Central	729	25%
South	724	25%
Northwest	714	25%
Total	2,899	100%

Survey Source	Responses	Percent
Intercept Interview	2,003	69%
Online	479	17%
State Parks Email	356	12%
QR Code	61	2%
Total	2,899	100%

Survey Source Breakdown	Responses	Percent
Intercept Interview	2,003	69%
Outdoor Rec	373	13%
Airport	322	11%
Attraction or Store	318	11%
Visitor Center	215	7%
Craft Beverages, Food + Farmers Markets	194	7%
Museum/Arts & Culture	188	7%
Hotel	107	4%
Downtown	101	3%
Event	98	3%
Ski Resort	87	3%
Online	479	17%
State Parks Email	356	12%
QR Code	61	2%
Total	2,899	100%

INTERCEPT SURVEY LOCATION MAP



Northeast Kingdom Survey Sites

- Hill Farmstead Brewery
- Lake Willoughby
- Waterford Welcome Center
- Crystal Lake State Park
- Jay Peak Resort
- Kingdom Trails
- Downtown Newport
- Fairbanks Museum & Planetarium

Northwest Survey Sites

- Church Street Market
- Burlington Airport
- Trapp Family Lodge
- Grand Isle State Park
- Underhill State Park
- Burlington Waterfront
- Hero's Welcome
- Shelburne Museum
- Mt. Philo State Park
- Downtown Stowe
- Hotel Vermont
- Williston Welcome Center

Central Survey Sites

- Ben & Jerry's
- Cold Hollow Cider Mill
- Little River State Park
- Waitsfield Shopping Center
- Dakin Farm
- The Middlebury Inn
- Lawson's Finest Liquids
- Waterbury Center State Park
- Chimney Point State Historic Site

Events

- Stowe Balloon Festival
- Summer Dog Party
- Blueberry Fest
- Best of Vermont Summer Fest

South Survey Sites

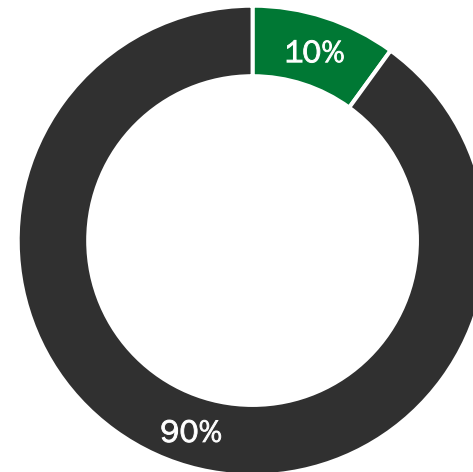
- Guilford Welcome Center
- Bennington Welcome Center
- Bennington Museum
- Vermont Country Store
- Hildene
- Fair Haven Welcome Center
- Woodford State Park
- Lake St. Catherine State Park
- Pine Hill Park
- Bennington Battle Monument
- Camp Plymouth State Park
- Merck Forest
- Quechee State Park
- Mt. Ascutney State Park
- Lake Paran
- Lowell Lake State Park
- Lake Shaftsbury State Park
- Gifford Woods State Park
- King Arthur Baking Company

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
- » **10%** of Vermont's summer visitors **are just passing through** the state on their way to another destination
- » **47%** of visitors encountered at **Vermont Welcome Centers** are just passing through the state

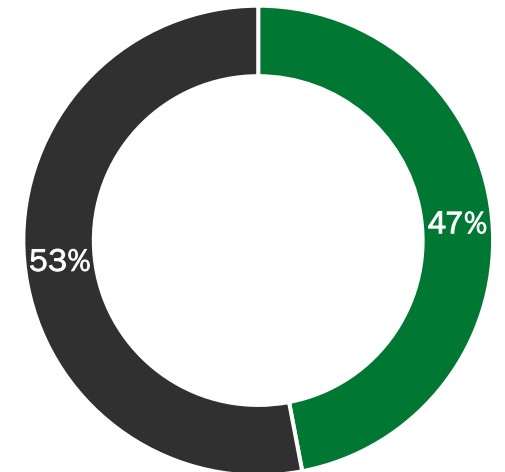
Visitors Only Passing through Vermont

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

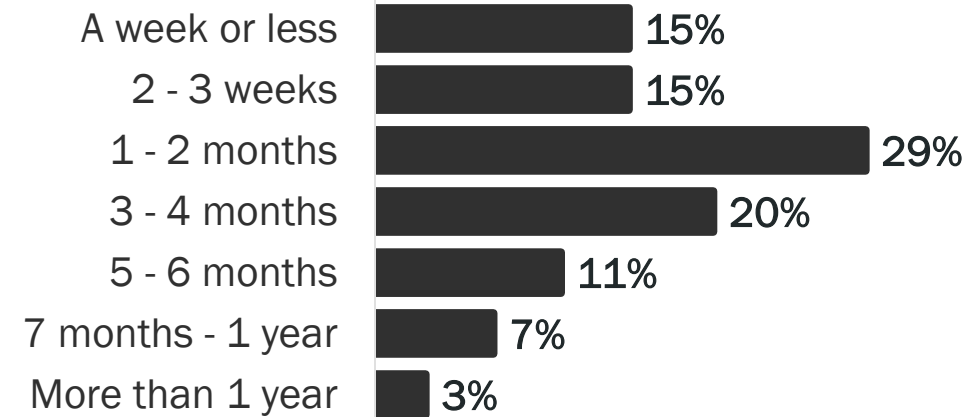


TRIP PLANNING CYCLE

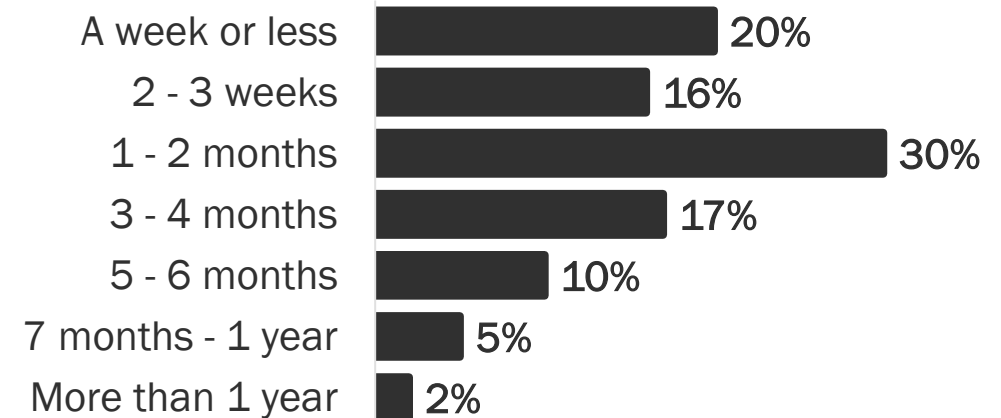
The average summer Vermont visitor spends about 9 days planning their trip before booking.

- » Typical summer visitors began planning their trip to Vermont **48 days** in advance
- » Typical visitors booked accommodations or definitively decided to take the trip **39 days** in advance

Beginning of Trip Planning Cycle¹



Booked Accommodations/Made Trip Decisions²



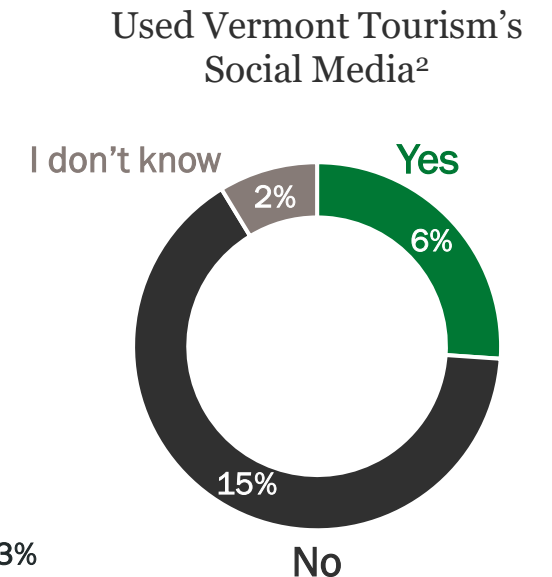
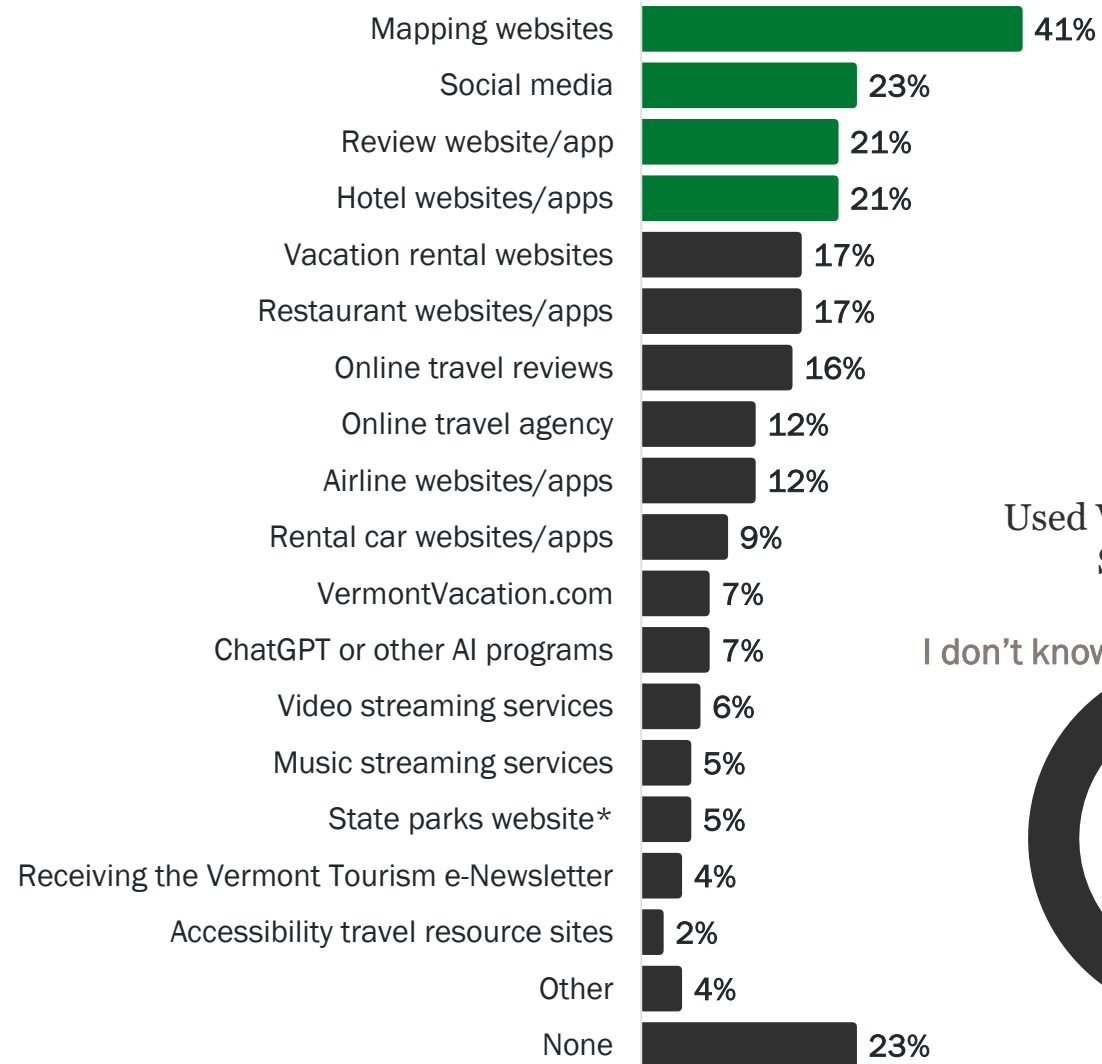
¹ How far in advance did you start planning this trip?

² How far in advance did you book accommodations or definitely 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 summer trip planning source by a large margin, used by over **2 in 5** visitors
- » **Social media, review websites/apps, and hotel websites/apps** are other popular sources, used by around **1 in 5**
- » **6%** of summer 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.*

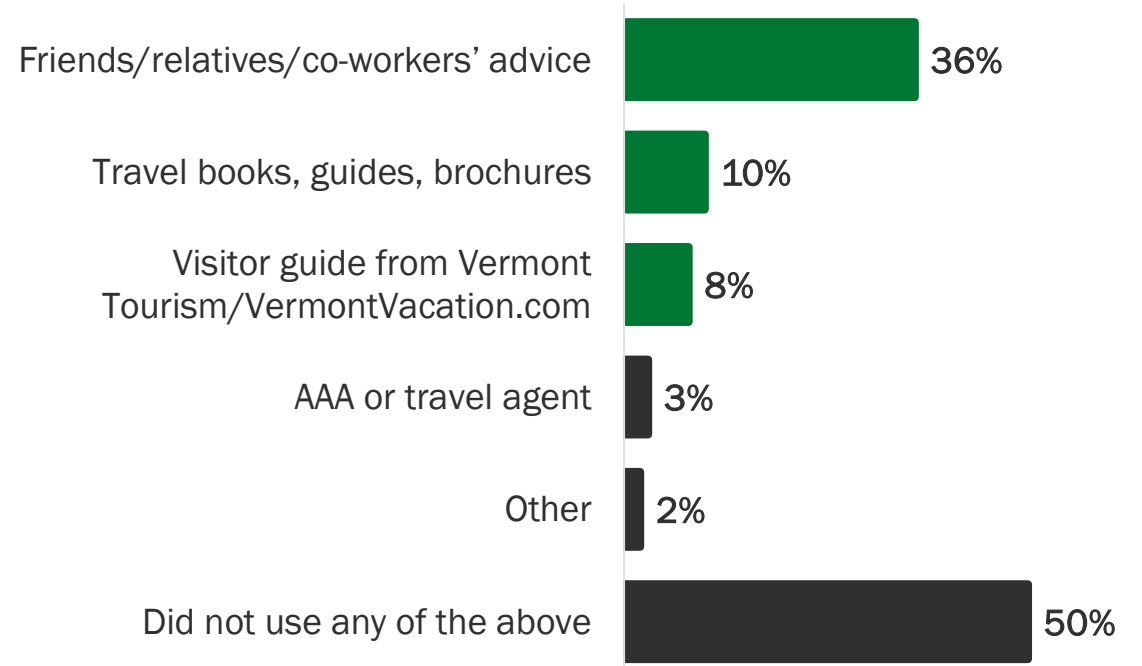
² You mentioned you used social media as a source to help plan this trip. Did that include Vermont Tourism's official social media? *Percents out of all visitors.*

*Coded from "Other" write-in responses.

OTHER TRIP PLANNING SOURCES¹

Half of Vermont's summer visitors turn to offline resources for information about their trip.

- » **Word of mouth** is the most popular offline trip-planning resource among summer visitors, used by **over 1 in 3** visitors
- » **Travel books, guides, and brochures** follow distantly, used by **1 in 10** visitors
- » **8%** of visitors used **Vermont's Visitor Guide** in their trip planning

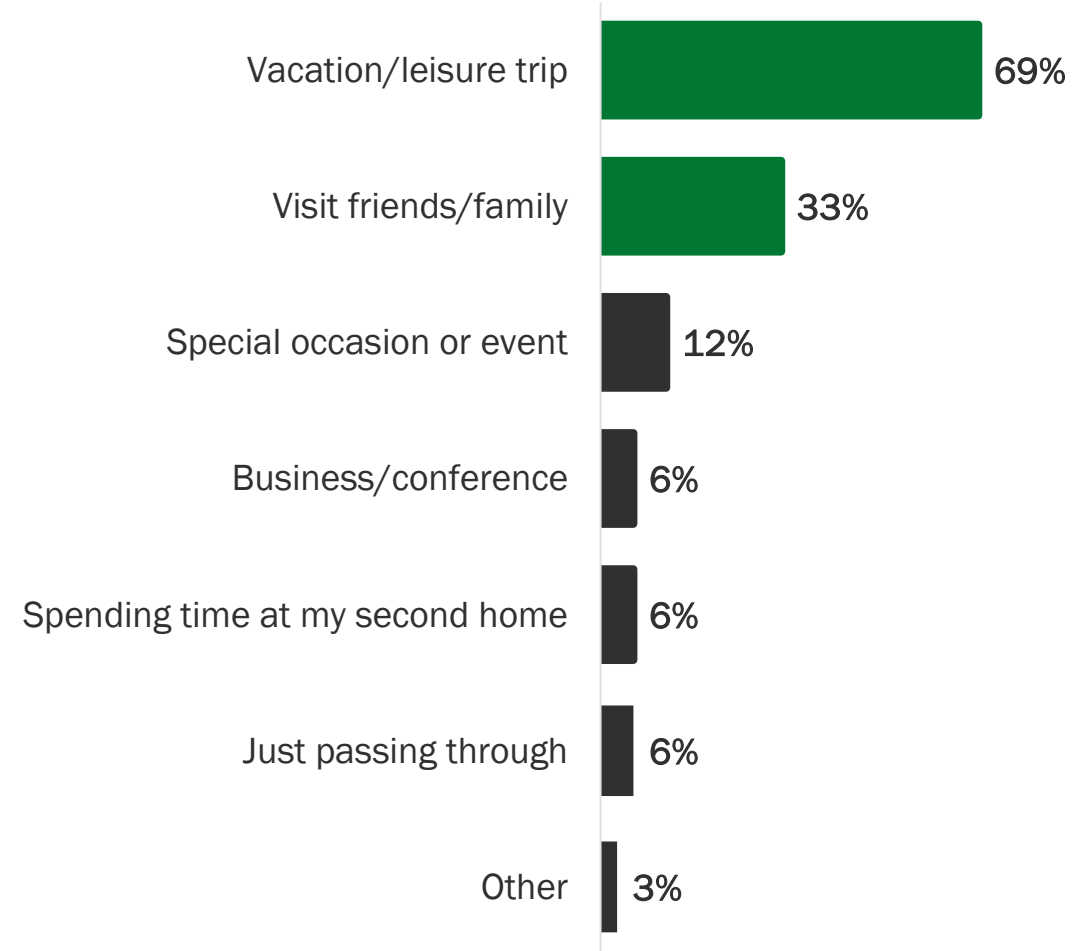


¹ When you were planning this trip, what other sources of information did you use? *Multiple responses permitted.*

REASONS FOR VISITING¹

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

- » Nearly **7 in 10** visitors came to Vermont for a **vacation/leisure trip**
- » **1 in 3** came to the state to **visit friends and family**

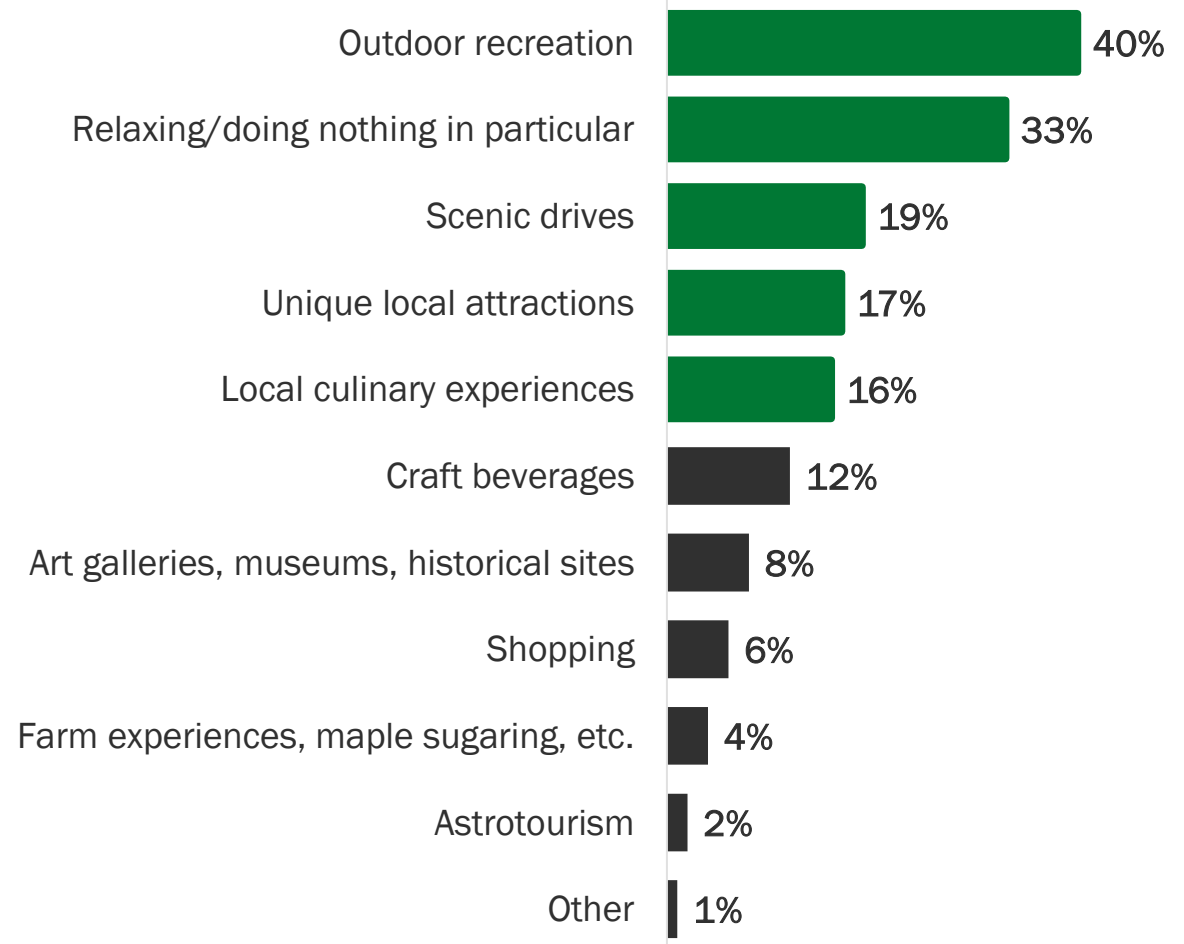


¹ What was your main reason for taking this trip to Vermont? Up to 3 responses permitted.

