

VERMONT TOURISM

Winter 2024-2025 Visitor Tracking Report

November 30, 2024 – March 31, 2025

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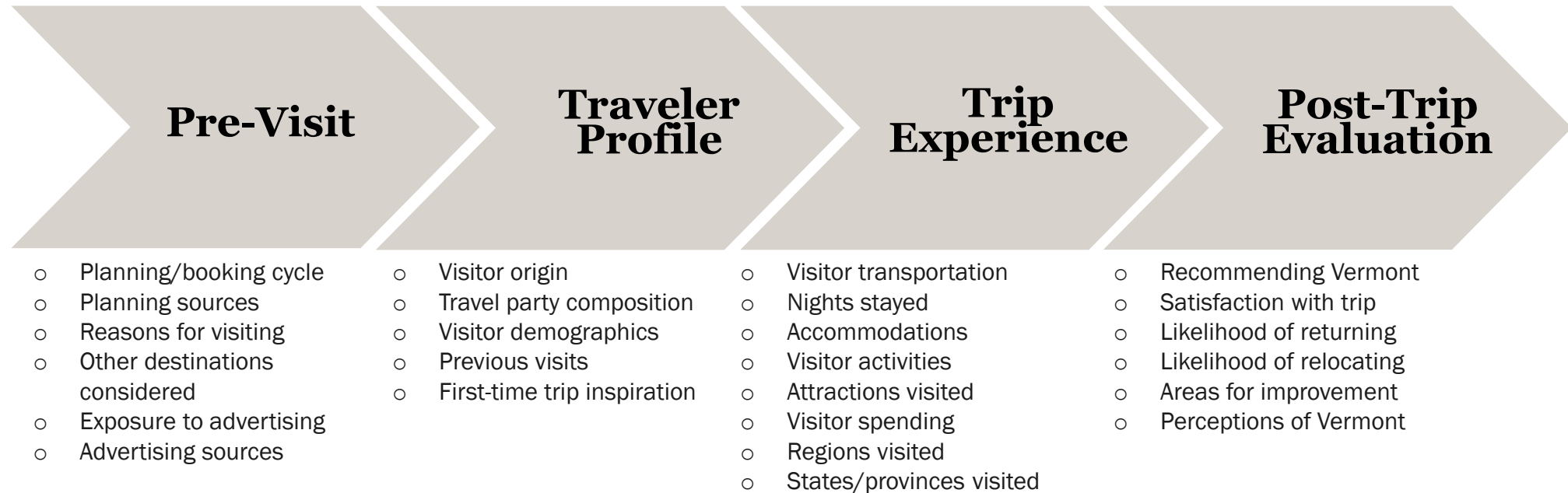
STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to Vermont from November 30, 2024 – March 31, 2025.

It represents months 3 through 6 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 – WINTER 2024

Pre-Visit

- » Winter visitors consult **few sources of information** when **planning their trips** to Vermont
- » They largely come to the state for one reason: **outdoor recreation**, particularly **skiing**
- » Vermont's **outdoor activities** are also what convinces visitors to **choose the state over others**

Traveler Profile

- » Vermont's winter visitors most commonly travel from **New England** or the **Middle Atlantic** and travel **as a couple**
- » Visitors tend to **return to Vermont** in the winter year after year

Trip Experience

- » Winter visitors gravitate toward the mountainous regions of Vermont, such as the **Stone and Okemo Valleys**
- » They mainly spend their time enjoying **outdoor activities**
- » They also tend **not to visit other states** on their trip

Post-Trip Evaluation

- » In describing Vermont, visitors emphasize its **outdoor activities** for thrill-seekers, but also its **quiet, unhurried nature**
- » Most visitors are **satisfied** and would **recommend** Vermont to friends and family

STUDY METHODS



METHODS OVERVIEW

VISITOR TRACKING

1,652 interviews were completed with visitors to the state of Vermont online and in person at local attractions, ski resorts, visitor centers, food and drink establishments, shops, downtown areas, and events between November 30th, 2024 and March 31st, 2025.



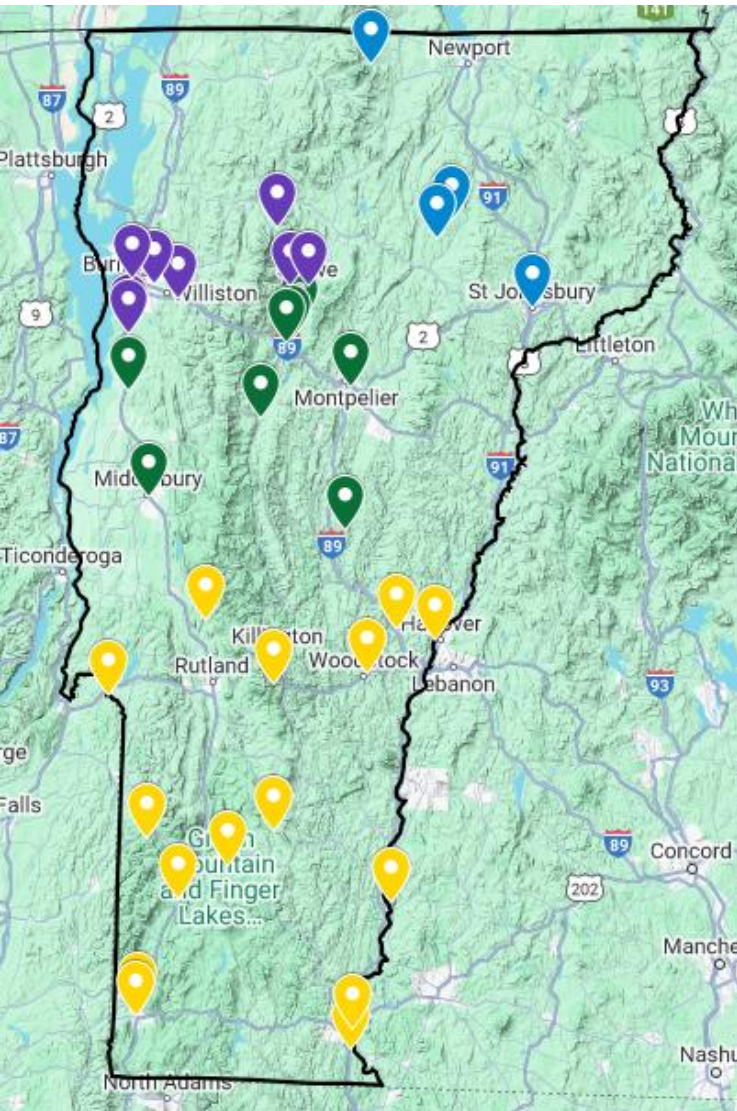
SURVEY SOURCES

Region	Responses	Percent
Northeast Kingdom	404	24%
Northwest	423	26%
Central	392	24%
South	433	26%
Total	1,652	100%

Survey Source	Responses	Percent
Intercept Interview	1,460	88%
Social Media	141	9%
QR Code	51	3%
Total	1,652	100%