TYPE OF LEISURE TRIP¹

Breaking leisure visitors down into more specific reasons for visiting:

- » **2 in 5** visitors came to enjoy **outdoor recreation**, making it the most popular reason to visit Vermont in the summer
- » **1 in 3** came to simply **relax**
- » **Scenic drives, unique local attractions, and local culinary experiences** were also popular draws for summer visitors

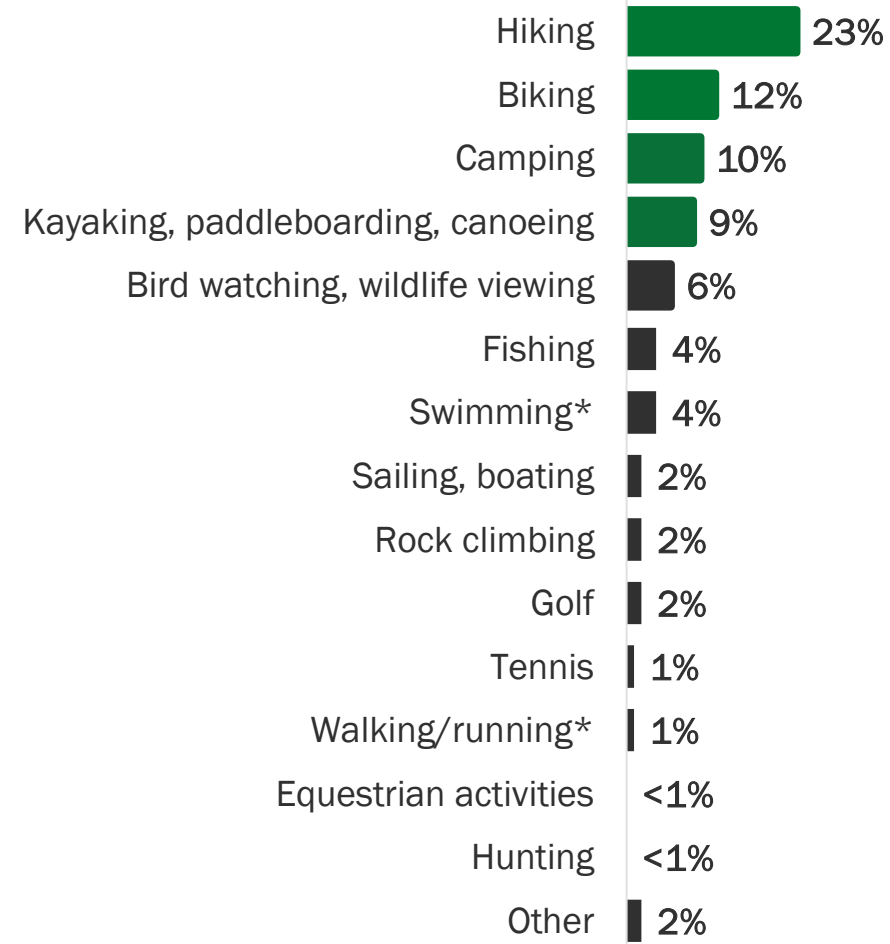


¹ What type of vacation/leisure trip? Multiple responses permitted. Percents out of all visitors.

TYPE OF OUTDOOR RECREATION¹

Digging into the 2 in 5 of Vermont's summer visitors who came to the state for its outdoor recreation:

- » The top outdoor recreation draw is **hiking**
 - » **Nearly 1 in 4** summer visitors came to the state to hike
- » Another around **1 in 10** came to **bike, camp, or paddle**
- » **Over 4 in 5** outdoor rec visitors intended to engage in **more than one** outdoor activity



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

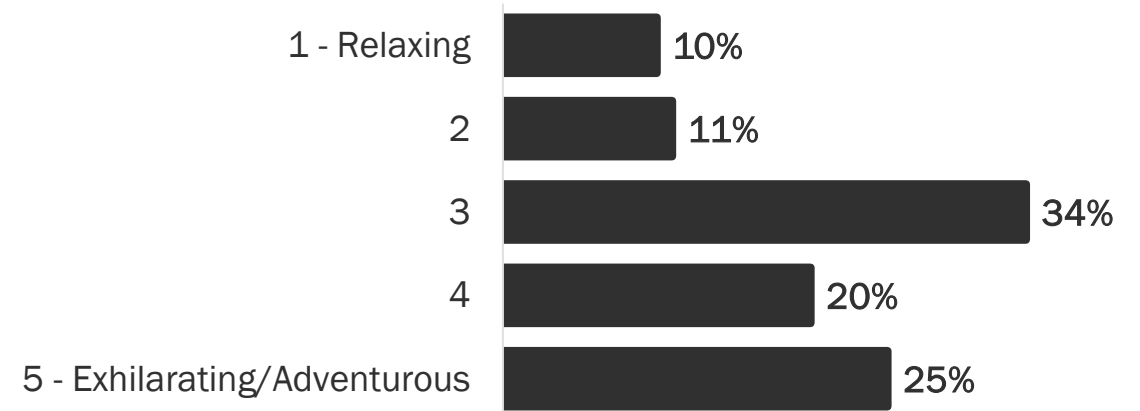
*Coded from "Other" write-in responses.

RATING OUTDOOR RECREATION¹

Of the 2 in 5 summer visitors who came to Vermont to spend time outdoors:

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

Outdoor Activity Ratings

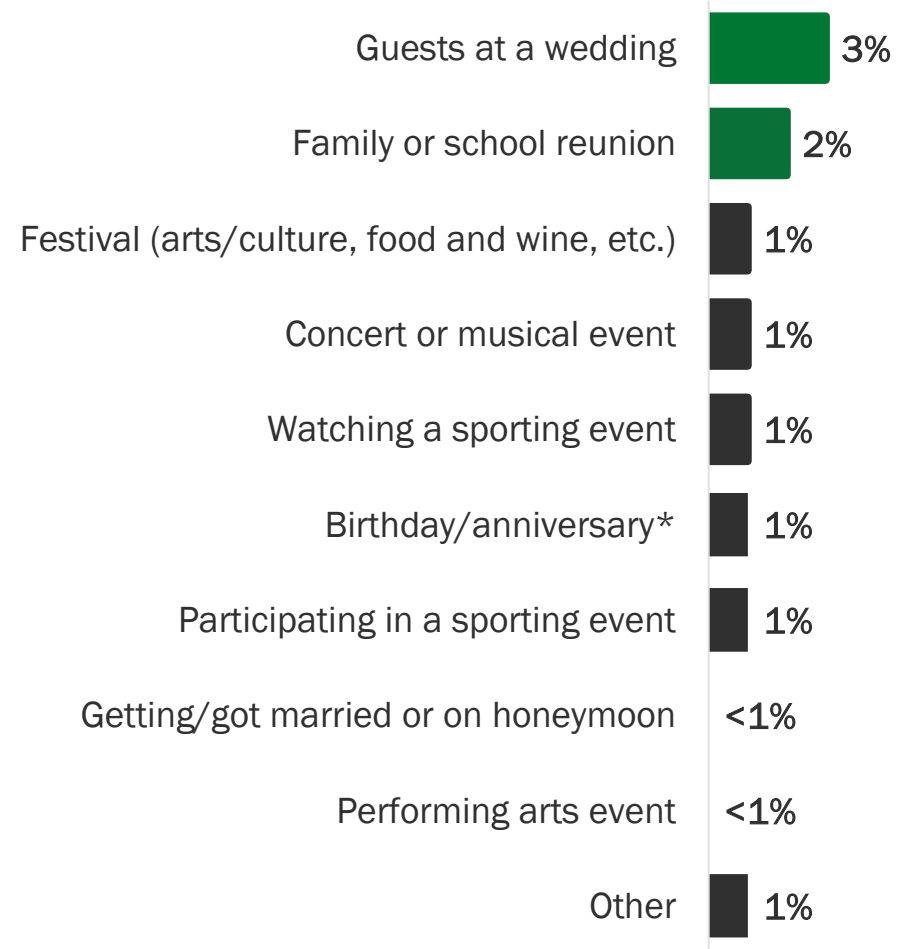


¹ How would you rate your outdoor recreation activities in Vermont, where 1 is relaxing outdoor activities and 5 is exhilarating/adventurous outdoor activities?
Percents out of visitors who came to Vermont for outdoor recreation.

TYPE OF SPECIAL OCCASION/EVENT¹

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

» Most of these visitors come to the state to attend a **wedding** or a **reunion**



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

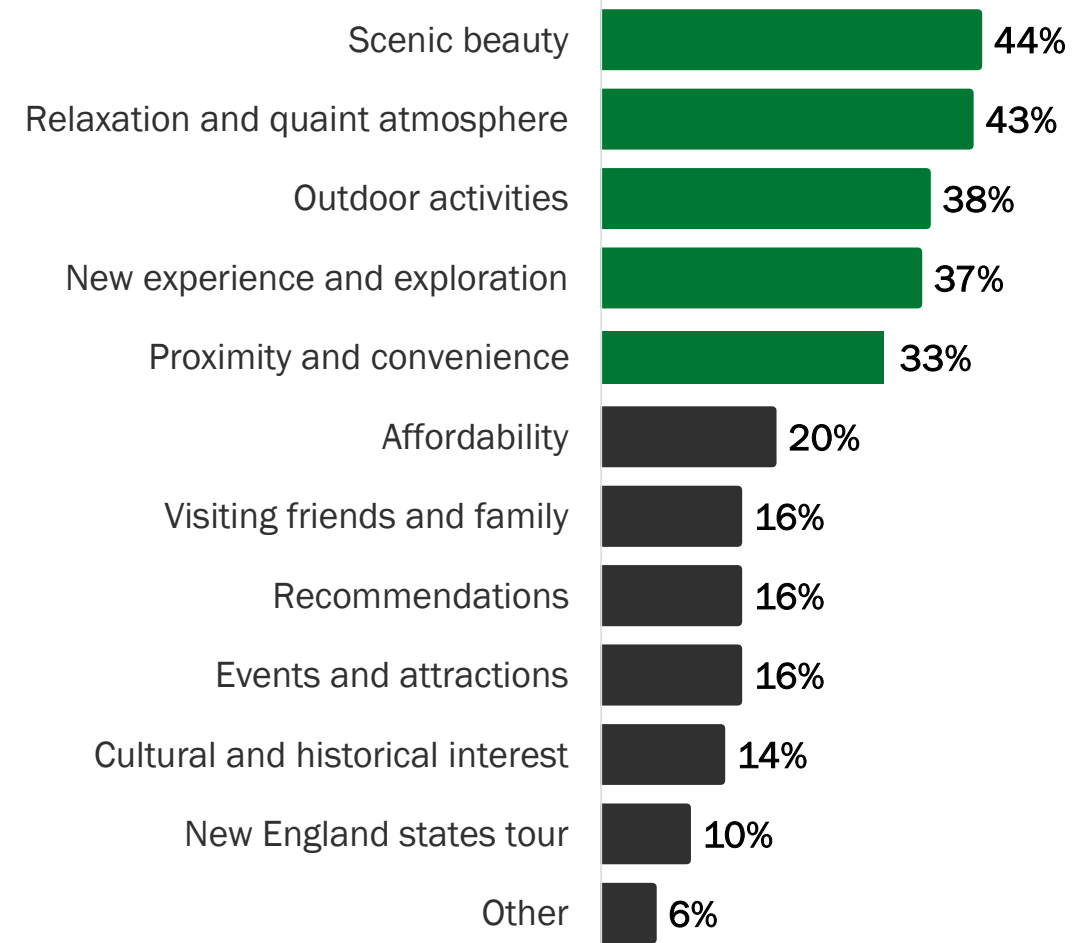
*Coded from "Other" write-in responses.

REASONS FOR CHOOSING VERMONT

16% of summer visitors considered other destinations before choosing to travel to Vermont.¹

- » **Over 2 in 5** of those who considered other destinations ended up choosing Vermont for its **scenic beauty** or **relaxing, quaint atmosphere**
- » Another **nearly 2 in 5** settled on Vermont for its **outdoor activities** or **opportunities for new experiences**
- » **1 in 3** chose the state for its **convenient location**

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.

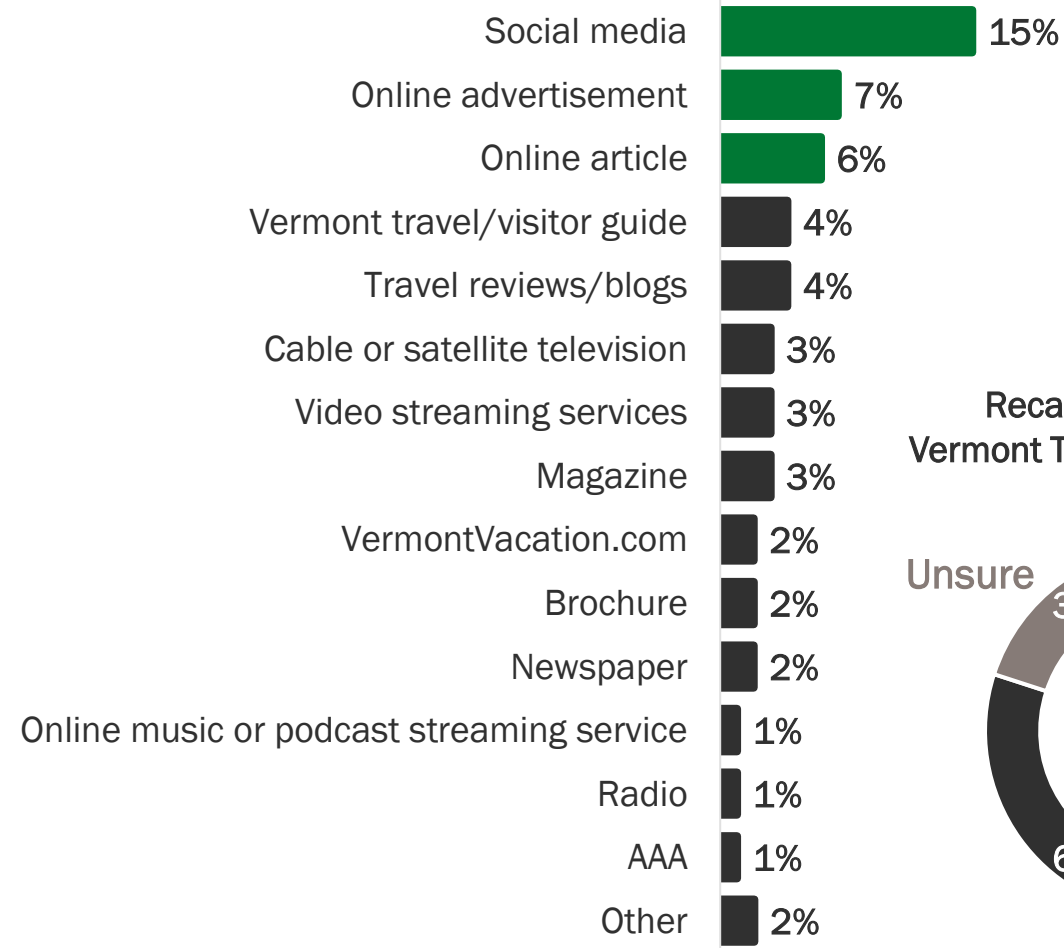
PRE-TRIP RECALL OF ADVERTISING

Over 1 in 3 summer visitors recalled seeing ads for Vermont before their trip.¹

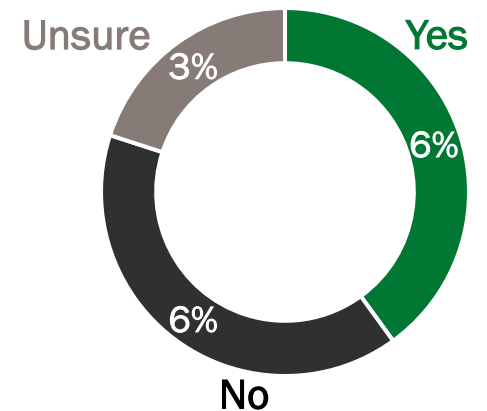
» **Social media** was the most common source of ad recall, followed distantly by **online ads** and **online articles**

» **6%** of all visitors recalled seeing ads on **Vermont Tourism's social media**

Sources of Ad Recall²



Recalled Seeing Ads on Vermont Tourism's Social Media³



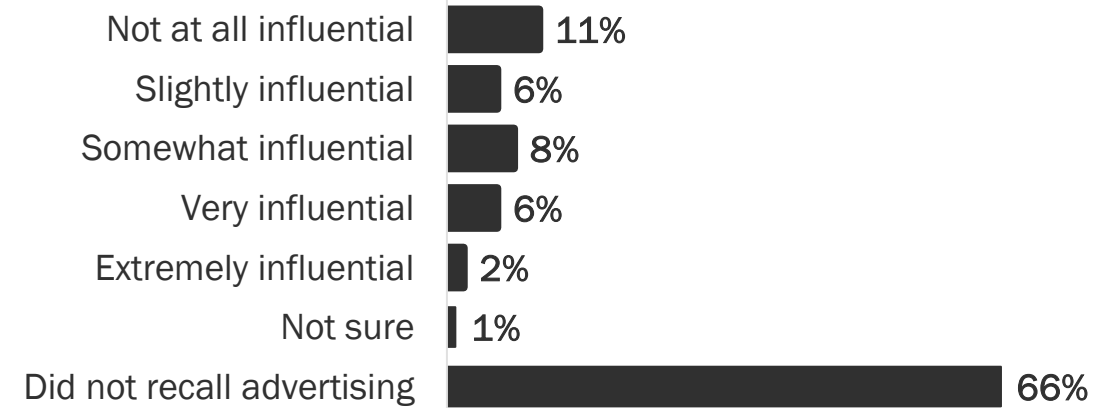
¹Over the past six months, have you seen, read, or heard any travel stories, advertising, or promotions for Vermont?

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

» **16%** of visitors found advertising, promotions, or travel stories **influential** in their decision to travel to Vermont



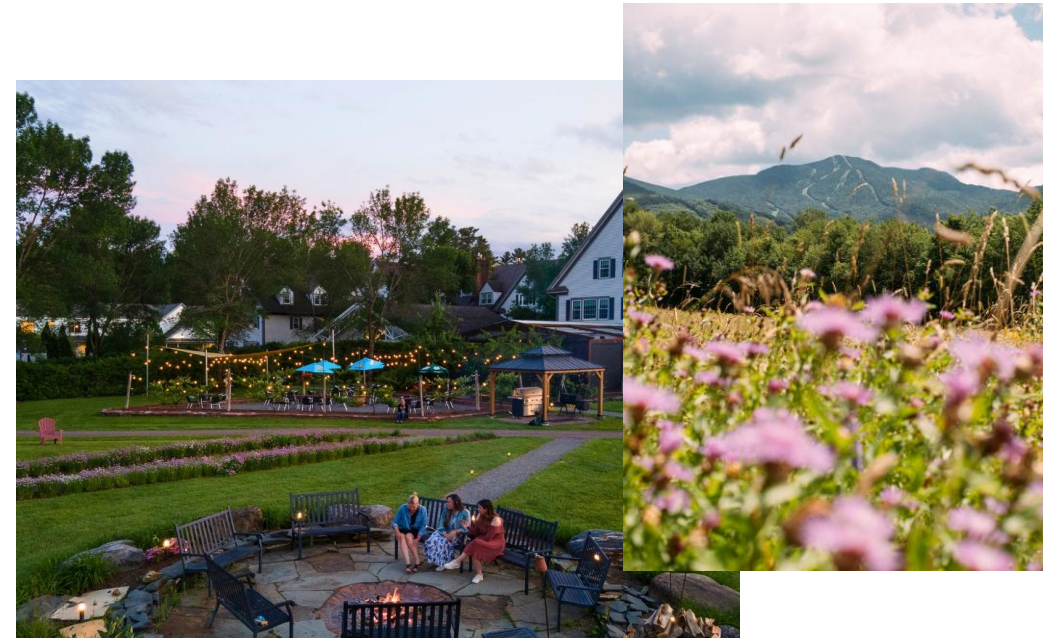
¹ How influential were these travel stories, advertising, and promotions in your decision to come to Vermont? *Percents out of all visitors.*

PRE-VISIT SUMMARY

TOP DRAWS WHY VERMONT?

Visitors are drawn to Vermont in the summer for the chance to slow down, re-center, and connect with nature. From the people to the farm-to-table food to the rugged trails, everything is genuine, raw and organic – life made simple.

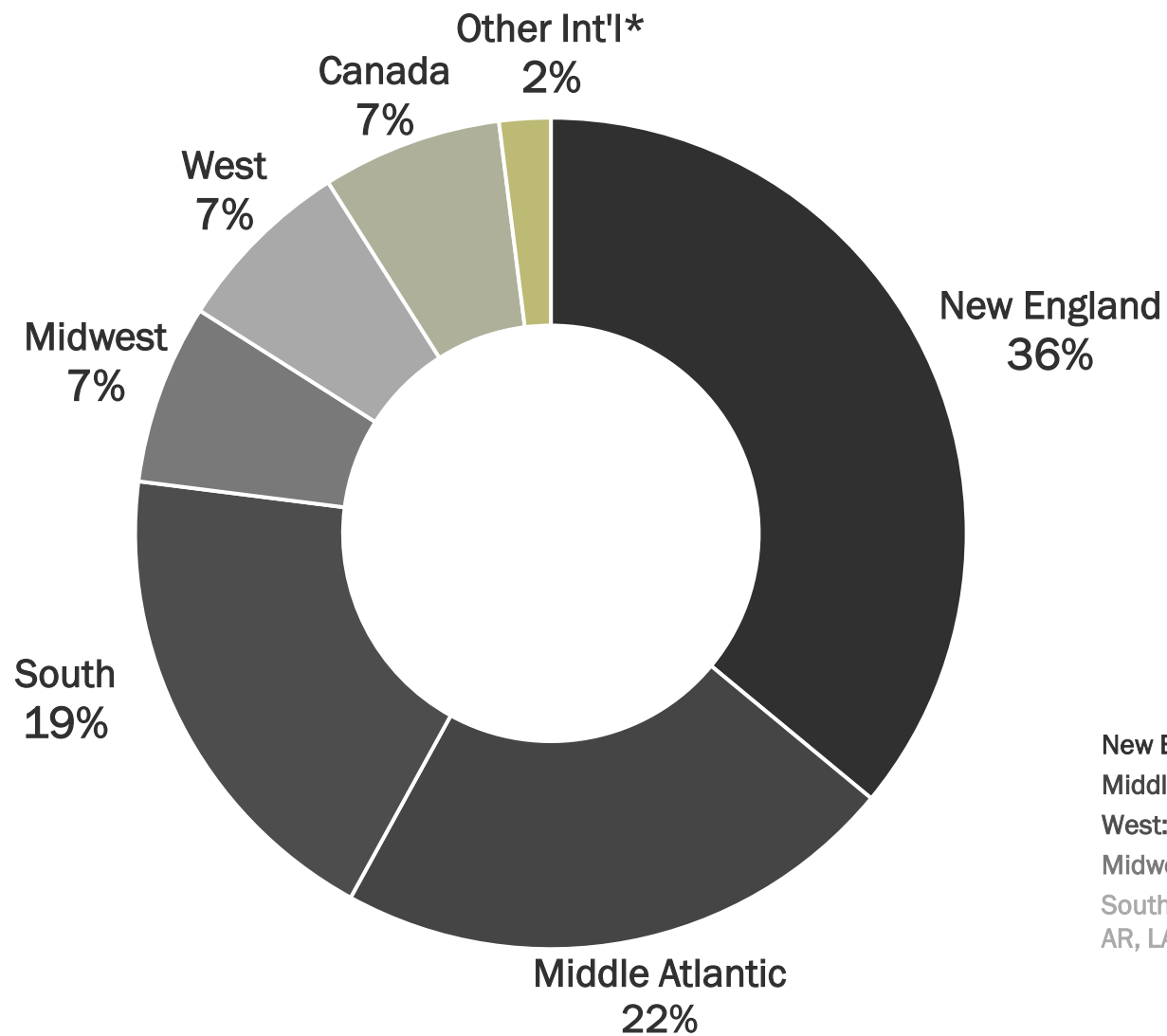
Summer visitors plan their trips early, looking forward to time away from busy lives to soak in Vermont's tranquility and breathe its fresh air. While they could choose to travel elsewhere, they are drawn to Vermont for its outdoor-centric and rustic nature – a breathtaking, stress-free vacation.



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 Germany (0.4%).

TOP ORIGIN STATES & PROVINCES

- » **Over 4 in 5** visitors traveled from 17 U.S. states and 2 Canadian provinces
- » Most **domestic** visitors travel from **elsewhere in the northeast**, especially New England
- » **7%** of visitors traveled from **Canada**

State/Province	Percent of Visitors
Massachusetts	16%
New York	12%
Connecticut	8%
New Hampshire	6%
Florida	5%
New Jersey	5%
Pennsylvania	5%
Quebec	4%
California	3%
Maine	3%
Texas	3%
Maryland	2%
Minnesota	2%
North Carolina	2%
Rhode Island	2%
Virginia	2%
Ontario	2%
Other States/Provinces ¹	18%

¹ Fewer than 2% of visitors traveled from each other state or province.

TOP ORIGIN MARKETS

- » **Over half** of summer visitors traveled from **10** U.S. markets
- » Summer visitors most commonly travel to Vermont from the **Boston** or **New York** areas

U.S. Market	Percent of Visitors
Boston	14%
New York ¹	10%
Hartford-New Haven	7%
Albany-Schenectady-Troy	4%
Philadelphia	4%
Springfield-Holyoke	4%
Portland-Auburn	3%
Burlington-Plattsburgh	2%
Providence-New Bedford	2%
Washington, DC-Hagerstown ²	2%
Other Markets ³	48%

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

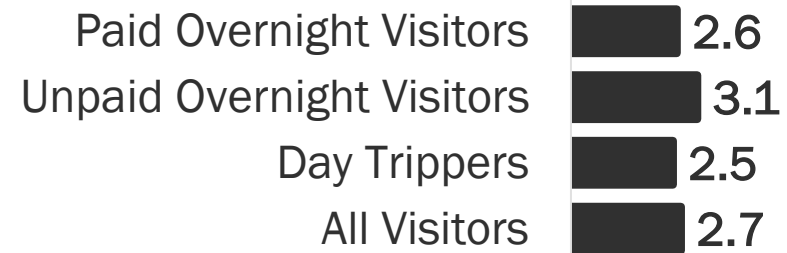
² Includes some markets in Maryland, Virginia, and West Virginia.

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

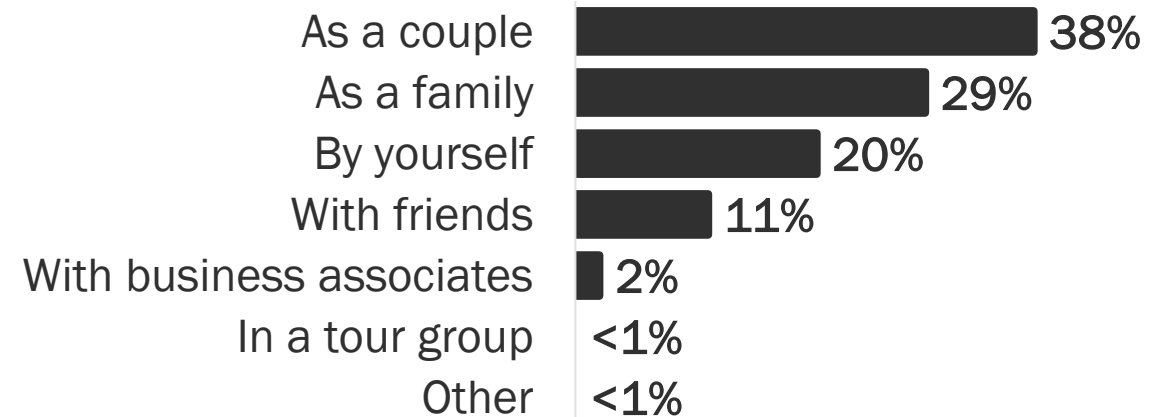
TRAVEL PARTIES

- » 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
 - » Day trippers travel in the smallest parties
- » **Nearly 1 in 4** summer visitors traveled with one or more **children⁴** in their travel party

Travel Party Size by Visitor Type²



Travel Party Composition³



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

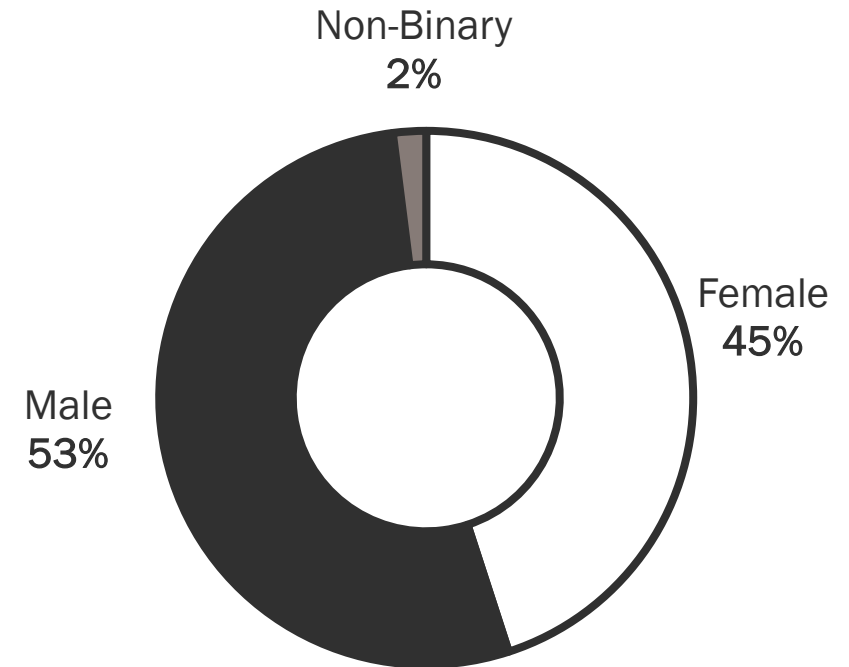
² Including yourself, how many people were in your immediate travel party on this specific trip in Vermont?

³ On this trip, are you traveling:

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

GENDER¹

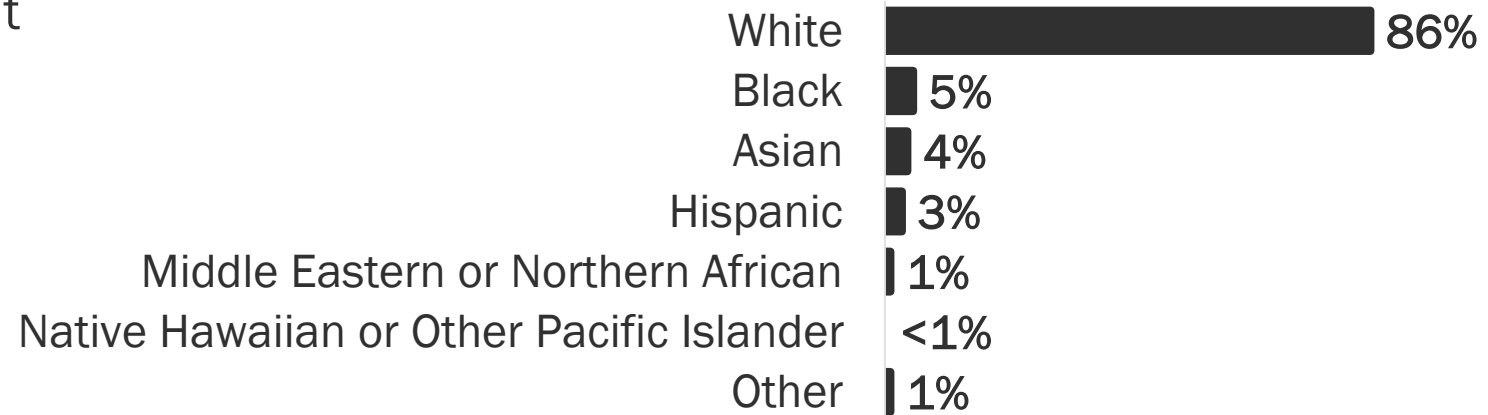
- » Just over **half** of summer visitors to Vermont interviewed were **males**
- » This demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.



RACE & ETHNICITY¹

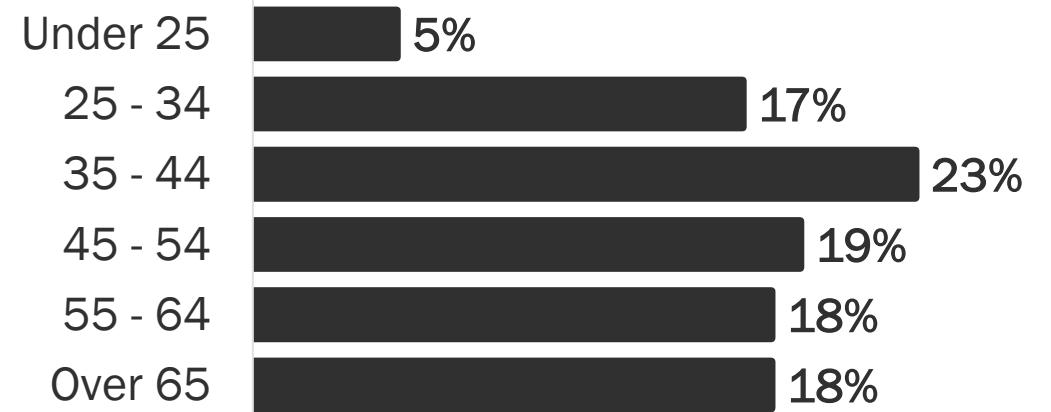
» **Nearly 9 in 10** summer visitors to Vermont identified their race as **White/Caucasian**

» 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?

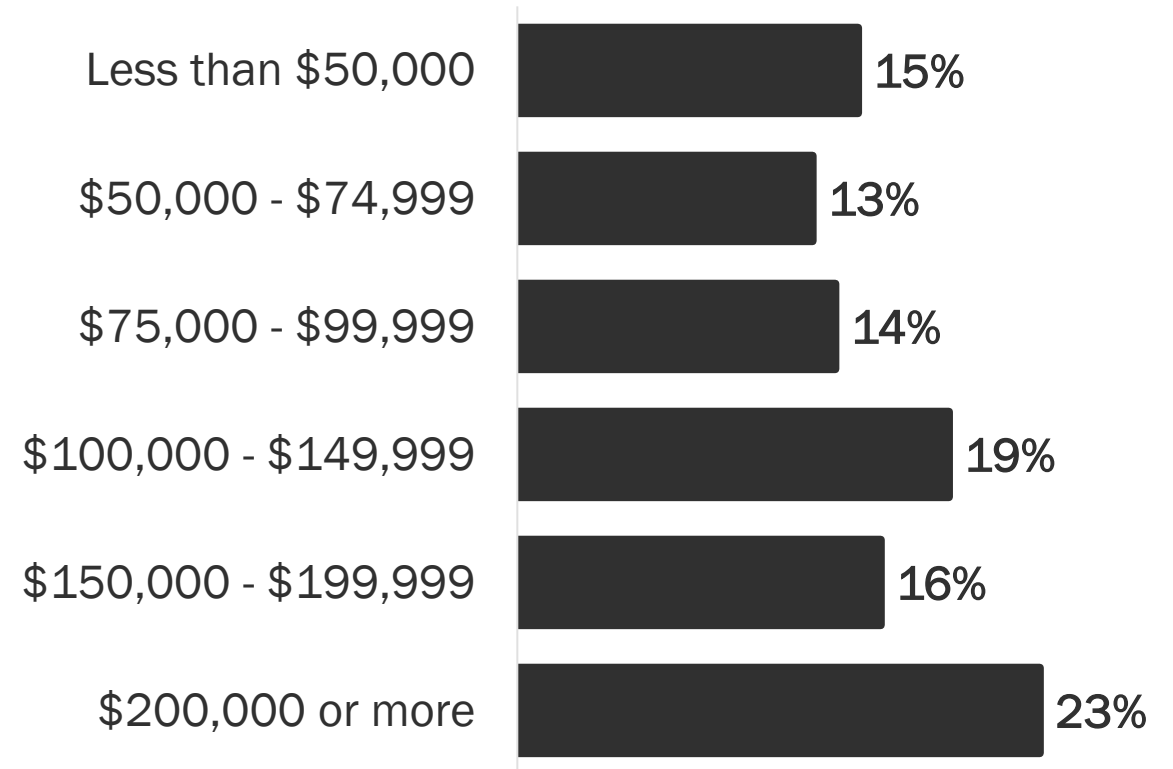
- » The median **age** of adult summer visitors to Vermont who participated in this survey on behalf of their travel party is **47** years old
- » This demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.



¹ Which category best fits your age?

HOUSEHOLD INCOME¹

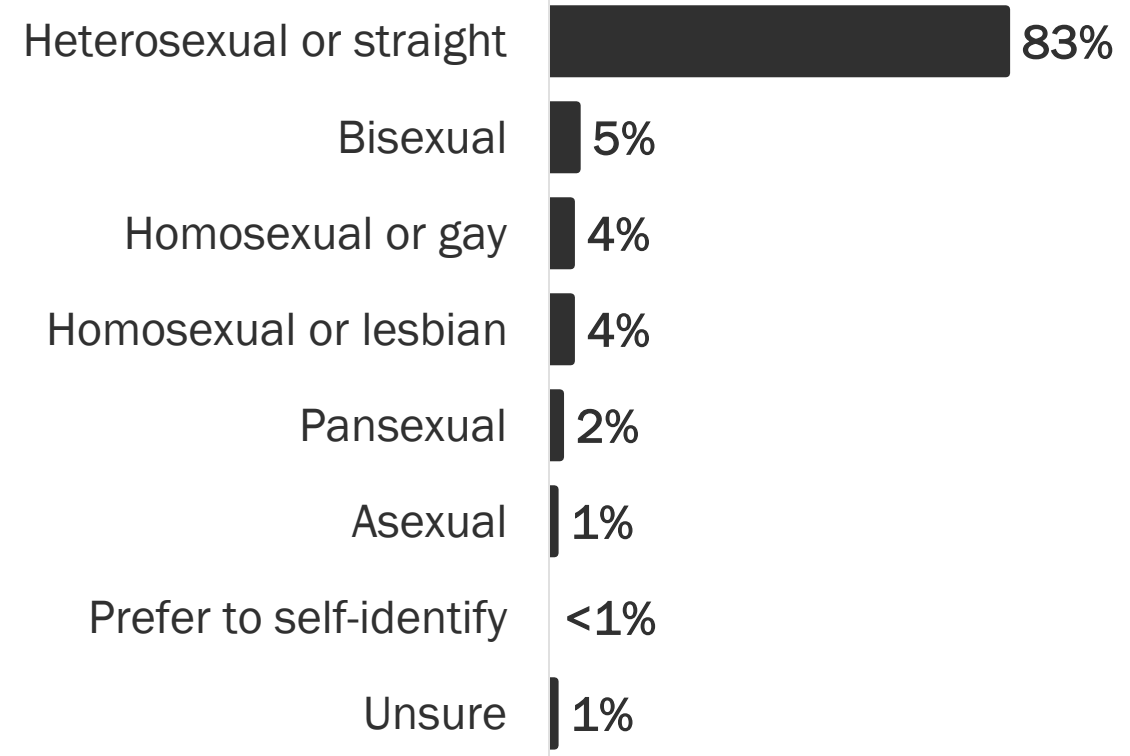
- » The median annual household **income** of summer visitors to Vermont is **\$121,050**
- » **58%** of summer visitors to Vermont earned **more than \$100,000** per year
- » **23%** earned more than **\$200,000**