Survey Source Breakdown	Responses	Percent
Intercept Interview	1,460	88%
Ski Resort	311	19%
Visitor Center	245	15%
Craft Beverages, Food & Farmers Markets	172	11%
Hotel	180	10%
Attraction or Store	155	10%
Downtown	161	9%
Event	128	8%
Museum/Arts & Culture	63	4%
Airport	42	3%
Outdoor Rec	1	<1%
Social Media	141	9%
QR Code	51	3%
Total	1,652	100%

INTERCEPT SURVEY LOCATION MAP



Northeast Kingdom Survey Sites

- Hill Farmstead Brewery
- Fairbanks Museum & Planetarium
- Jay Peak Resort
- Highland Center for the Arts

Northwest Survey Sites

- Church Street Market
- Burlington Airport
- Williston North Welcome Center
- Vermont Teddy Bear Factory
- Trapp Family Lodge
- Downtown Stowe
- Shelburne Museum
- Smugglers' Notch Resort

Central Survey Sites

- Ben & Jerry's
- Cold Hollow Cider Mill
- Barr Hill Distillery
- Waitsfield Shopping Center
- Dakin Farm
- The Middlebury Inn

South Survey Sites

- Sharon Welcome Center
- Fair Haven Welcome Center
- Guilford Welcome Center
- Bennington Welcome Center
- Billings Farm & Museum
- Bennington Museum
- Vermont Country Store Weston
- Vermont Country Store Bellows Falls
- King Arthur Baking Company
- Downtown Brattleboro
- Killington Resort
- Bromley Mountain Resort
- Hildene
- Baird Farm

Events

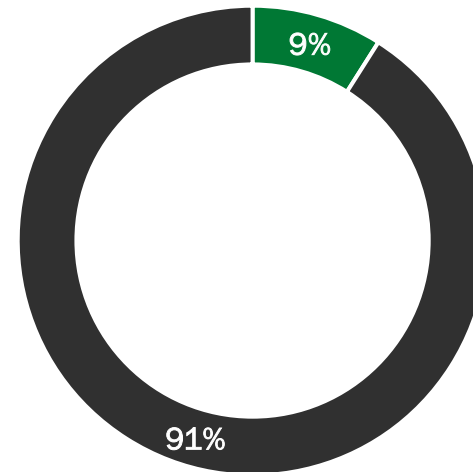
- Highland Center Winter Market
- Highland Center Snowlights
- Highland Center Curds & Curling
- Shelburne Winter Lights
- BTV Winter Market
- Waterbury Winterfest
- Silloway Maple Open House
- Killington Cup
- Baird Farm Maple Open House
- Merck Forest Maple Open House

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
- » **9%** of Vermont's winter visitors **are just passing through** the state on their way to another destination
- » **34%** of visitors encountered at **Vermont Welcome Centers** are just passing through the state

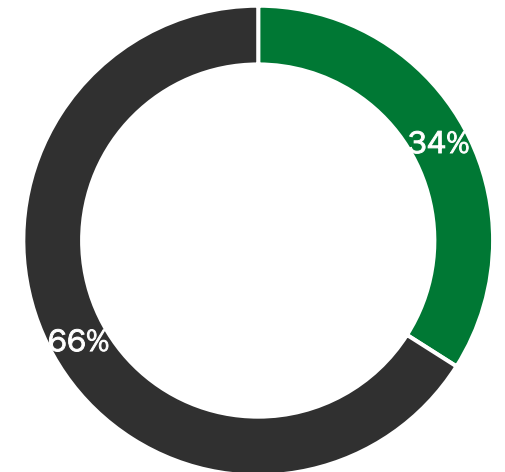
Visitors Only Passing through Vermont

All Visitors Surveyed



- Just passing through
- Not just passing through

Visitors Surveyed at Visitor Centers



- Just passing through
- Not just passing through



DETAILED FINDINGS

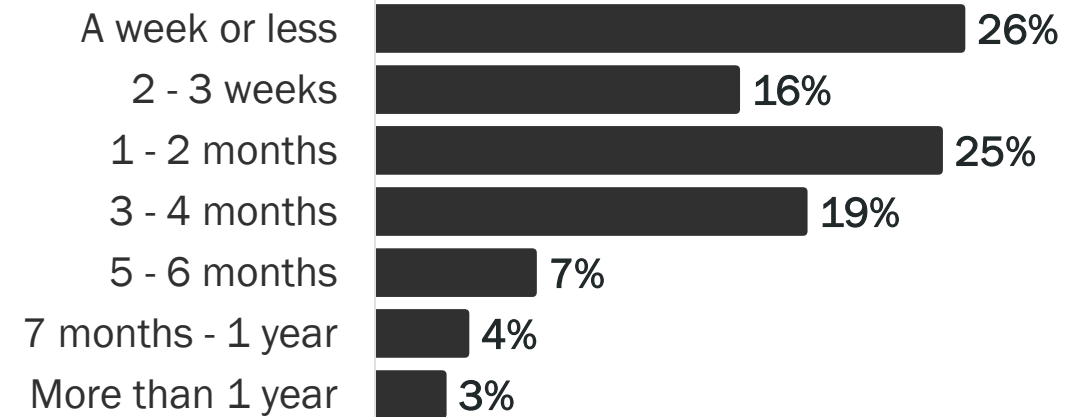
VISITOR JOURNEY: PRE-VISIT



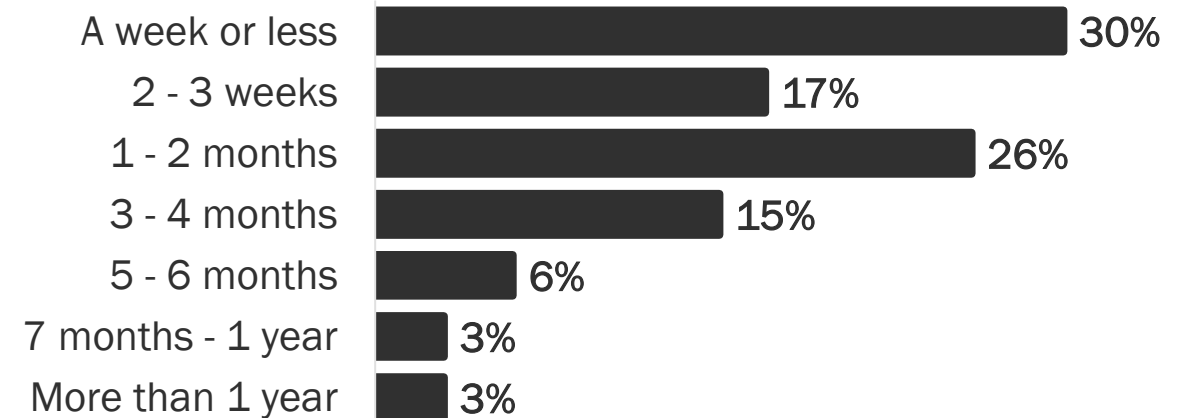
TRIP PLANNING CYCLE

- » Typical winter visitors began planning their trip to Vermont **33 days** in advance
- » **Nearly 7 in 10** visitors started planning their trip 2 months or less in advance
- » Typical visitors booked accommodations or definitively decided to take the trip **25 days** in advance
- » **Nearly 3 in 4** visitors booked their trip 2 months or less in advance