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

SEXUAL ORIENTATION¹

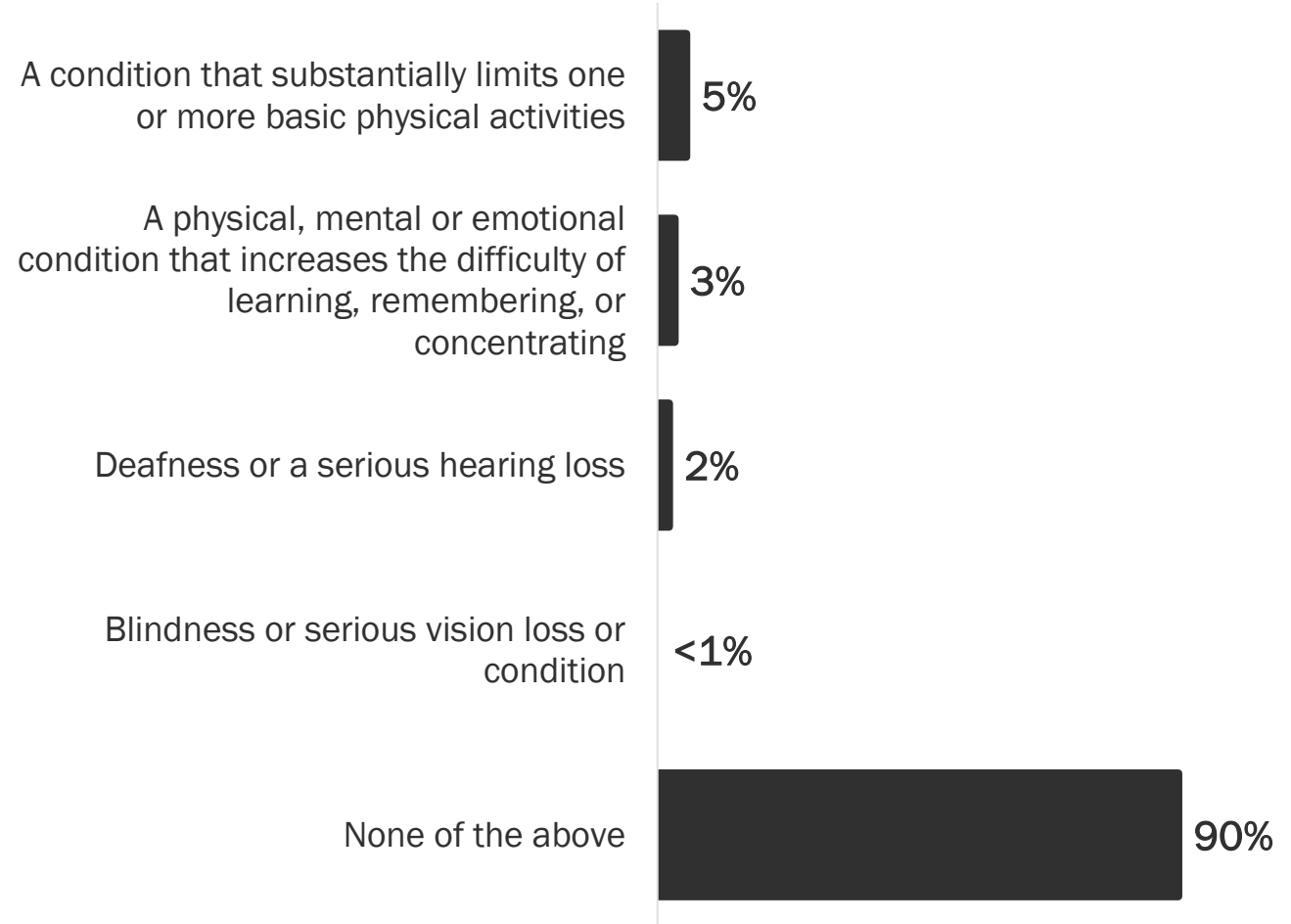
- » **Over 4 in 5** summer visitors to Vermont considered themselves **heterosexual** or straight
- » **17%** did **not** consider themselves heterosexual
 - » **5%** considered themselves **bisexual**
 - » **8%** considered themselves **gay or lesbian**
- » This demographic data reflects the surveyed 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

- » **10%** of summer 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 **5%** of visitors
- » **90%** reported **not** having a disability

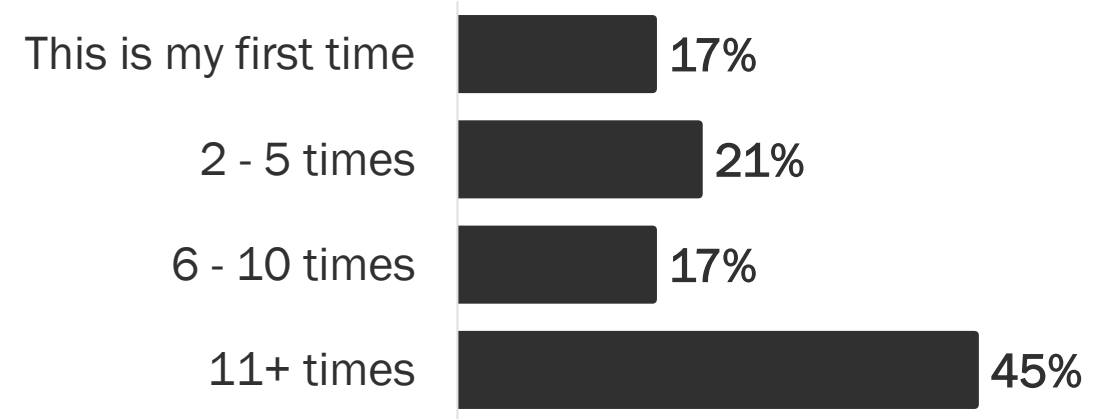


¹ Does anyone in your travel party have any of the following long-lasting conditions, disabilities, functional limitations or health problems? *Multiple responses permitted.*

NEW & RETURNING VISITORS¹

Vermont's summer visitors tend to come to the state frequently.

- » **Nearly half** had been to Vermont **more than 10 times**
- » That said, **17%** of summer visitors were in the state for the **first time**

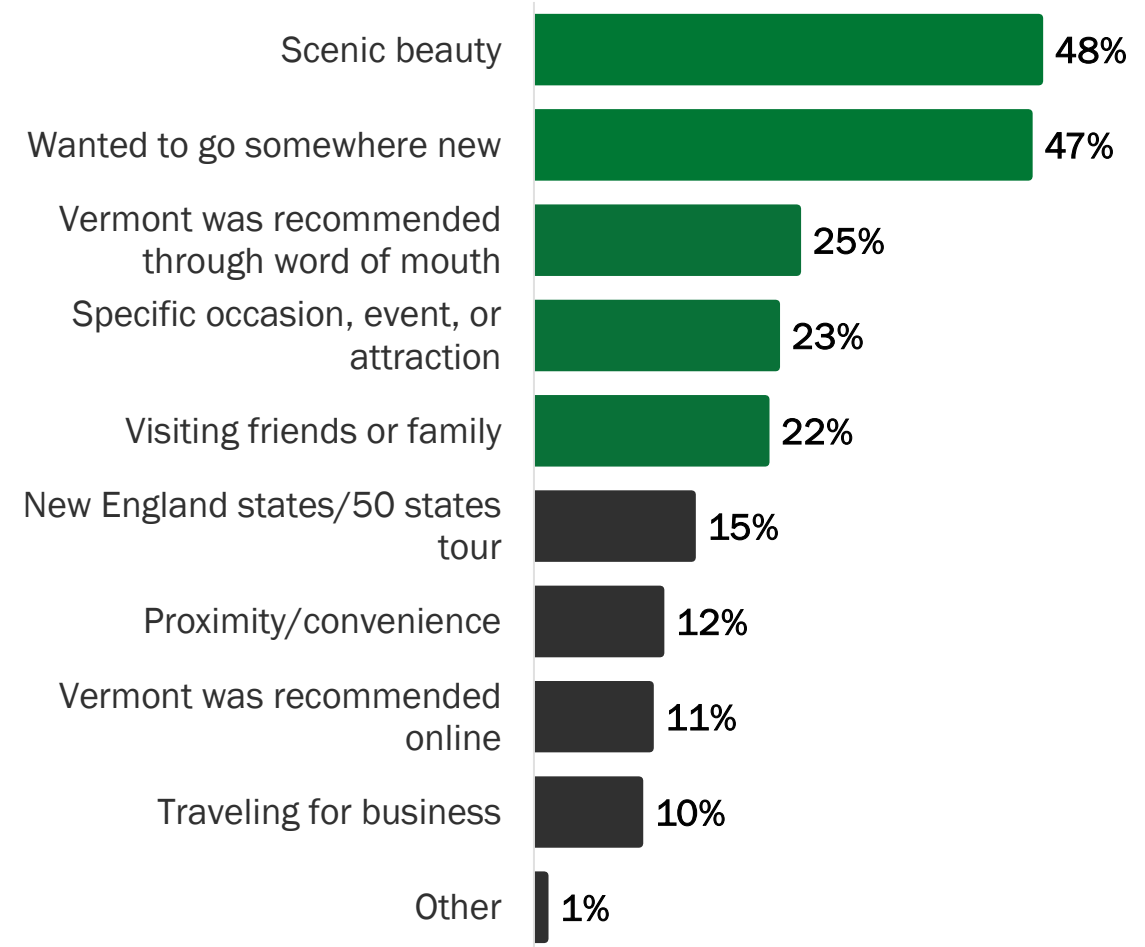


¹ Approximately how many times have you visited Vermont?

REASONS FOR FIRST TRIP TO VERMONT¹

Of the 17% of Vermont's summer visitors who were in the state for the first time:

- » **Nearly half** came to Vermont for its **scenic beauty** or because they **wanted to go somewhere new**
- » Another around **1 in 4** visited Vermont after hearing it recommended through word of mouth, for a **special occasion or event**, or to **visit friends and family**



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 SUMMER VISITOR WHO ARE THEY?

Vermont's summer visitors tend to be couples or families traveling to the state for a vacation. Most live somewhere in New England, so Vermont is a convenient destination for them. Many have friends and family in the state.

But while most have been to the state many times, summer also draws new visitors who have heard good things about Vermont and want to explore its beauty for themselves.

Whether visiting for the first time or the tenth time, summer visitors look forward to a rejuvenating time in Vermont's mountains, lakes, and towns.



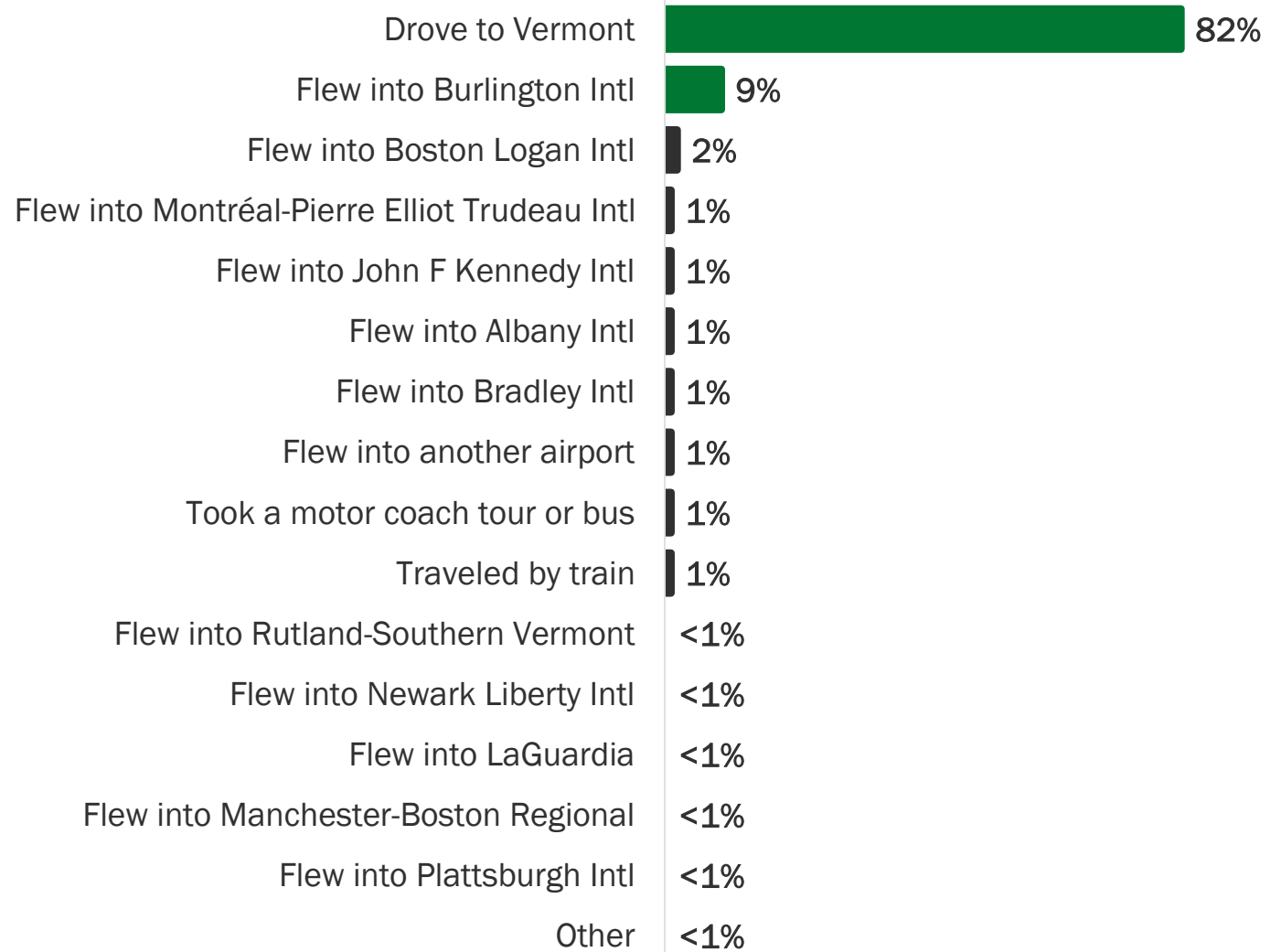
VISITOR JOURNEY : TRIP EXPERIENCE



MODES OF TRANSPORTATION¹

Vermont is a drive market for most visitors.

- » **Over 4 in 5** chose to **travel by car** over plane, motor coach/bus, or train
- » **6%** 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

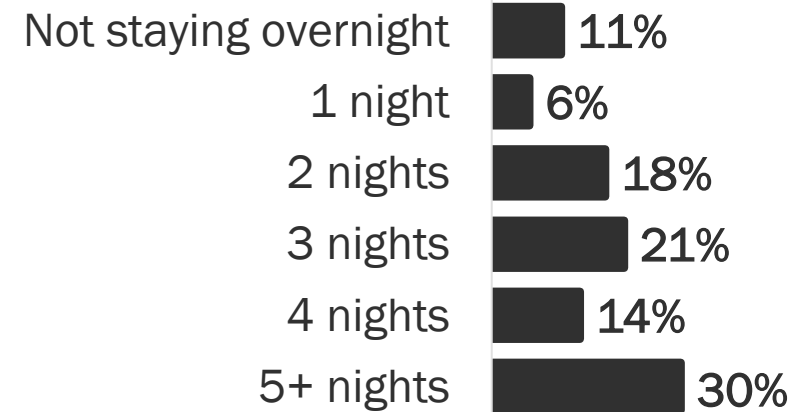
Nearly 9 in 10 summer visitors stayed **one or more nights** in Vermont on their trip.

» Typical visitors stayed **4.4 nights²** in the state

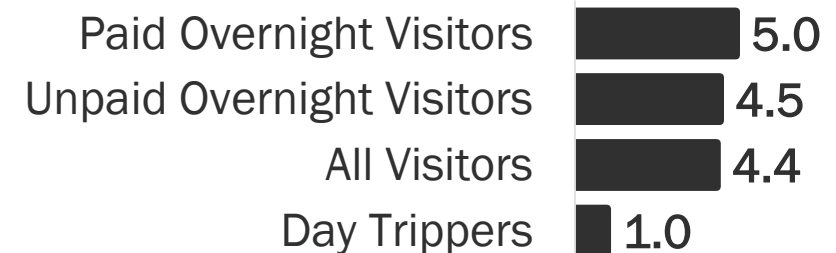
» Typical visitors staying overnight in **paid accommodations** stayed **5.0 nights**

» For visitors staying in a **hotel**, the average length of stay was **3.6 nights**. For those staying in a **vacation rental**, it was **4.9 nights**.

Nights Stayed Breakdown



Nights Stayed by Visitor Type



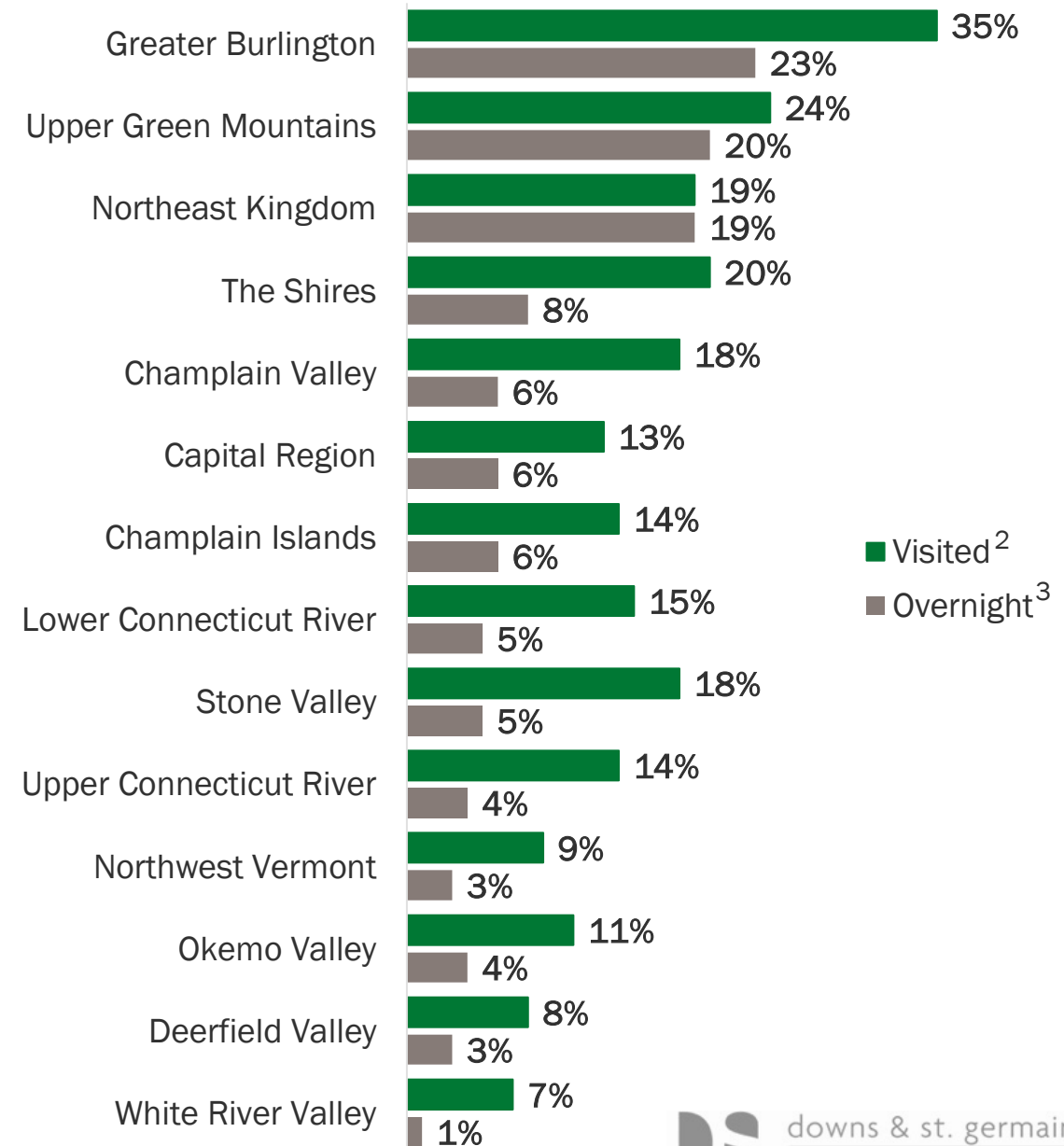
¹ How many nights are you staying in Vermont on this trip?

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

REGIONS STAYED IN AND VISITED¹

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

» **Greater Burlington**, the **Upper Green Mountains**, and the **Northeast Kingdom** 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>

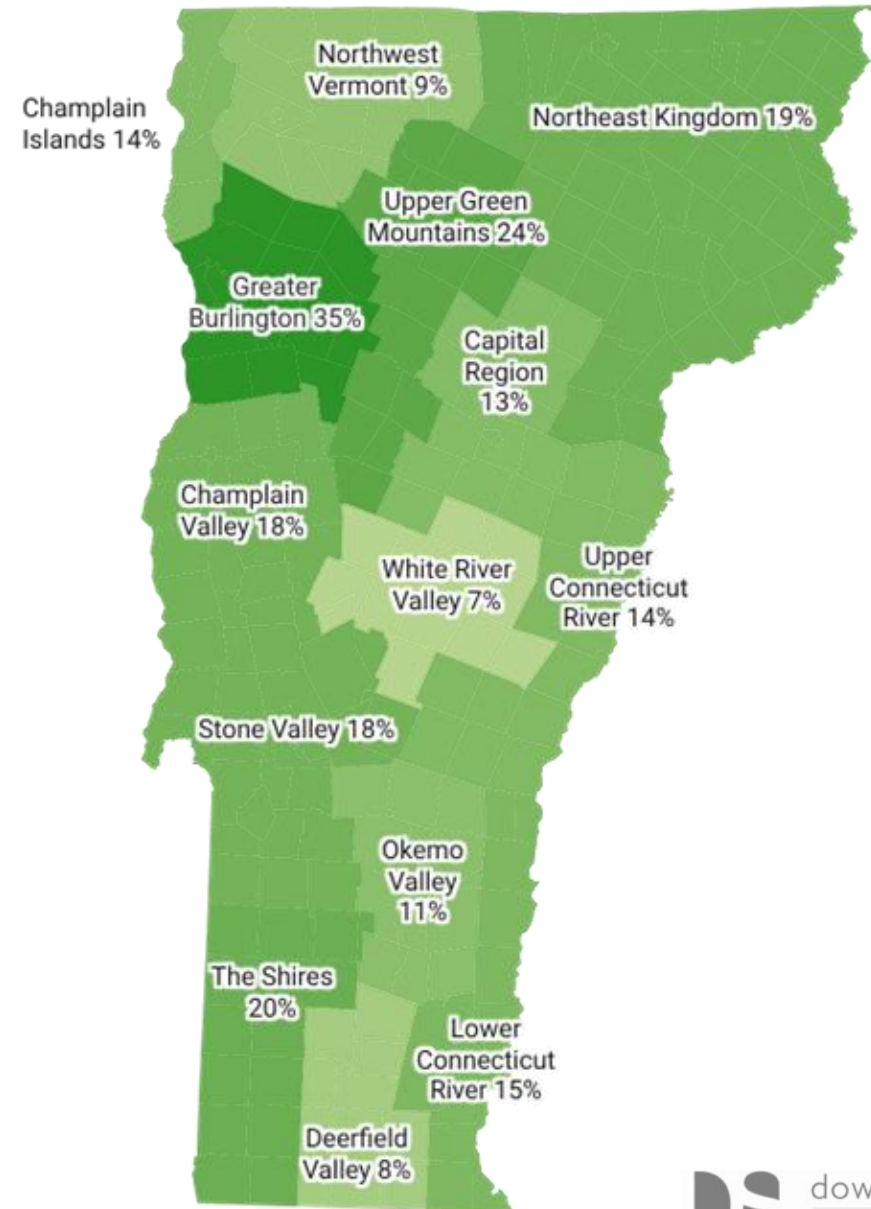
² Which regions of Vermont do you intend to visit on this trip?

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 summer visitors:
- » Around **1 in 5** visited **The Shires** or the **Northeast Kingdom**
- » **18%** visited the **Champlain Valley** or **Stone Valley**

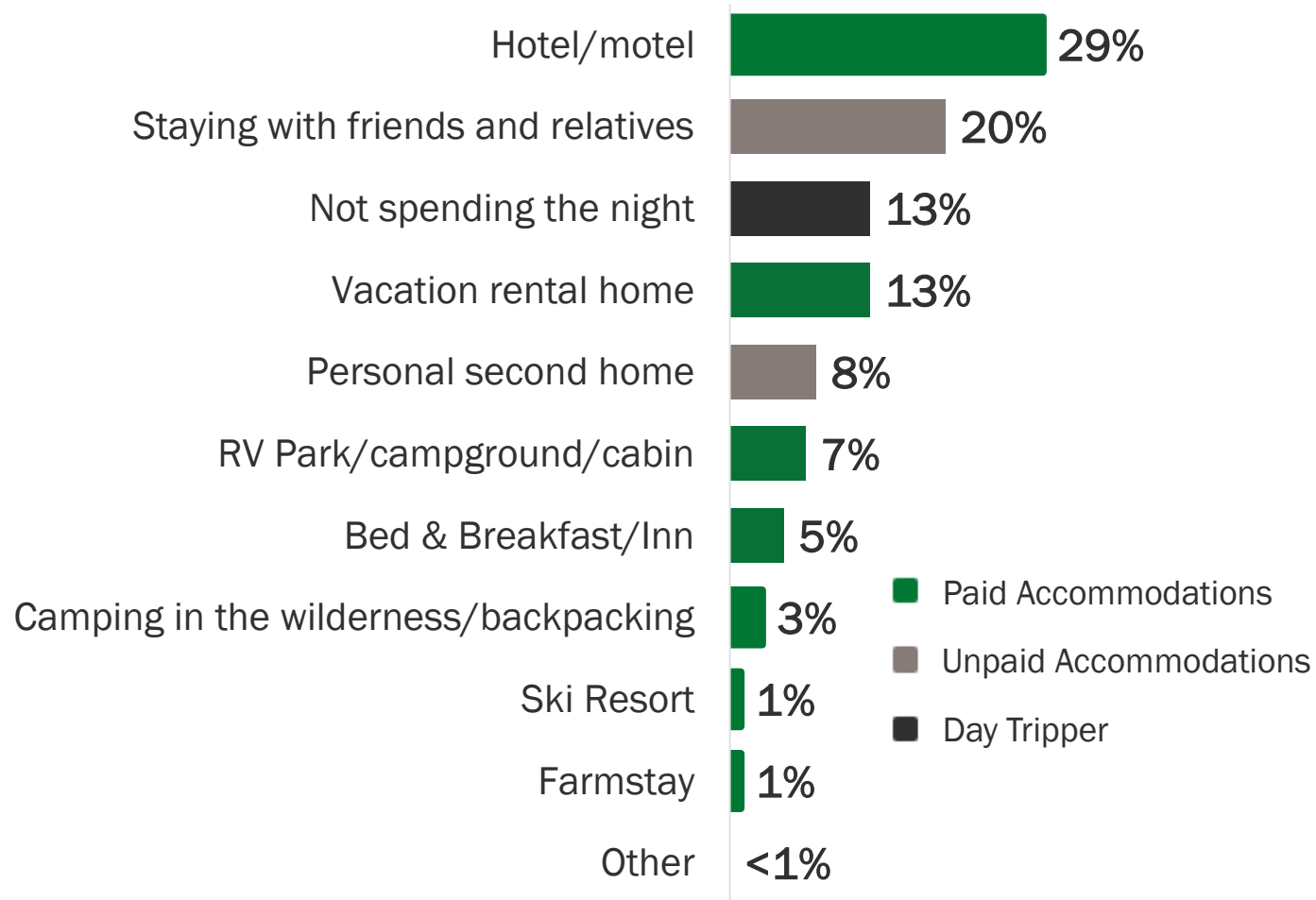


ACCOMMODATIONS¹

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

- » Of those, **49%** stayed overnight in a hotel/motel
- » **22%** stayed in a vacation rental
- » **17%** stayed at a campground, RV park, or in the wilderness
- » **8%** stayed in a B&B/inn
- » **4%** stayed at a ski resort or farmstay

Another 1 in 3 visitors stayed with friends and family or came to Vermont only for the day.

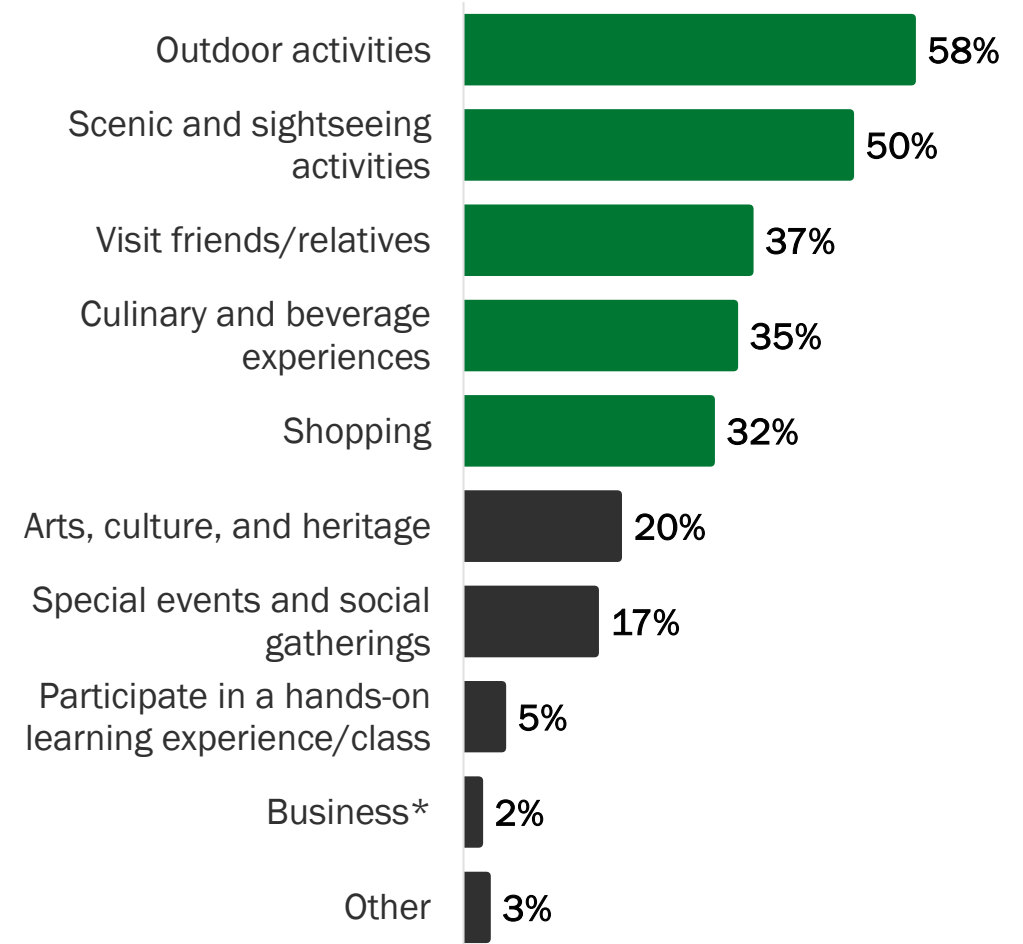


¹ In what type of accommodations are you staying on this trip?

VISITOR ACTIVITIES¹

Vermont's summer visitors enjoy a wide variety of activities, but two stand out: outdoor activities and scenic/sightseeing activities.

- » **Nearly 3 in 5** summer visitors spend time doing **outdoor activities**
- » **Half** of summer visitors enjoy **scenic and sightseeing activities**
- » Another **around 1 in 3** visitors spend time with **friends or family**, enjoy the **state's culinary and beverage experiences**, or spend time **shopping**



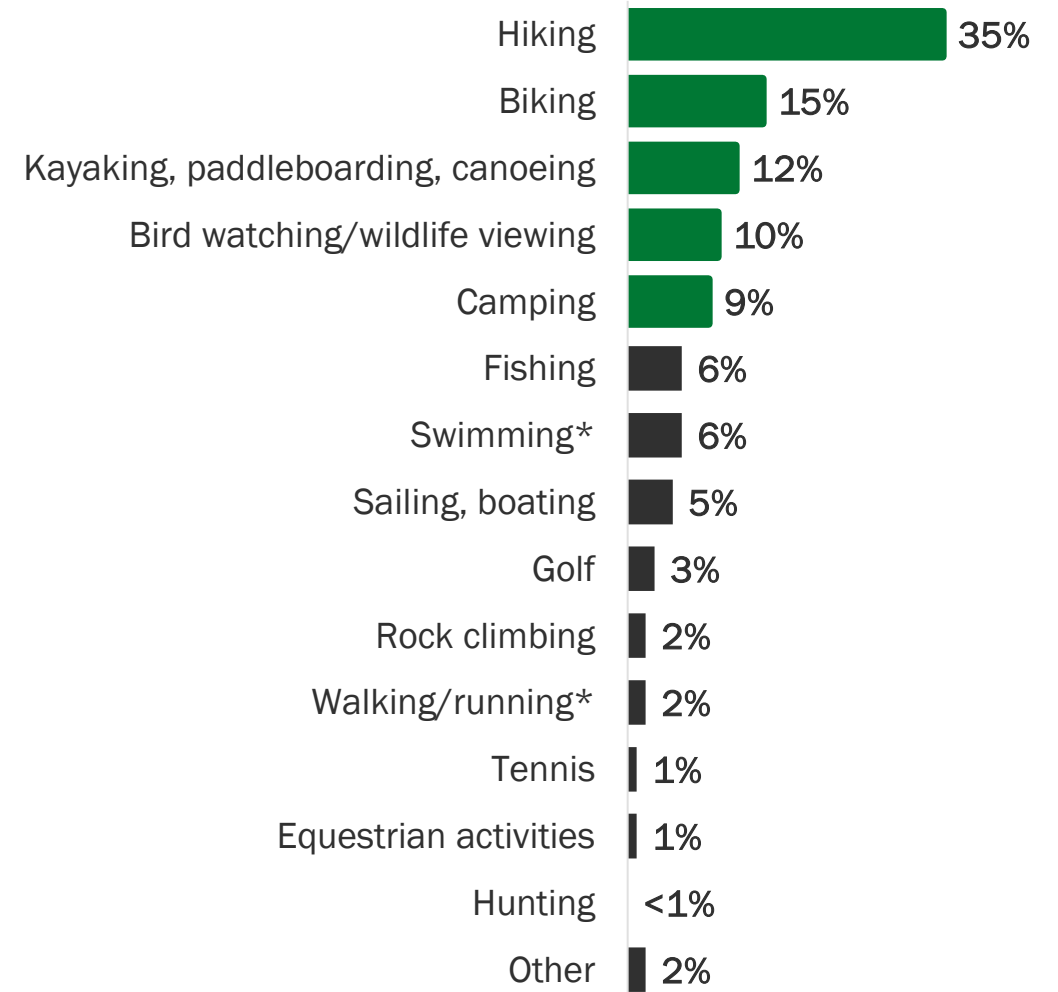
¹ In which of the following activities did/will you participate during this trip? *Multiple responses permitted.*

*Coded from "Other" write-in responses.

OUTDOOR ACTIVITIES¹

Nearly 3 in 5 summer Vermont visitors engaged in outdoor activities while in the state.

- » **Hiking** was by far the most popular outdoor activity, enjoyed by **over 1 in 3** of the state's summer visitors
- » Of those who engaged in outdoor recreation activities, **3 in 4** did **more than one activity**



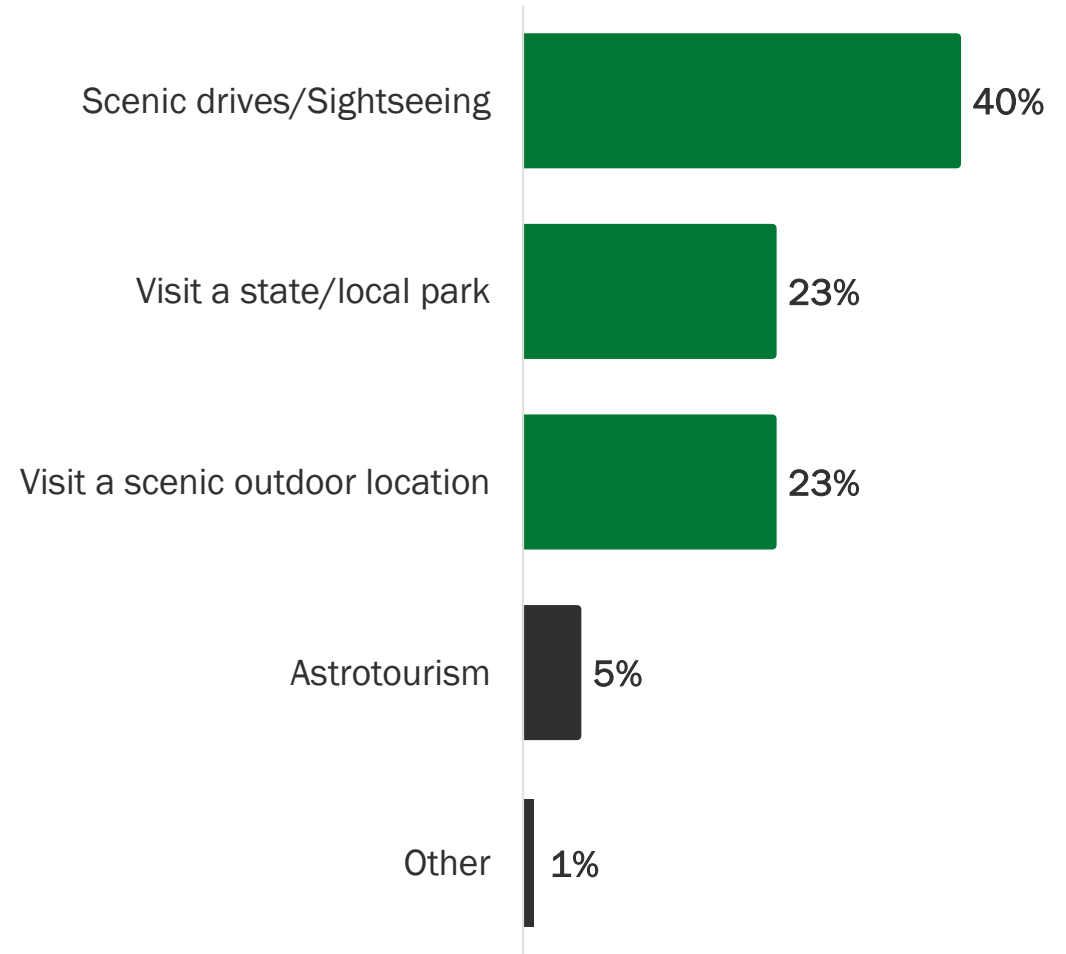
¹ Which of the following outdoor activities did/will you participate in during this trip?
Multiple responses permitted. Percents out of all visitors.

*Coded from "Other" write-in responses

SCENIC & SIGHTSEEING ACTIVITIES¹

Half of summer visitors enjoyed scenic and sightseeing activities while in Vermont.

- » The most popular activity was going on a **scenic drive**, enjoyed by **2 in 5** visitors
- » **Nearly 1 in 4** visited a **scenic outdoor location**, including **state and local parks**

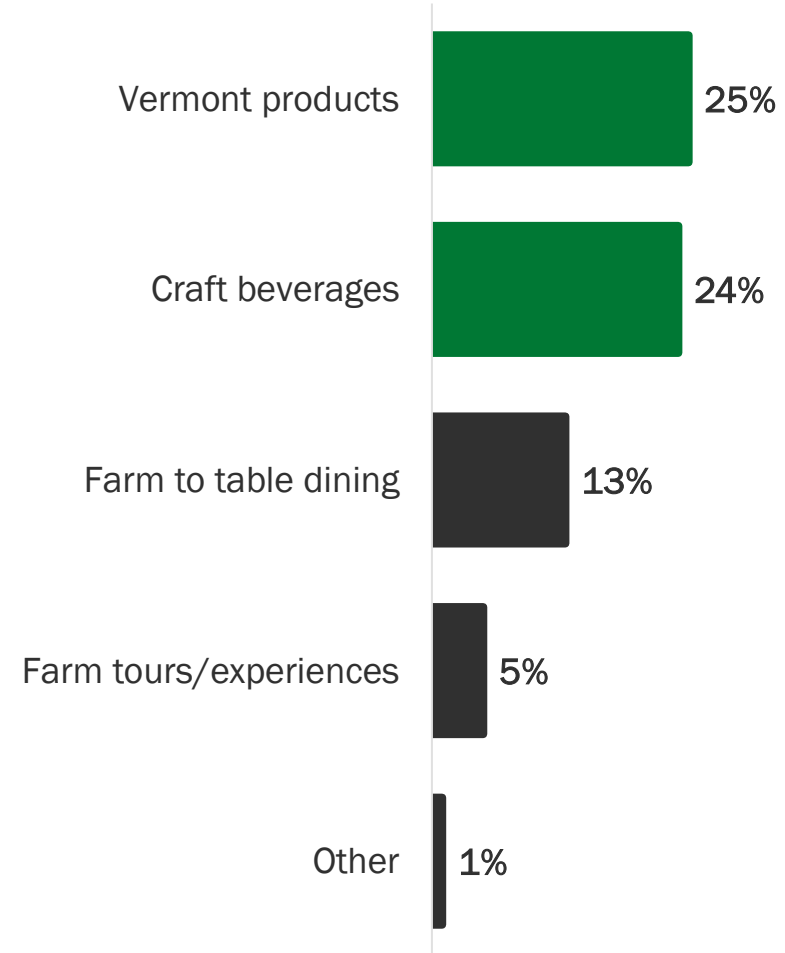


¹ Which of the following scenic and sightseeing activities did/will you participate in during this trip?
Multiple responses permitted. Percents out of all visitors.