Beginning of Trip Planning Cycle*



Booked Accommodations/Made Trip Decisions**

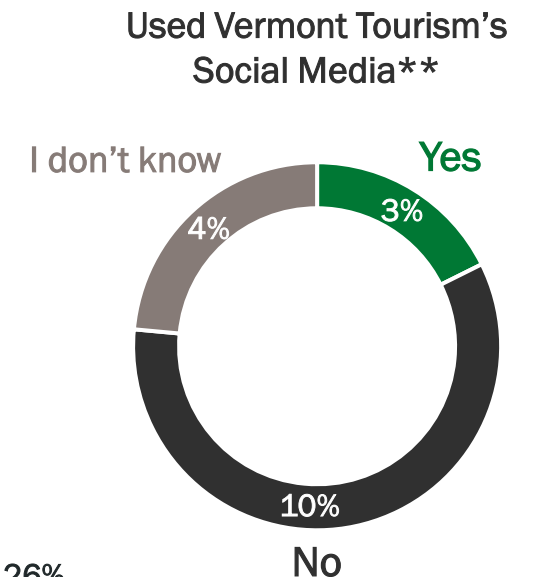
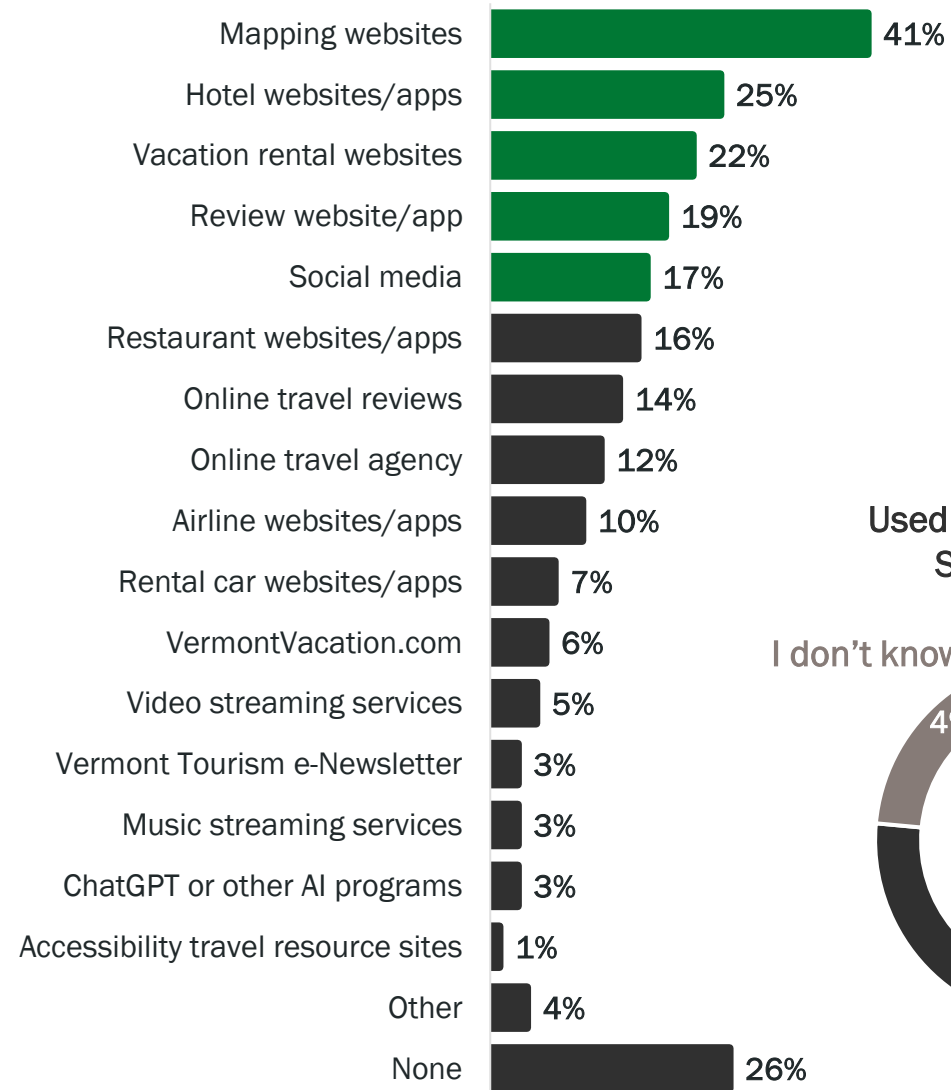


*How far in advance did you start planning this trip?

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

ONLINE TRIP PLANNING SOURCES*

- » **Mapping websites** were the most-used winter trip planning source by a large margin
- » **Hotel websites/apps, vacation rental websites, social media, and review websites/apps** were other popular sources
- » **3%** of winter visitors used Vermont Tourism's social media to help plan their trips

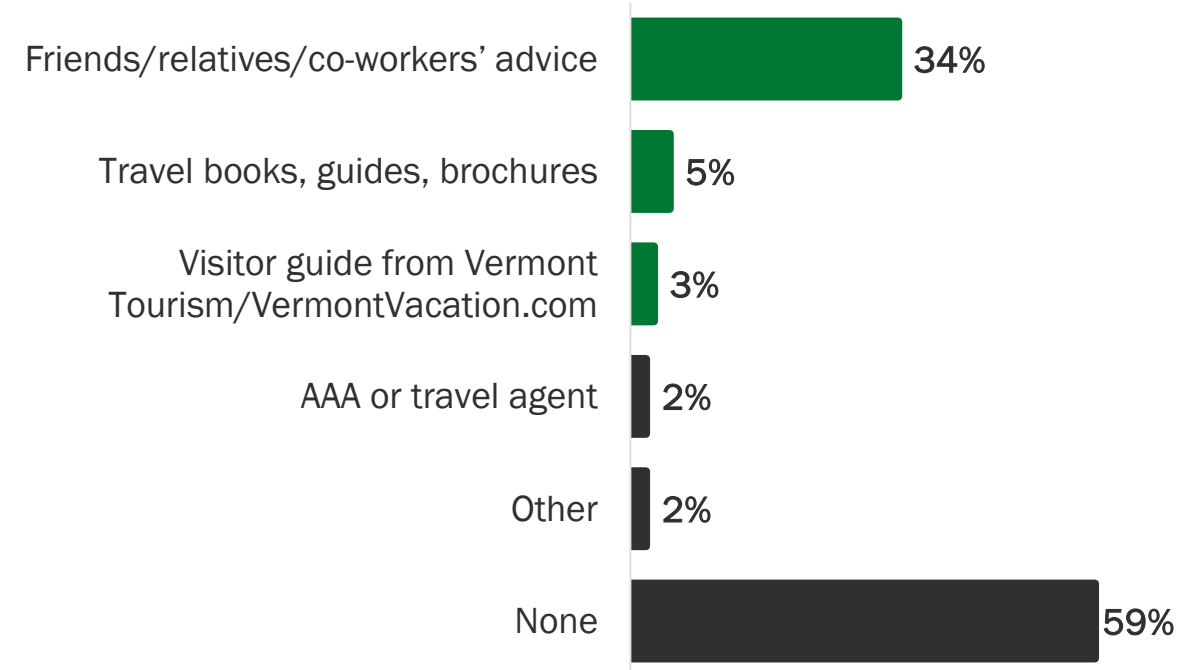


*While planning this trip, which of the following online sources did you use? *Multiple responses permitted.*