FOOD & BEVERAGE ACTIVITIES¹

Wineries, cideries, breweries, distilleries, creameries, and cheese/maple product shops were popular destinations for another over 1 in 3 summer Vermont visitors.

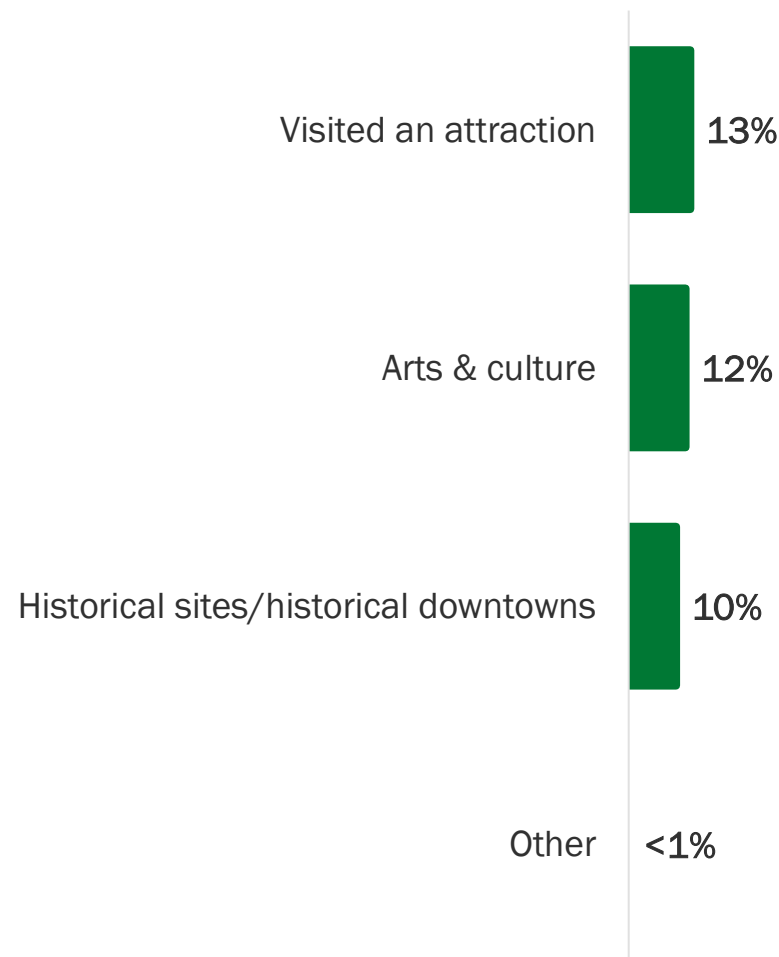
- » **1 in 4** try local **maple, cheese, and cream** products
- » Another **nearly 1 in 4** sample Vermont's **craft beverages**



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

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

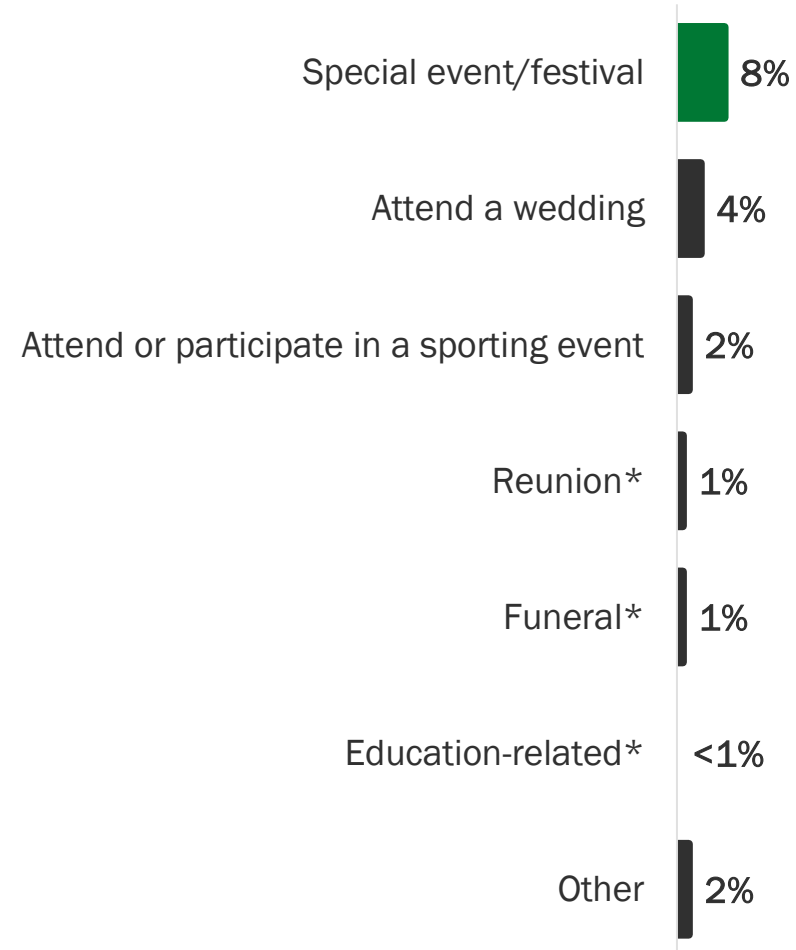


¹ Which of the following arts, culture, and heritage activities did/will you participate in during this trip?
Multiple responses permitted. Percents out of all visitors.

SPECIAL EVENTS¹

17% of summer visitors attended a special event or social gathering while in Vermont.

» Most attended or participated in a **special event/festival**² – **8%** of all visitors



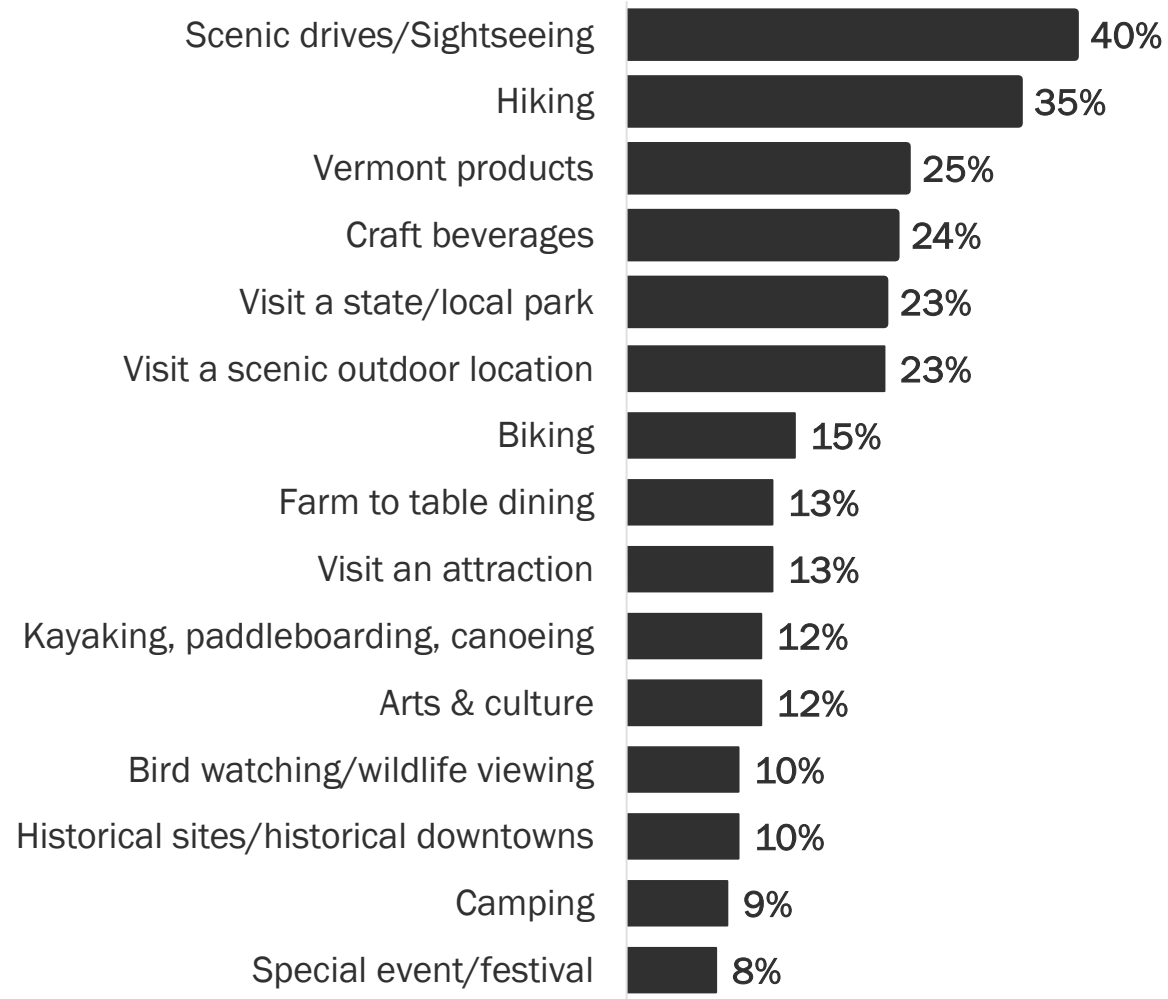
¹ Which of the following special events or social gatherings did/will you participate in during this trip?

Multiple responses permitted. Percents out of all visitors.

² Top events/festivals attended included Fourth of July parades, concerts and music festivals, farmers markets, and carnivals/fairs.

*Coded from "Other" write-in responses.

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

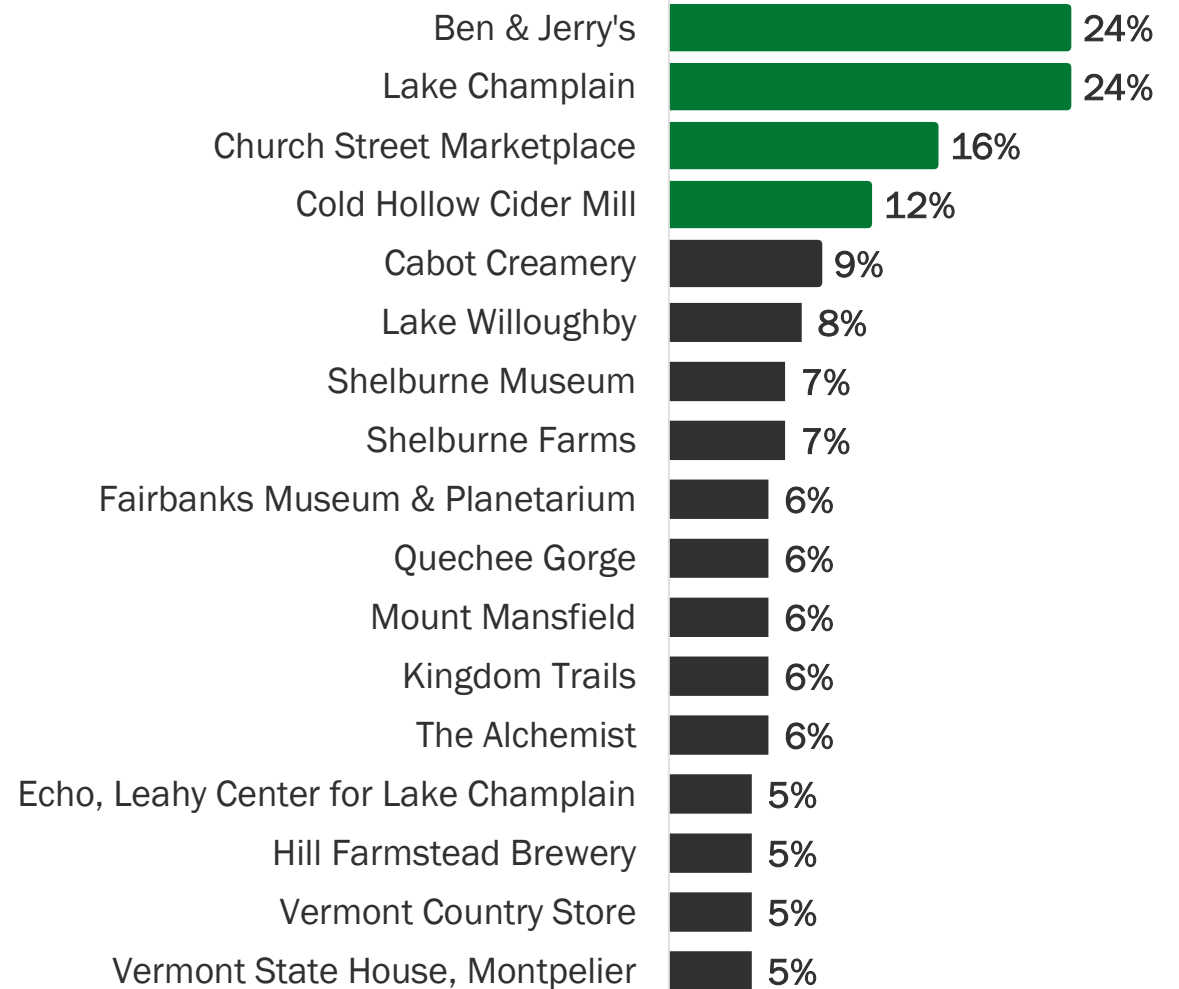
Activity	Percent	Activity	Percent
Scenic drives/Sightseeing	40%	Special event/festival	8%
Hiking	35%	Swimming	6%
Vermont products	25%	Fishing	6%
Craft beverages	24%	Farm tours/experiences	5%
Visit a state/local park	23%	Astrotourism	5%
Visit a scenic outdoor location	23%	Sailing, boating	5%
Biking	15%	Attend a wedding	4%
Farm to table dining	13%	Golf	3%
Visit an attraction	13%	Attend or participate in a sporting event	2%
Kayaking, paddleboarding, canoeing	12%	Rock climbing	2%
Arts & culture	12%	Walking/running	2%
Bird watching/wildlife viewing	10%	Equestrian activities	1%
Historical sites/historical downtowns	10%	Tennis	1%
Camping	9%		

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 summer 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 **over 1 in 4 visitors**
- » Another **around 1 in 7** visited the **Church Street Marketplace** or the **Cold Hollow Cider Mill**



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	24%	Hildene, The Lincoln Family Home	4%
Lake Champlain	24%	Bennington Battle Monument	4%
Church Street Marketplace	16%	Colchester Causeway	4%
Cold Hollow Cider Mill	12%	Morse Farm Maple Sugarworks	4%
Cabot Creamery	9%	King Arthur Baking Co.	4%
Lake Willoughby	8%	Vermont Teddy Bear Factory	4%
Shelburne Museum	7%	Lamoille Valley Rail Trail	3%
Shelburne Farms	7%	Lawson's Finest Liquids	3%
Fairbanks Museum & Planetarium	6%	Marsh-Billings-Rockefeller National Historical Park	2%
Quechee Gorge	6%	Billings Farm	2%
Mount Mansfield	6%	Mount Equinox Skyline Drive	2%
Kingdom Trails	6%	Vermont Institute of Natural science	1%
The Alchemist	6%	Southern Vermont Arts Center	1%
Echo, Leahy Center for Lake Champlain	5%	Barr Hill/Caledonia Spirits	1%
Hill Farmstead Brewery	5%	Montshire Museum of Science	1%
Vermont Country Store	5%	Other ²	9%
Vermont State House, Montpelier	5%	None	28%

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

² Other places visited included the Trapp Family Lodge, Smuggler's Notch Resort, the Bennington Museum, Crystal Lake State Park, and Dog Mountain.

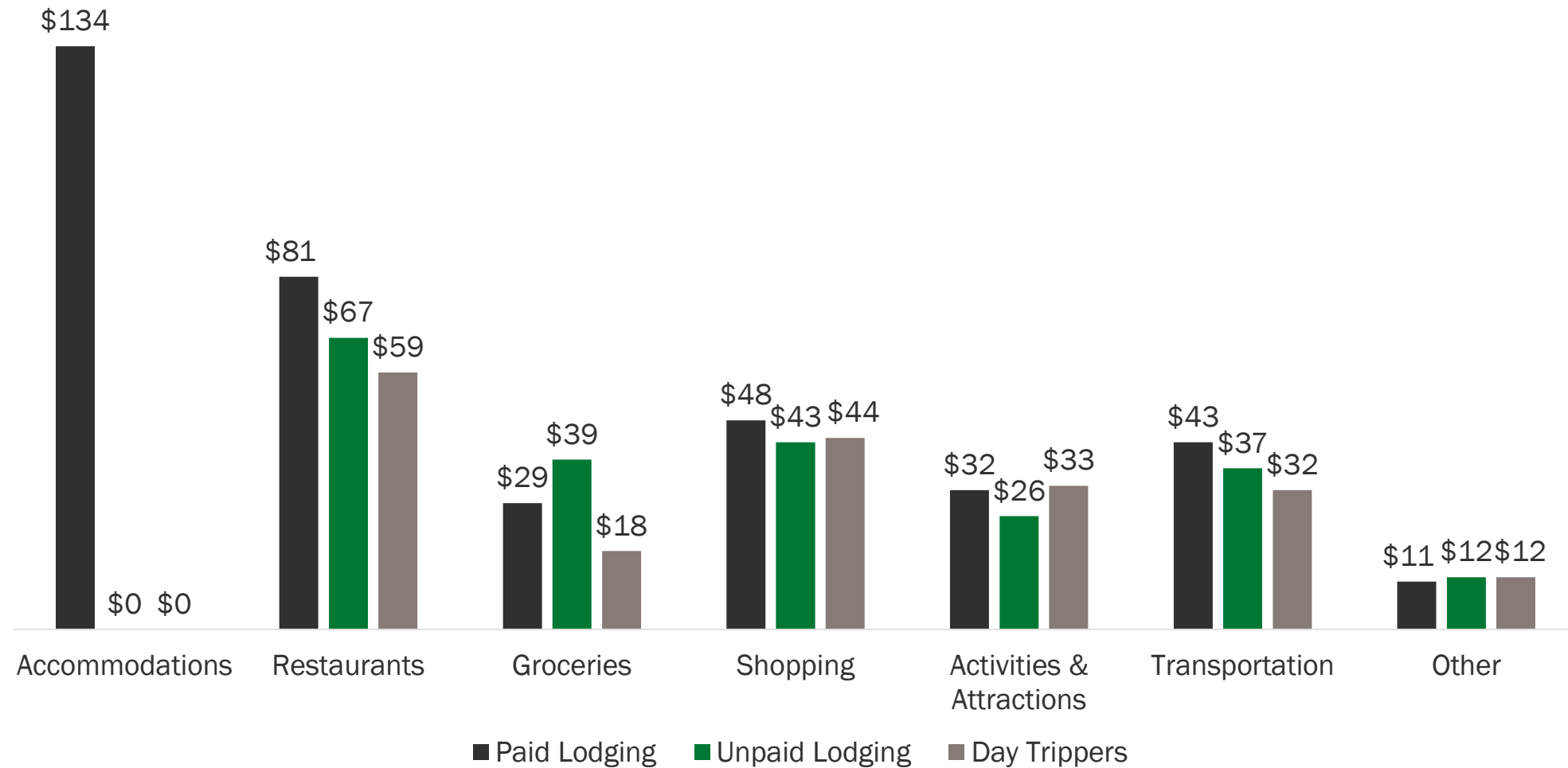
DAILY TRAVEL PARTY SPENDING¹

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

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$134	\$0	\$0
Restaurants	\$81	\$67	\$59
Groceries	\$29	\$39	\$18
Shopping	\$48	\$43	\$44
Activities & attractions	\$32	\$26	\$33
Transportation	\$43	\$37	\$32
Other	\$11	\$12	\$12
Daily Spending	\$378	\$224	\$198

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	\$670	\$0	\$0
Restaurants	\$405	\$302	\$59
Groceries	\$145	\$176	\$18
Shopping	\$240	\$194	\$44
Activities & attractions	\$160	\$117	\$33
Transportation	\$215	\$167	\$32
Other	\$55	\$54	\$12
Trip Spending	\$1,890	\$1,010	\$198

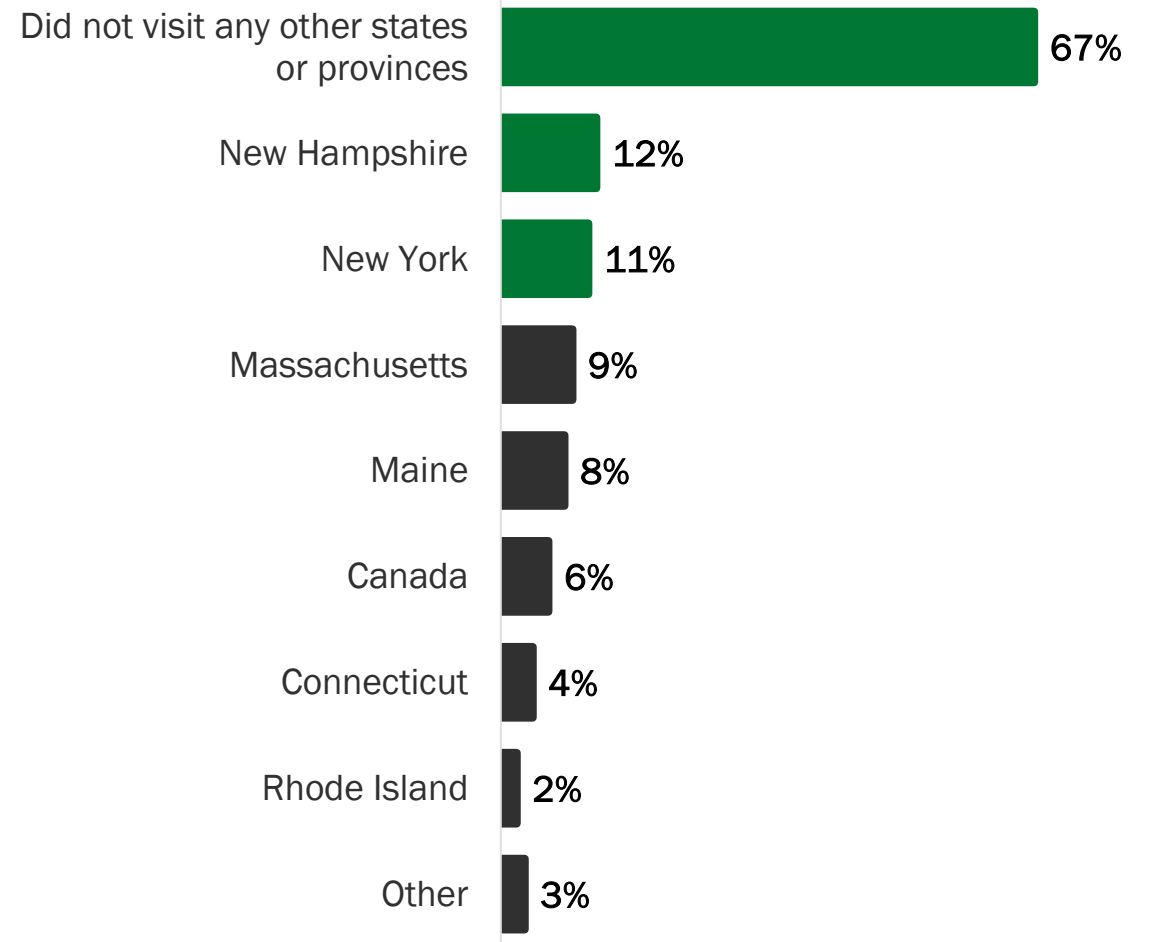
TOTAL TRAVEL PARTY SPENDING (CONT'D)



OTHER STATES & CANADA VISITED¹

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

- » **Over 2 in 3** 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**



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 outdoor landscapes and activities are its crown jewel in the summer, according to its visitors. Whether hiking, biking, or paddling, the most popular place to be is outside. While some challenge themselves on difficult routes, most explore at a leisurely pace, soaking in the scenery around them.

Visitors spend their nights and days largely in the northern part of the state at state parks, lakes, and other recreation areas. But they also spend time indoors, whether it be shopping, perusing a museum, or sampling the state's dairy products.

As one visitor put it, "Vermont is a special place to just 'be'."



VISITOR JOURNEY : POST-TRIP EVALUATION

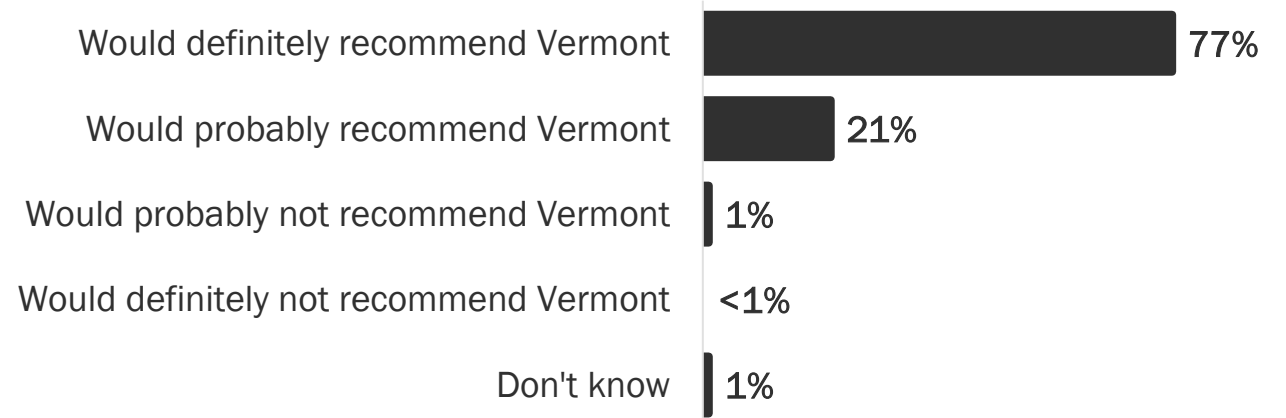


RECOMMENDATION & SATISFACTION

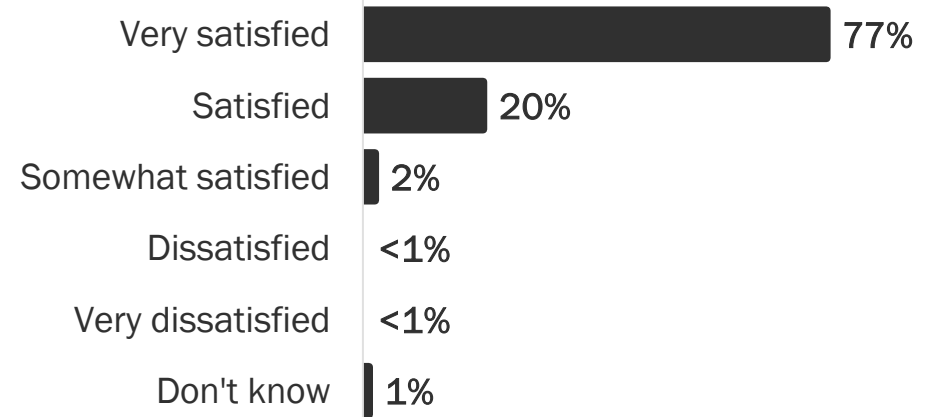
» **98%** of summer visitors **would recommend** that their friends and family choose Vermont as a vacation destination

» **99%** of summer visitors are **satisfied** with their visit to Vermont

Likelihood of Recommending Vermont¹



Satisfaction with Visit²



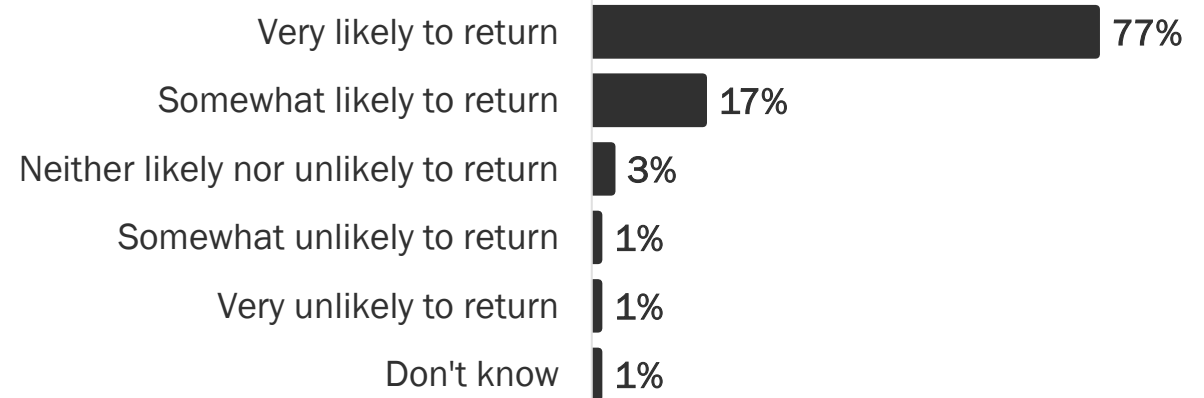
¹ Would you recommend Vermont to friends/family over other vacation areas?

² How satisfied are you with your visit to Vermont?

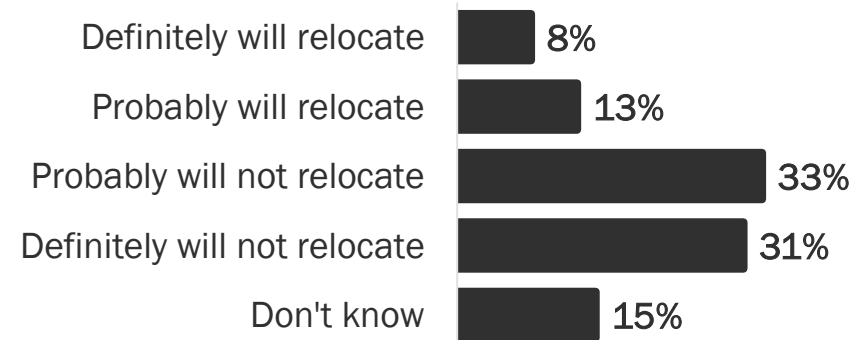
RETURNING & RELOCATING

- » **Over 9 in 10** visitors will **return** to Vermont for a future visit or vacation (**nearly 4 in 5** are very likely to return)
- » **3%** of all visitors are unlikely to return to Vermont for the following reasons:
 1. Too long a drive/too difficult to get there
 2. Prefer a variety of destinations
 3. Safety concerns
 4. Too expensive for what you get
- » **Over 1 in 5** visitors **may relocate** to Vermont (**8%** will definitely relocate)

Likelihood of Returning to Vermont¹



Likelihood of Relocating to Vermont²



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

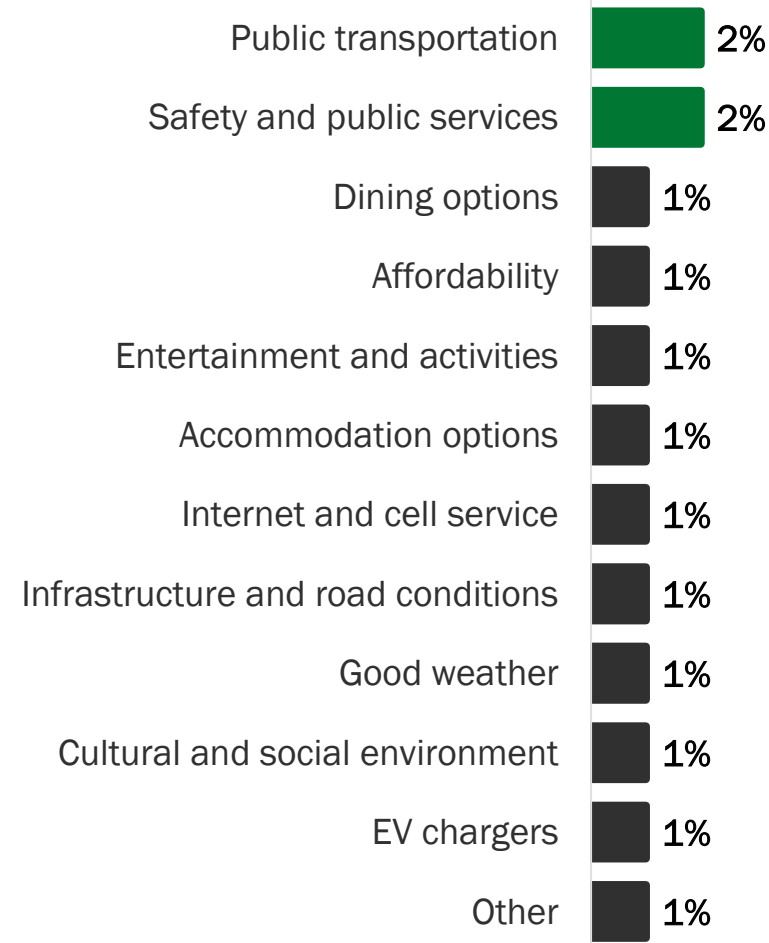
² How likely are you to relocate to Vermont as a resident?

MAKING VERMONT BETTER

Only 13% of summer visitors felt something was missing from their Vermont travel experience.²

- » 2% of all visitors wanted more and better **public transportation** options
- » 2% mentioned **safety concerns** and a desire for better **public services** to address them

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

“We have been to Vermont in every season of the year, and each time it offered something different and amazing.”



“Vermont is truly a Northeastern oasis! Everywhere you look there is art and beauty.”



“Vermont is pure New England charm. Locally-sourced food, creative and friendly locals, and the best maple creemees!”

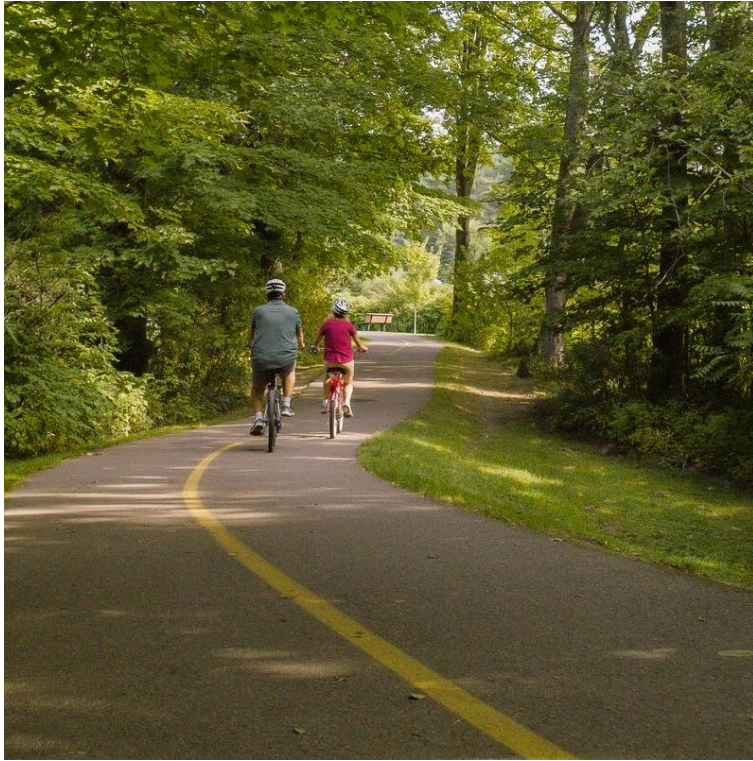


¹ If you were talking to a friend who'd never been here, how would you describe Vermont as a place to visit?

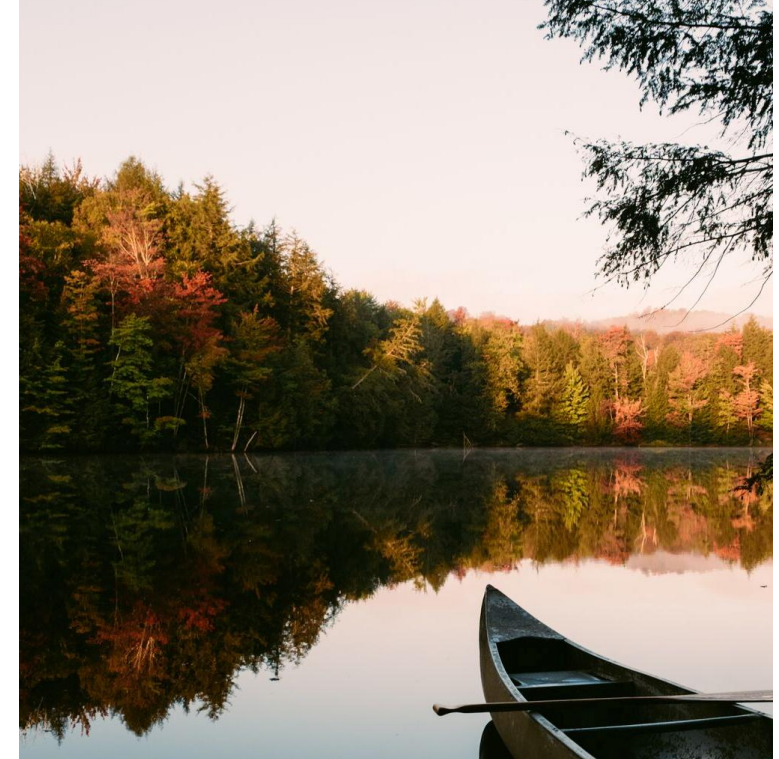
PERCEPTIONS OF VERMONT (CONT'D)¹



“Vermont is like a big green hug, full of great agriculture and great people!”



“Vermont has a charm that inspires the mind and uplifts the spirit. It gives you a sense of wonder and curiosity.”



“The best family vacation you could ask for. Every scene in Vermont feels like a postcard!”



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 gush over Vermont in the summer. They feel happy with their experience, plan to recommend the state to others, and plan to come back – some, to stay! While some mention that various public services could be improved, the majority cannot think of a thing that would make the state a better place to vacation.

When looking back on their time in the state, summer visitors talk about the unique scenery, the friendly people, and most of all, the relaxing environment. While these are all true of Vermont year-round, the summer is a particularly perfect time to soak up the sun, enjoy a maple creemee, and really get out and enjoy everything the state has to offer – not the least of which is the warm welcome given by its residents.

As one visitor put it, “Vermont is a place where seasons change and people don’t.”





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 summer season.