**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 SOURCES*

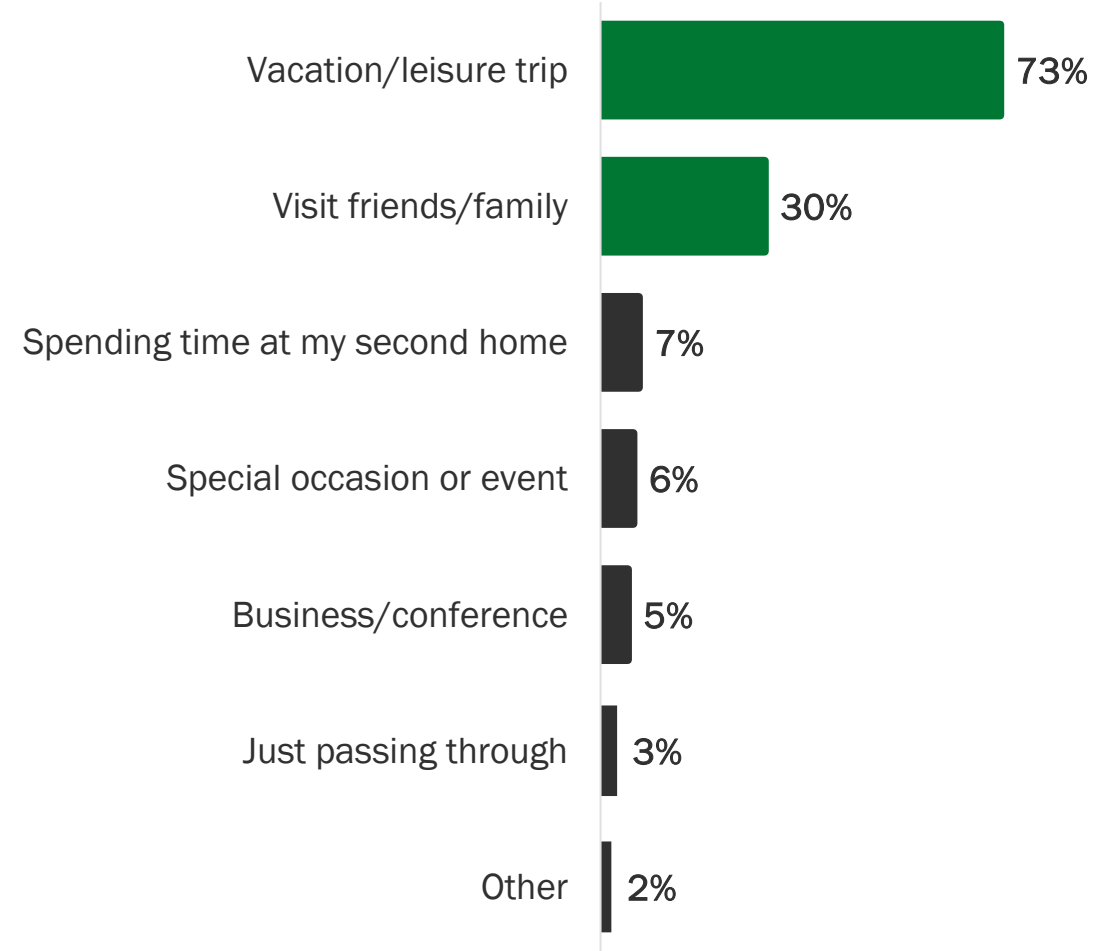
- » **Word of mouth** was the most popular offline trip-planning resource, used by over **1 in 3** visitors
- » **1 in 20** visitors used **travel books, guides, or brochures** to help plan their trip in Vermont
- » **3%** of visitors used **Vermont's Visitor Guide** in their trip planning
- » **Nearly 3 in 5** visitors did not use **any** offline resources to help them plan their trip to Vermont



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

REASONS FOR VISITING*

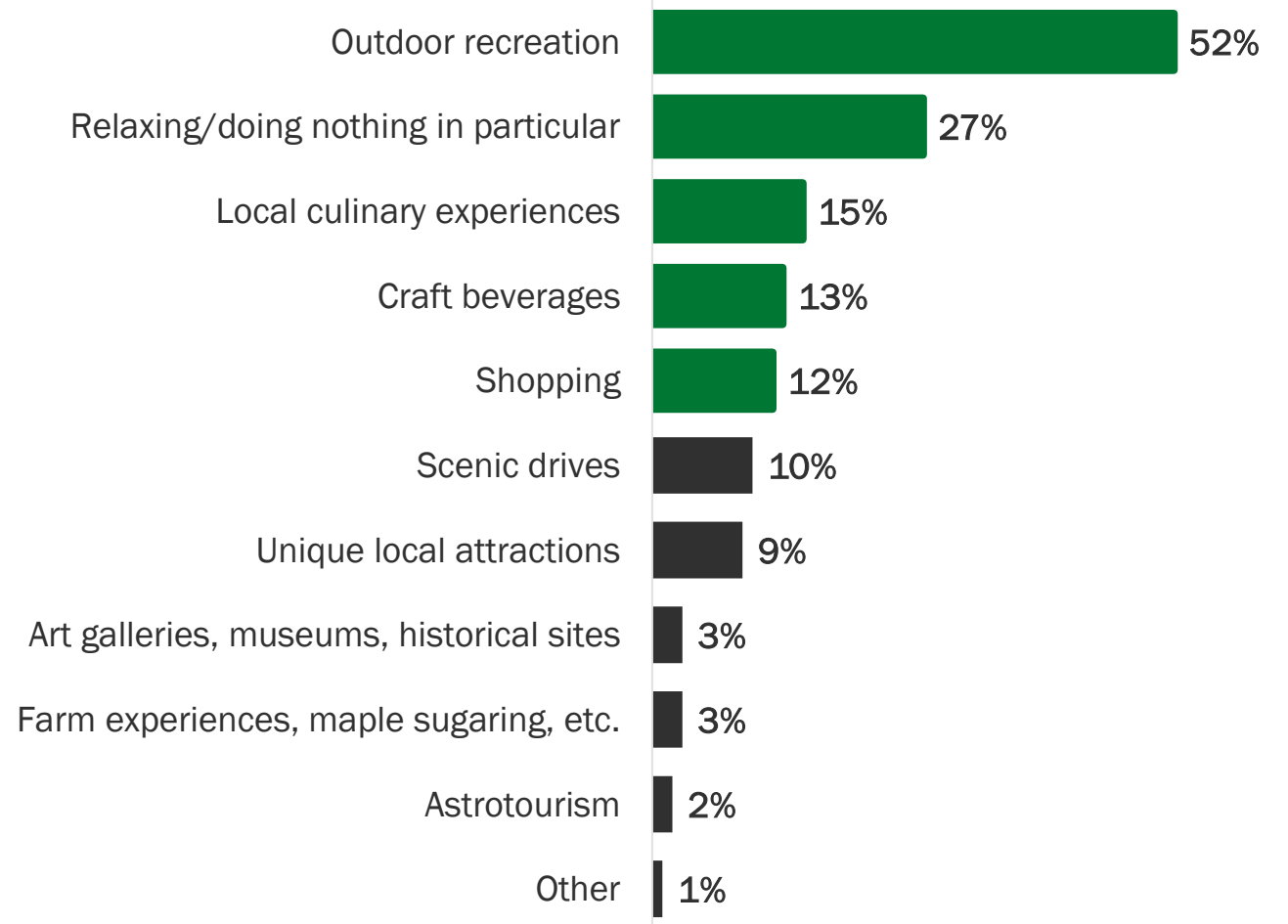
- » Most winter visitors came to Vermont primarily for a **vacation/leisure trip** or to **visit friends and family**