SEASONAL COMPARISONS FINDINGS

Compared to those in other seasons of the year, summer visitors to Vermont:

Pre-Visit

- » Spend the most time planning their trips
- » Are more likely to be in Vermont for outdoor recreation
- » Enjoy a variety of outdoor rec activities, particularly hiking
- » Event visitors most often come to the state for a wedding
- » Choose Vermont for its scenery and relaxing atmosphere

Traveler Profile

- » Are most likely to travel as a family with children
- » Along with winter visitors, have the highest incomes
- » First-time visitors want to explore a new destination
- » Are most likely to be in Vermont for 5 or more nights

Trip Experience

- » Spend their days and nights throughout the state
- » Are more likely to spend the night with friends or family
- » Paid visitors are more likely to stay in campgrounds/cabins
- » Along with winter visitors, are likely to do outdoor activities
- » Are more likely to go hiking during their trips
- » Have average to slightly below average trip spending among overnight visitors; for day trippers, above average

Post-Trip Evaluation

- » Are most satisfied with their trips and most likely to recommend Vermont as a vacation destination



REGIONAL COMPARISONS

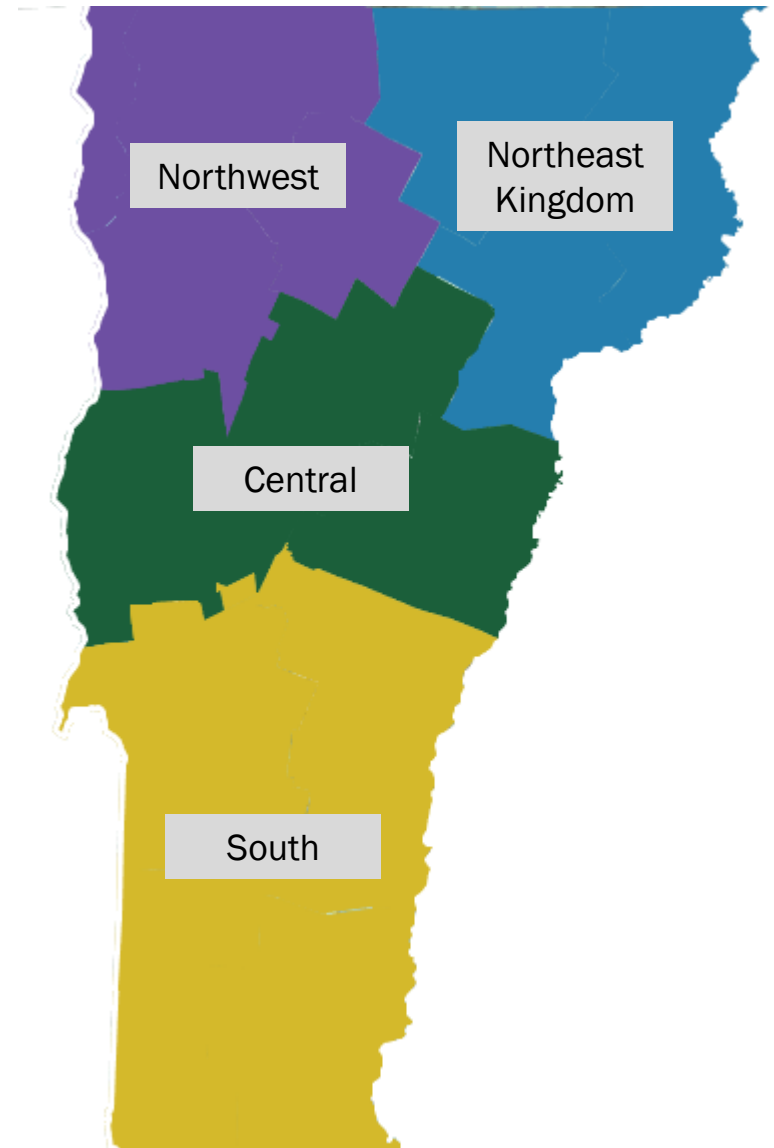
INTRODUCTION: REGIONAL COMPARISONS

REGIONAL COMPARISONS: SUMMER VISITORS

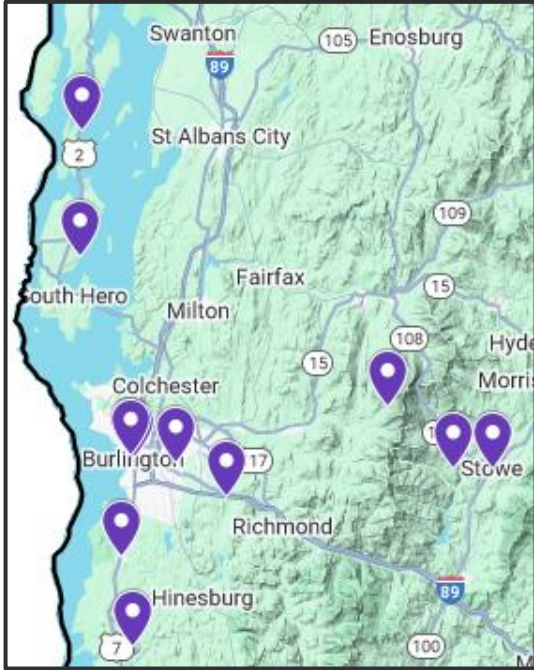
This section looks at how summer visitor traits and behavior differ across Vermont's four broad geographic regions. Understanding these regional patterns helps identify what drives demand in each part of the state and where opportunities exist to better tailor marketing, experiences, and investments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



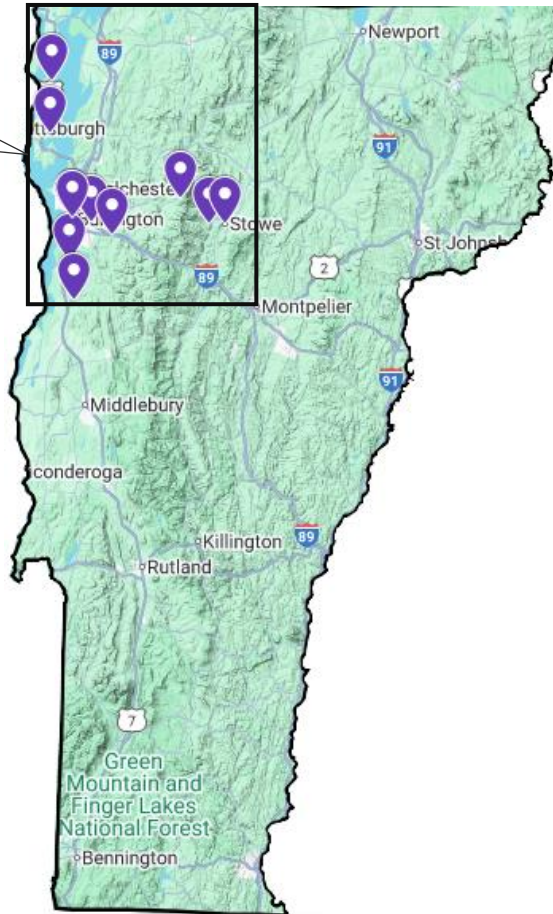
NORTHWEST SURVEY LOCATION MAP



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

Northwest Survey Sites

- Church Street Market
- Burlington Airport
- Trapp Family Lodge
- Grand Isle State Park
- Underhill State Park
- Burlington Waterfront
- Hero's Welcome
- Shelburne Museum
- Mt. Philo State Park
- Downtown Stowe
- Hotel Vermont
- Williston Welcome Center



NORTHWEST*

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

Pre-Visit

- » Spend more time on hotel and airline websites while planning their trip
- » Are less often leisure visitors and more often traveling for business
- » Are more likely to choose Vermont over other destinations for its opportunities for new experiences
- » Leisure visitors are more often in the state to sample local food; outdoor rec visitors, for hiking and sailing

Traveler Profile

- » Are more likely to be traveling from the South and less likely from New England
- » Travel in the largest parties, have a higher income on average, and are most likely to be first-time visitors

Trip Experience

- » Are more likely to stay 5 or more nights in Vermont and to stay in hotels
- » Are more likely to spend time outdoors, sampling Vermont's food and drinks, sightseeing, shopping, and going to events
- » Have average daily spending

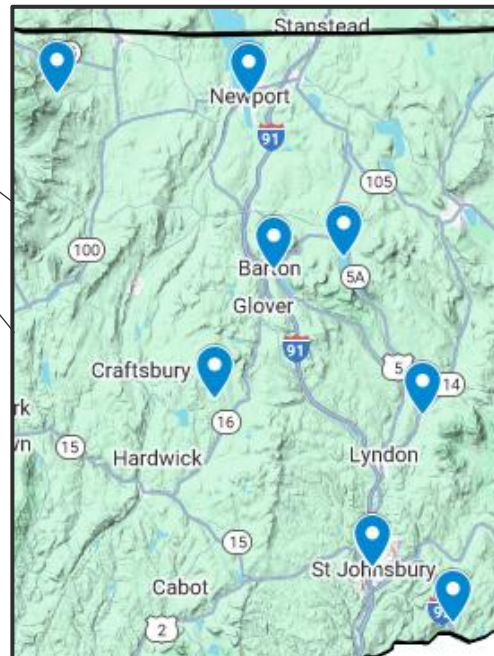
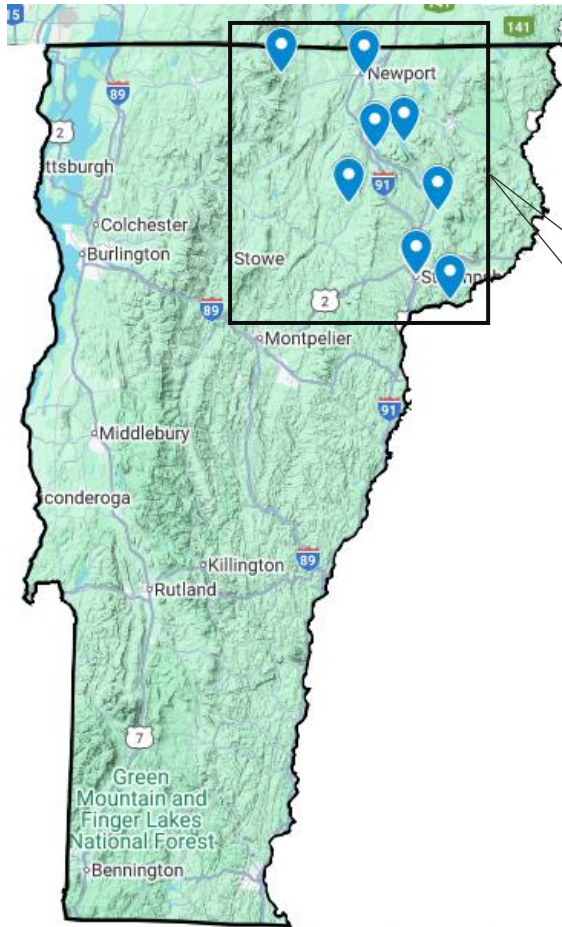
Post-Trip Evaluation

- » 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

- Hill Farmstead Brewery
- Lake Willoughby
- Waterford Welcome Center
- Crystal Lake State Park
- Jay Peak Resort
- Kingdom Trails
- Downtown Newport
- Fairbanks Museum & Planetarium

Northeast Kingdom Events

- Summer Dog Party

NORTHEAST KINGDOM*

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

Pre-Visit

- » Rely on the most online sources of information when planning their trips
- » Have a higher share of leisure visitors and fewer visiting friends and family
- » Leisure visitors are in the state more for craft beverages, art galleries/museums, and just to relax
- » Choose Vermont over other destinations more for its events and attractions and based on recommendations

Traveler Profile

- » More often travel from Canada and New England and travel more often with friends
- » Are most racially diverse, youngest, and lower income

Trip Experience

- » Are less likely to be first-time visitors, spend less time in the state, are often day trippers, and have the lowest daily spending on average
- » First-time visitors are drawn in by recommendations, the desire for somewhere new, or are on a states tour
- » Event visitors are more often traveling for a sporting event

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
- Little River State Park
- Waitsfield Shopping Center
- Dakin Farm
- The Middlebury Inn
- Lawson's Finest Liquids
- Waterbury Center State Park
- Chimney Point State Historic Site

Central Events

- Stowe Balloon Festival

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

Pre-Visit

- » Are more likely to be in the state to see friends or family
- » Leisure visitors are more likely to be looking for local food, scenic drives, and unique attractions
- » Have the highest share of wedding guests among event visitors
- » Choose Vermont over other destinations for its scenic beauty

Traveler Profile

- » Are more likely to be traveling as a family and have a higher income on average
- » First-time visitors are drawn to the state by its beauty or for a specific occasion/event

Trip Experience

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

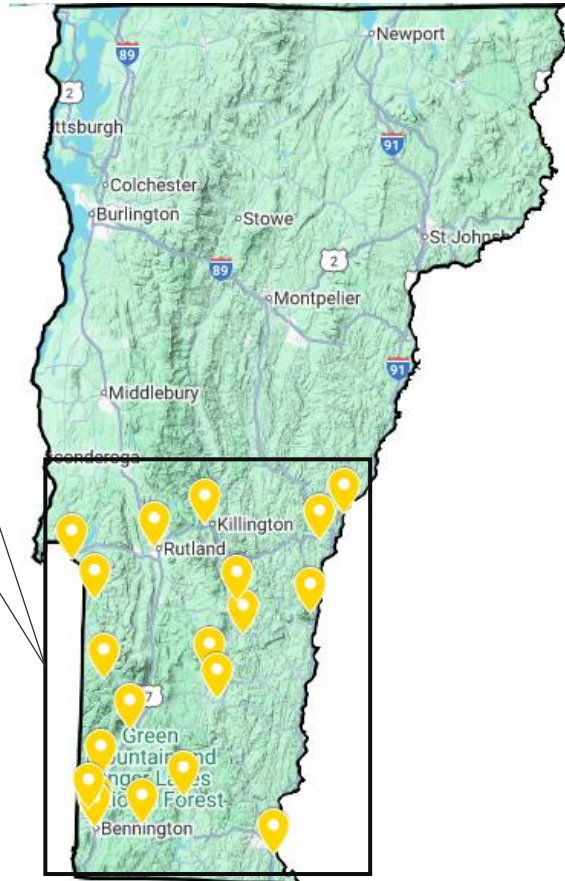
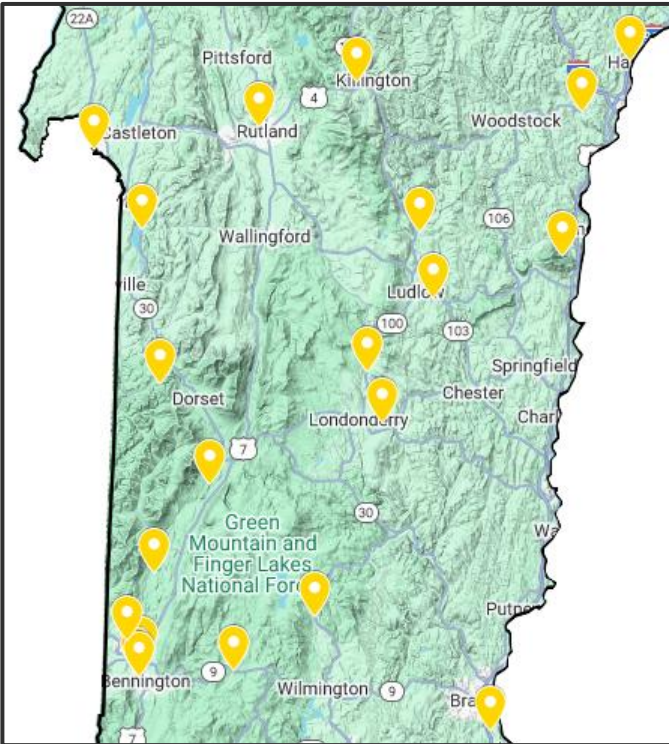
Post-Trip Evaluation

- » 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

- Guilford Welcome Center
- Bennington Welcome Center
- Bennington Museum
- Vermont Country Store
- Hildene
- Fair Haven Welcome Center
- Woodford State Park
- Lake St. Catherine State Park
- Pine Hill Park
- Bennington Battle Monument
- Camp Plymouth State Park
- Merck Forest
- Quechee State Park
- Mt. Ascutney State Park
- Lake Paran
- Lowell Lake State Park
- Lake Shaftsbury State Park
- Gifford Woods State Park
- King Arthur Baking Company

South Events

- Blueberry Fest
- Best of Vermont Summer Fest

Compared to other regions of the state, summer 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
- » Visit Vermont for similar reasons to the average visitor: vacations and seeing friends or family
- » Outdoor rec visitors are more often in the state to go camping and rate their outdoor activities as more relaxing
- » Choose Vermont over other options for practical reasons: proximity and affordability
- » Are less likely to be influenced by advertising to visit

Traveler Profile

- » Are more likely to be traveling from nearby (New England or the Middle Atlantic) and have been to the state many times
- » Have a higher income and are least racially diverse

Trip Experience

- » Often are in the state only for the day; overnight visitors are more likely to be staying in a campground or cabin
- » Participate in fewer activities during their trips and have lower trip spending

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: SUMMER

These clusters reflect how annual personas manifest under summer conditions:
Summer creates more ways for annual clusters to engage with Vermont.

Local Outdoor Regulars

Summer Cluster A:
Low engagement,
repeat visitors

- 45% of summer visitors
- Trips are familiarity-driven, but outdoor activities are popular
- Shorter trips lead to limited engagement

Experience-Driven Explorers

Summer Cluster B:
Outdoor-centric explorers

- 17% of summer visitors
- Leisure visitors with high, varied engagement
- Engage in a mix of camping, hiking, and water activities

Summer Cluster C:
High-engagement explorers

- 10% of summer visitors
- Want to “do it all” – highest variety in activities and regional movement
- Enjoy attractions and food in addition to outdoor recreation

Social & Cultural Visitors

Summer Cluster D:
Active, family-focused

- 17% of summer visitors
- Outdoor recreation is the anchor
- Food and local experiences add depth to the trip
- Long stays allow for deeper, more immersive travel

Summer Cluster E:
Event-focused social visitors

- 11% of summer visitors
- Want to “do it all”
- Multi-region exploration

LOCAL OUTDOOR REGULARS: SUMMER

In the summer, local outdoor regulars:

- » Reflect similarly high repeat visitation and continue to travel as a couple or solo
- » Similarly engage in very few activities overall, reinforcing a low-effort, routine-driven travel style
- » Place even greater emphasis on relaxation alongside outdoor recreation, rather than pursuing a wide range of activities
- » Show a similar pattern of visiting only for the day – less pronounced than in the annual profile, but more pronounced than other summer visitors
- » Tend to stay within a single region, maintaining a contained travel footprint similar to the annual Outdoor Regular pattern
- » Continue to come primarily from nearby and familiar markets, with little change from the annual profile
- » Have a similarly low reliance on trip planning tools, suggesting familiarity with outdoor offerings
- » Show lower advertising recall and influence, consistent with habitual travel behavior
- » Camping and outdoor lodging are more prominent
- » Report trip satisfaction similar to that of annual Outdoor Regulars, though lower than other summer visitors

Key Takeaway: In summer, local outdoor regulars become more relaxed and routine-driven.

EXPERIENCE-DRIVEN EXPLORERS: SUMMER

In the summer, experience-driven explorers with an outdoor focus:

- » Are less likely to travel as a couple and more likely to travel as a family with children
- » Remain strongly motivated by leisure travel, consistent with the annual Explorer profile, but with a stronger emphasis on a variety of outdoor activities, though outdoor activities tend to be more relaxing
- » Travel across regions at a level slightly more contained than the annual Explorer norm
- » Have higher repeat visitation, highlighting the prevalence of outdoor-driven return trips to Vermont
- » Use planning resources less intensively, reflecting familiarity with outdoor offerings
- » Demonstrate lower advertising recall and influence than the annual Explorer baseline
- » Are significantly more likely to come from nearby, particularly New England, and less likely to come up from the South
- » Are more likely to use camping or outdoor-oriented accommodations, with similarly low day-tripping
- » Report high satisfaction, consistent with Explorer expectations

Key Takeaway: Summer amplifies the outdoor side of Experience-Driven Explorers.

EXPERIENCE-DRIVEN EXPLORERS: SUMMER (CONT'D)

In the summer, experience-driven explorers with a do-it-all focus:

- » Are less likely to travel as a couple and more likely to travel as a family with children
- » Show an even stronger leisure-driven motivation than they do across the year overall
- » Are less motivated by relaxation and want to experience a wider range of activities, particularly culture, attractions, and food
- » Are more likely to spend time on cultural activities, sightseeing, and shopping in particular, with a lighter focus on outdoor activities
- » Are more likely to travel across multiple regions than the annual Explorer baseline, reflecting peak-season flexibility
- » Use planning resources more intensively, actively building full itineraries
- » Demonstrate similar advertising recall and influence to annual Explorers
- » Come from a broader mix of origin regions and markets, particularly the South and Midwest
- » Include a higher share of first-time and early-repeat visitors, reflecting even more discovery-oriented travel
- » Are more likely to stay in paid accommodations, particularly hotels/resorts, but have similarly minimal day-tripping
- » Report very high satisfaction, matching annual Explorer levels

Key Takeaway: Summer enables Explorers to combine even more experiences into a single trip.

SOCIAL & CULTURAL VISITORS: SUMMER

In the summer, active, family-focused social and cultural visitors:

- » Tend to travel as a couple or solo, similar to annual Social & Cultural visitors
- » Have a continued focus on time with friends and family but also have leisure as a dual trip purpose
- » Engage in more activities than the annual Social & Cultural baseline, using Vermont as a setting for shared family experiences
- » Spend particular time on culinary experiences, sightseeing, and slightly more adventurous outdoor activity, especially hiking and biking
- » Are more likely to travel across multiple regions of the state
- » Rely slightly less on friends and family for planning, with some added use of practical planning tools
- » Show similar advertising recall, with weaker influence on visitation during summer
- » Come from similar origin regions and markets as annual Social & Cultural visitors, with slightly more traveling up from the South
- » Reflect even higher repeat visitation
- » Rely more heavily on personal or friend/family accommodations, with fewer day trips than in the annual persona
- » Report higher satisfaction than the annual Social & Cultural average, reflecting successful family time and shared activities

Key Takeaway: In summer, Social & Cultural Visitors actively experience Vermont with the people they came to see.

SOCIAL & CULTURAL VISITORS: SUMMER (CONT'D)

In the summer, event- and occasion-focused social and cultural visitors:

- » Are more likely to visit for special events and occasions, particularly weddings, and less for leisure
- » Have a greater tendency to travel solo compared to annual Social & Cultural visitors
- » At the same time, continue to be motivated to visit by the promise of time with friends and family
- » Organize activities around the event itself, with dining, sightseeing, and adventurous outdoor activities (particularly hiking) filling in
- » Maintain a contained travel footprint shaped by event location, similar to annual Social & Cultural Visitors
- » Continue to rely on advice from friends and relatives when planning their trips
- » Show advertising recall comparable to the annual profile, with more limited influence on decision-making
- » Draw from similar origin markets as annual Social & Cultural Visitors, with some broader reach into the South
- » Include a similar mix of repeat and early-repeat visitors
- » Continue to rely on friends, family, or personal accommodations more so than paid lodging and are less likely to be day trippers
- » Report higher satisfaction, reflecting positive event-driven experiences

Key Takeaway: Summer strengthens the special occasion-driven side of Social & Cultural travel.

VERMONT TOURISM

Summer 2025 Visitor Tracking Report

June 1 – August 31, 2025

Downs & St. Germain Research
850-906-3111 | contact@dsg-research.com
dsg-research.com