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

TYPE OF LEISURE TRIP*

- » **Over half** of winter visitors come to Vermont to enjoy the outdoors
- » Other visitors came to the state to **relax**, enjoy **local food and beverages**, or go **shopping**

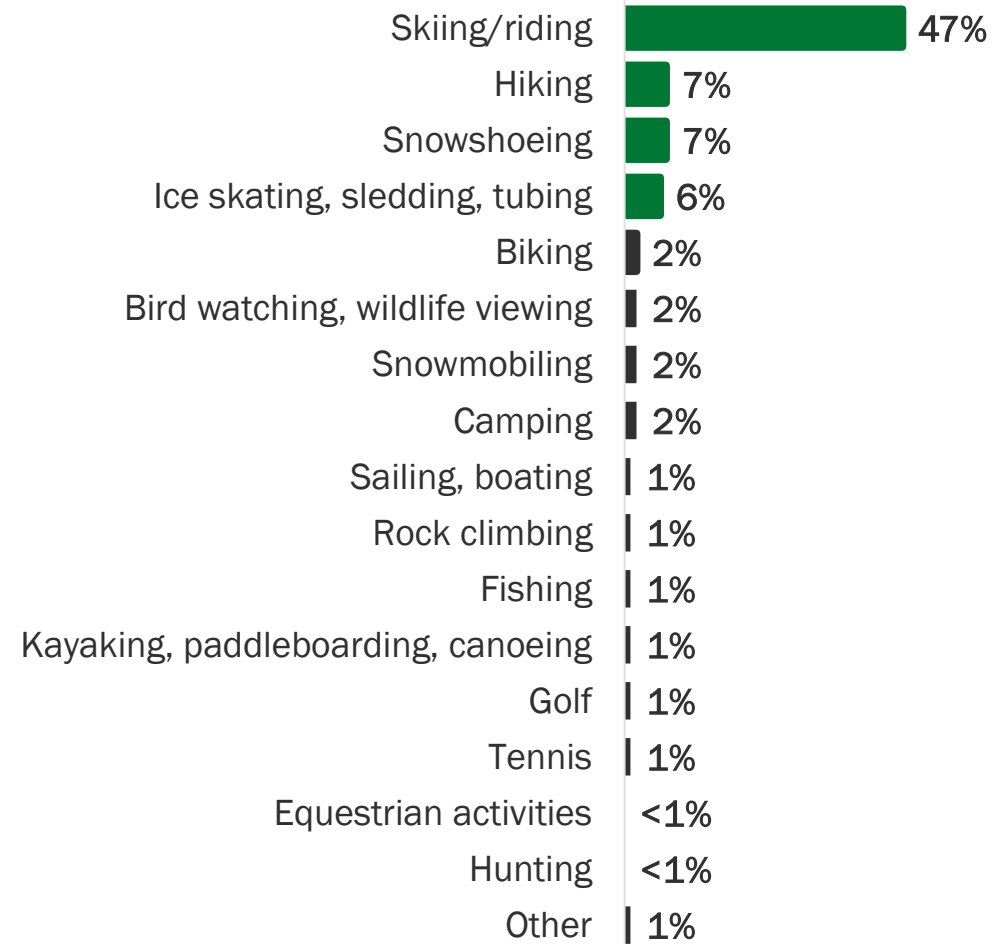


*What type of vacation/leisure trip? Multiple responses permitted. Percents out of all visitors.

TYPE OF OUTDOOR RECREATION*

By far, most of Vermont's winter outdoor recreation visitors come to the state to ski. And many of these don't plan to do any other outdoor activities.

- » **Nearly half** of **all** winter visitors (90% of outdoor rec visitors) come to Vermont to **ski**
- » **33%** of outdoor rec visitors intend to engage in **only one outdoor activity**
- » Only about **1 in 12** visitors come to **hike** or to enjoy **other snow activities** besides skiing



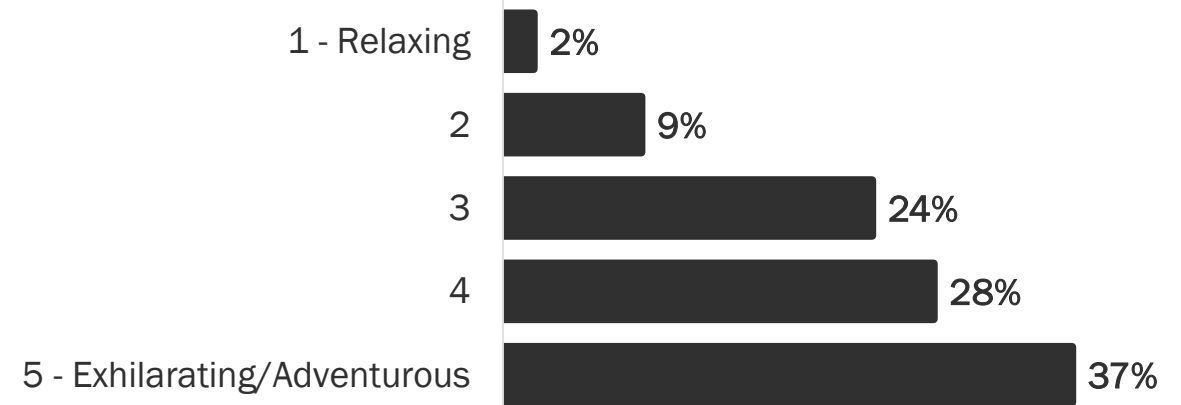
*What type of outdoor recreation? Multiple responses permitted. Percents out of all visitors.

RATING OUTDOOR RECREATION*

52% of winter visitors come to Vermont for outdoor recreation – and these activities skew more adventurous (vs relaxing), likely driven by skiers.

- » Nearly 2 in 3 of these visitors rated their outdoor activities as **exhilarating/adventurous** or just a step below
- » Only 2% rated their outdoor activities as **relaxing**

Outdoor Activity Ratings:

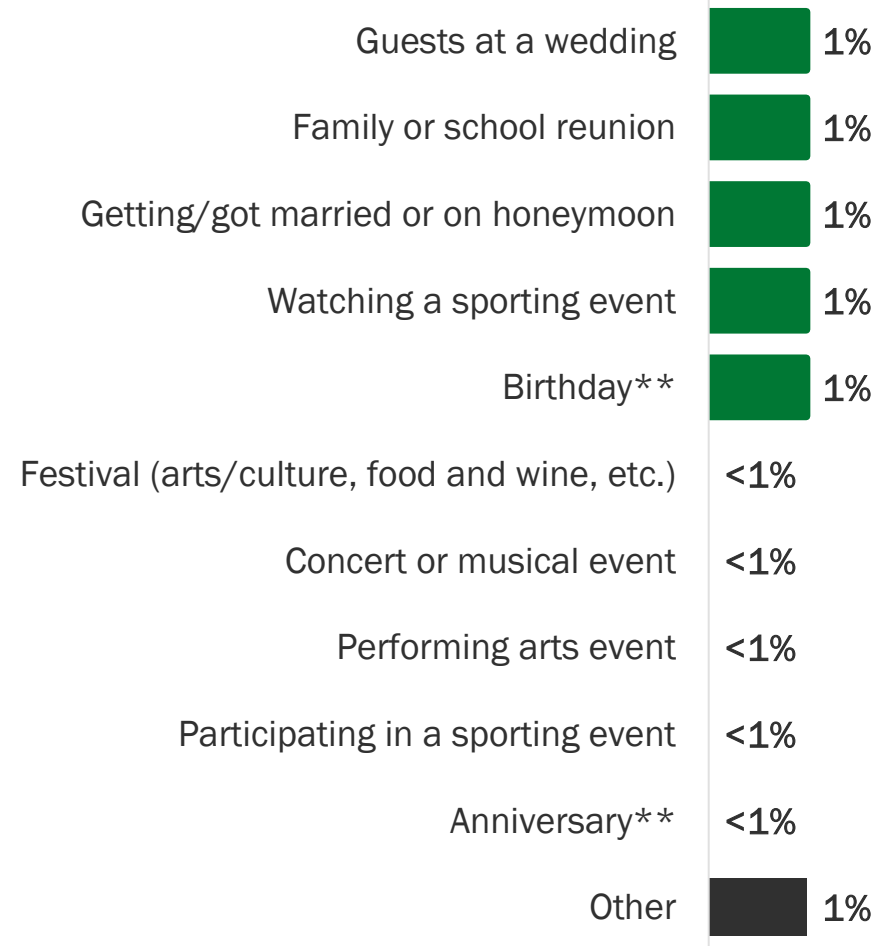


*How would you rate your outdoor recreation activities in Vermont, where 1 is relaxing outdoor activities and 5 is exhilarating/adventurous outdoor activities?
Percents out of visitors who came to Vermont for outdoor recreation.

TYPE OF SPECIAL OCCASION/EVENT*

Special occasions/events are not a top draw for winter, bringing in only 6% of Vermont's visitors.

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



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

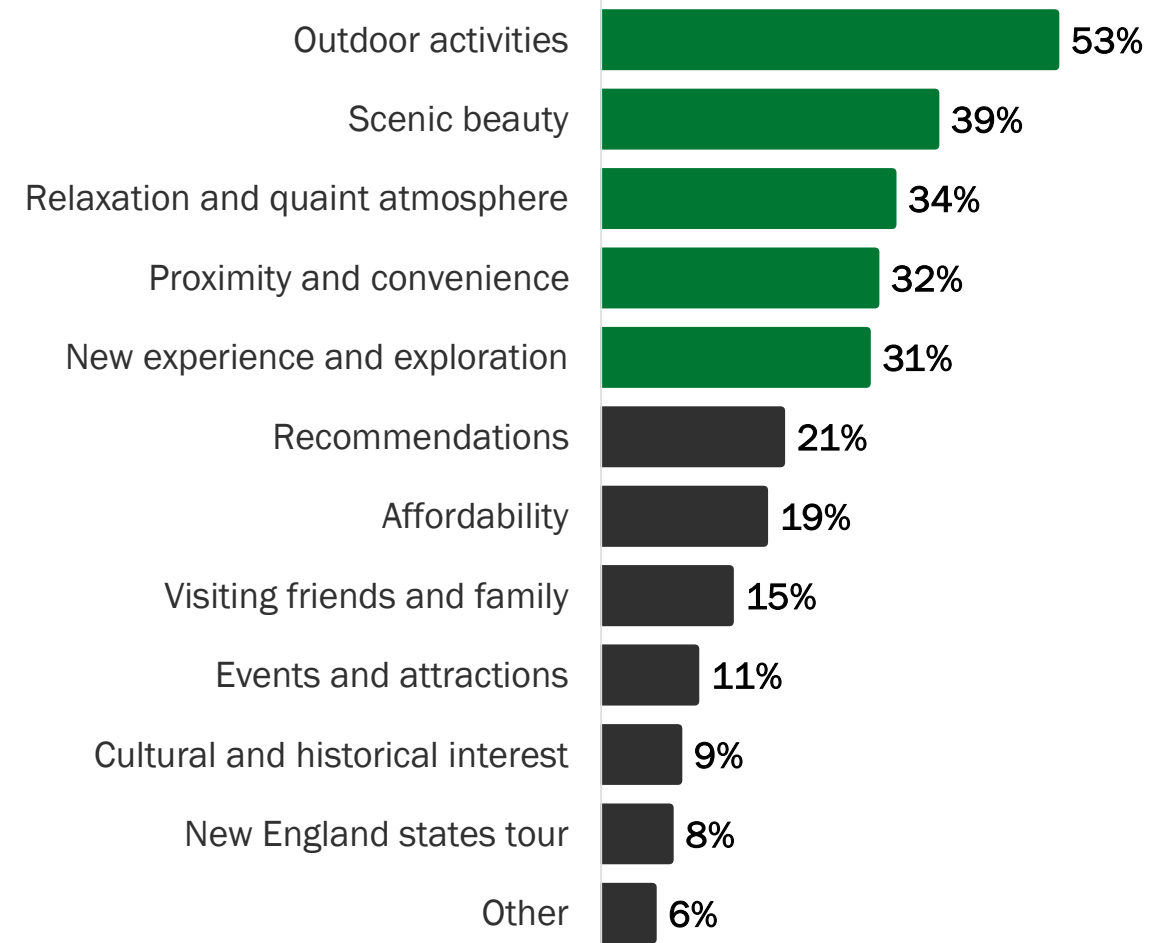
**Recoded from "Other" responses.

REASONS FOR CHOOSING VERMONT

Winter visitors tend to be certain of their destination. Only 16% considered other destinations before choosing to travel to Vermont*

- » **Over half** of those who considered other destinations ended up choosing Vermont for its opportunities for **outdoor activities**
- » **Nearly 2 in 5** settled on Vermont simply for its **scenic beauty**
- » Another **around 1 in 3** chose it for its **atmosphere, proximity**, or opportunities for **new experiences**

Reasons for Choosing Vermont**



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

**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

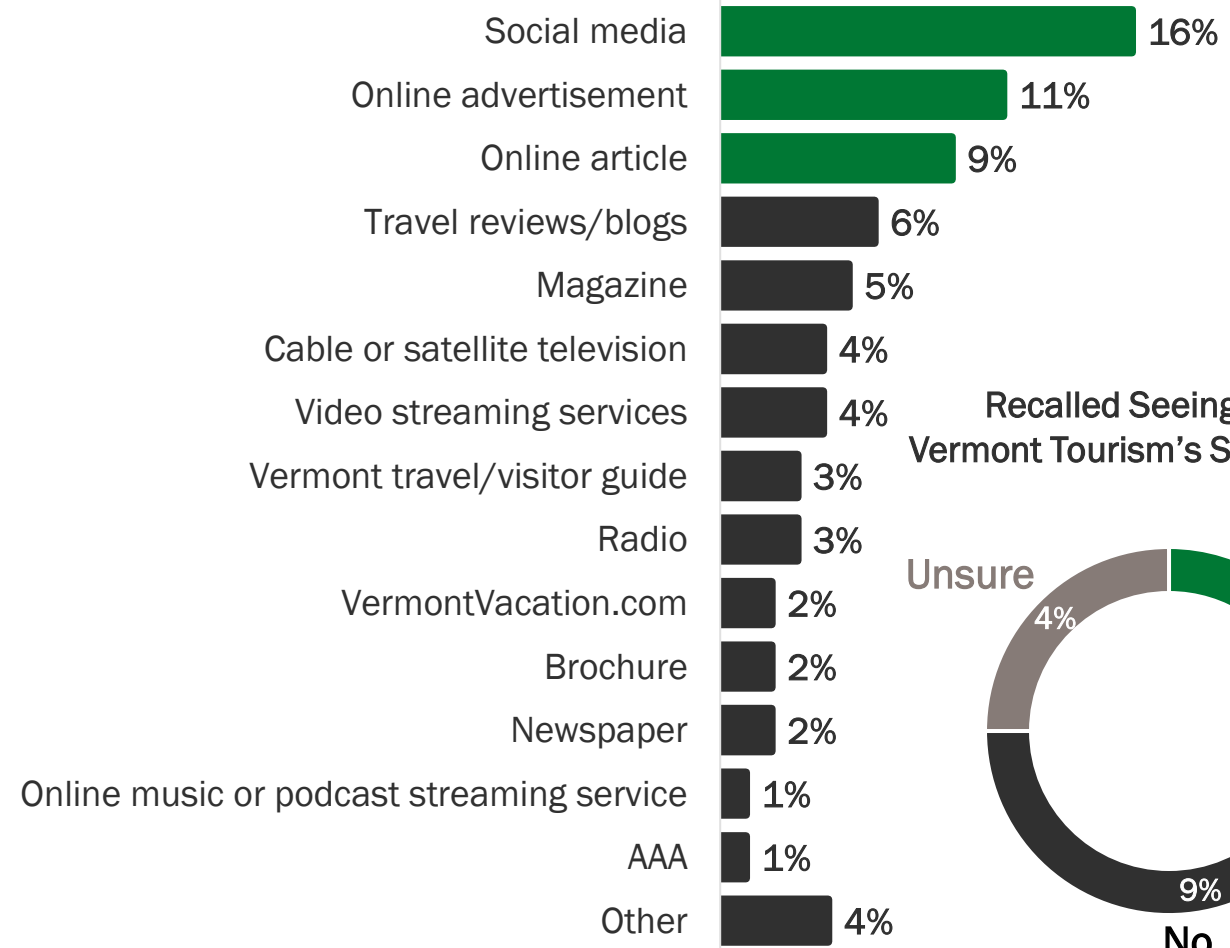
42% of winter visitors recalled seeing ads for Vermont¹

» **Social media** was the most common source of ad recall

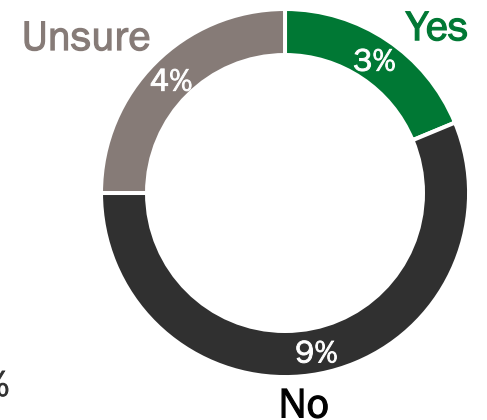
» **3%** of all visitors recalled seeing ads on **Vermont Tourism's social media**

» **Around 1 in 10** winter visitors also recalled seeing ads **online**

Sources of Ad Recall²



Recalled Seeing Ads on Vermont Tourism's Social Media³



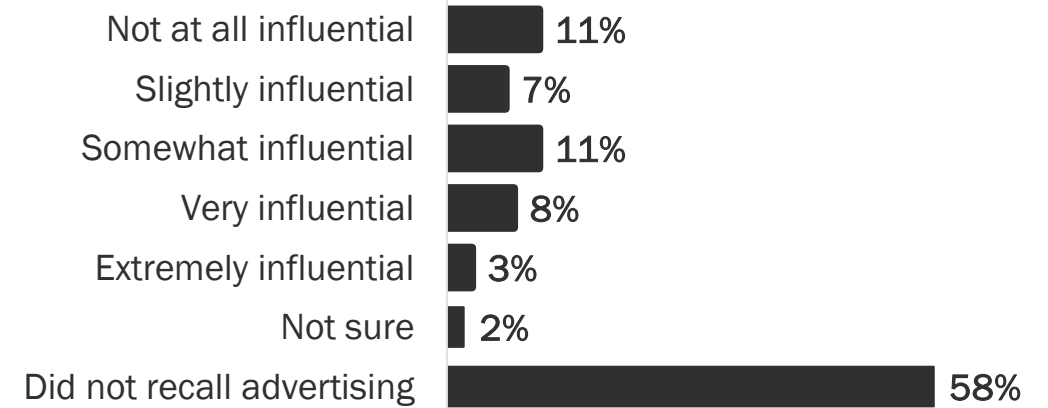
¹Over the past six months, have you seen, read, or heard any travel stories, advertising, or promotions for Vermont?

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 INFLUENCE*

» **Nearly 3 in 10** visitors found advertising, promotions, or travel stories **influential** in their decision to travel to Vermont



*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?

Vermont's winter visitors know what they want. They consult few sources of information when planning their trips and do not rely heavily on social media.

Social media is for exploration and discovery. It holds less value for those who are already familiar – and so winter visitors spend little time there.

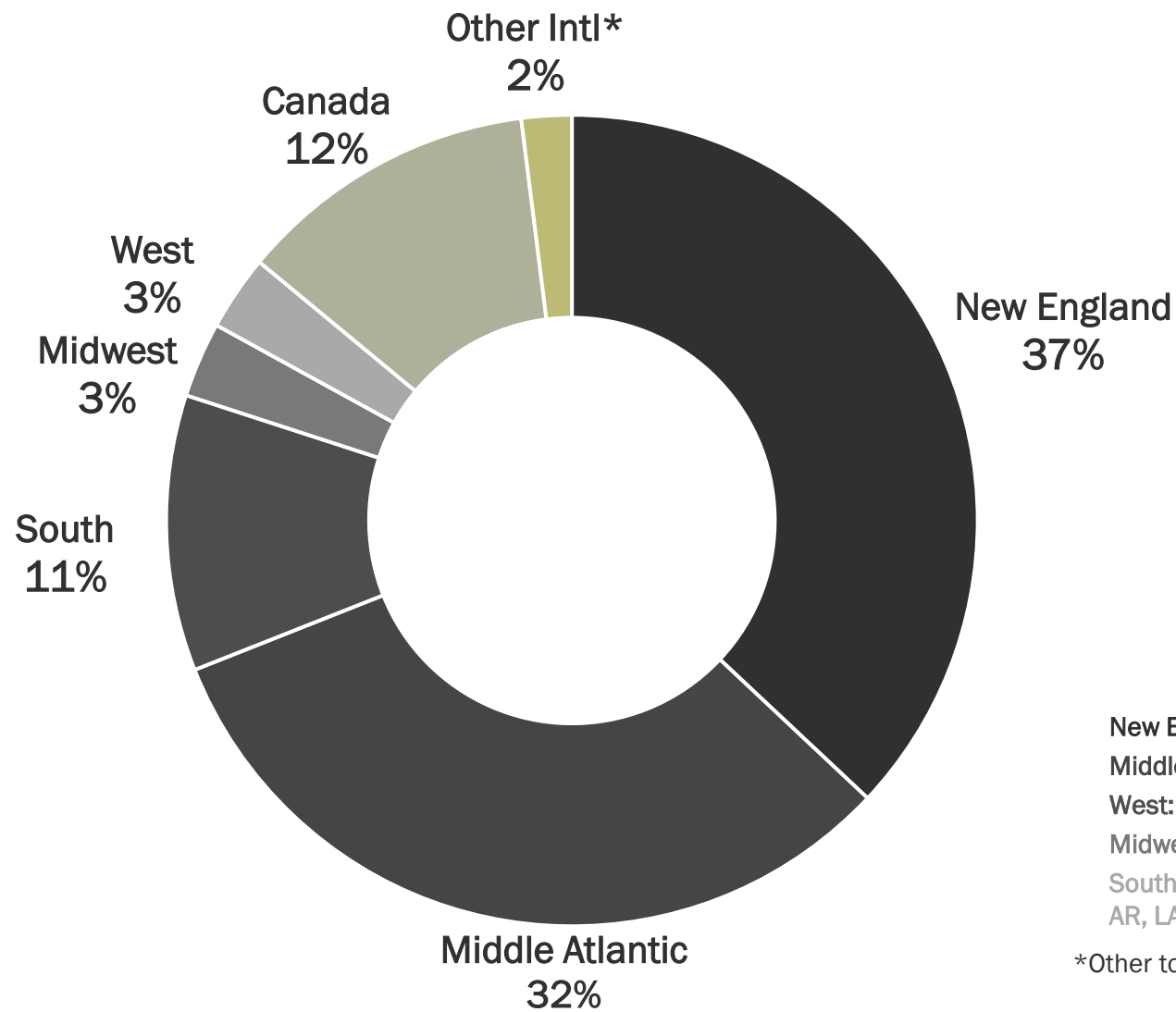
Winter visitors want adventure. They want outdoor activity. More than anything, they want to ski. And not many want anything else.



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 countries of origin were the United Kingdom (0.2%), Australia (0.2%), and Argentina (0.2%).

TOP ORIGIN STATES & PROVINCES

- » **Nearly 9 in 10** visitors traveled from 11 U.S. states and 2 Canadian provinces
- » Most **domestic** visitors travel from **elsewhere in the northeast**, especially the Mid-Atlantic
- » **12%** of Vermont's visitors traveled from **Canada**
 - » **11%** traveled from **Quebec or Ontario**

State/Province	Percent of Visitors
New York	19%
Massachusetts	17%
Quebec	9%
Connecticut	8%
New Hampshire	8%
New Jersey	8%
Pennsylvania	4%
Florida	2%
Maine	2%
Maryland	2%
Rhode Island	2%
Virginia	2%
Ontario	2%
Other States/Provinces*	15%

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

TOP ORIGIN MARKETS

- » **Over 3 in 5** winter visitors traveled from 10 U.S. markets
- » Visitors most commonly traveled to Vermont from **Boston** or **New York City**

U.S. Market	Percent of Visitors
Boston	18%
New York ¹	16%
Albany-Schenectady-Troy	6%
Hartford-New Haven	6%
Burlington-Plattsburgh	4%
Philadelphia	4%
Portland-Auburn	2%
Providence-New Bedford	2%
Springfield-Holyoke	2%
Washington, DC-Hagerstown ²	2%

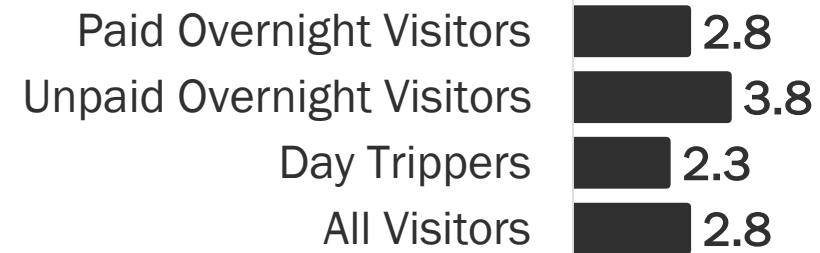
¹ Includes some markets in New Jersey, Pennsylvania, and Connecticut.

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

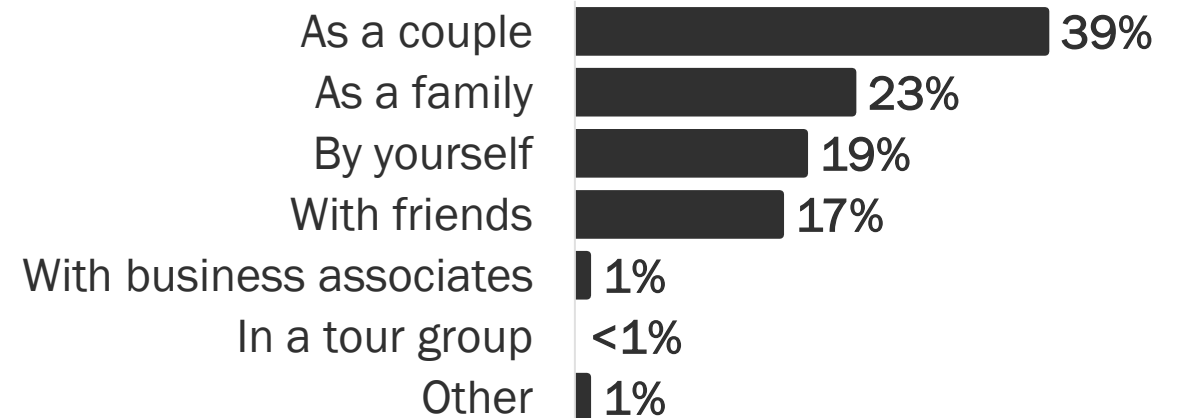
TRAVEL PARTIES

- » Typical visitors traveled to Vermont in **parties** of **2.8¹ people**
 - » Unpaid overnight visitors (those staying with friends, family, or in a personal second home) traveled in the largest parties
 - » Day trippers traveled in the smallest parties
- » **18%** of all visitors traveled with one or more **children⁴** in their travel party

Travel Party Size by Visitor Type²



Travel Party Composition³



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

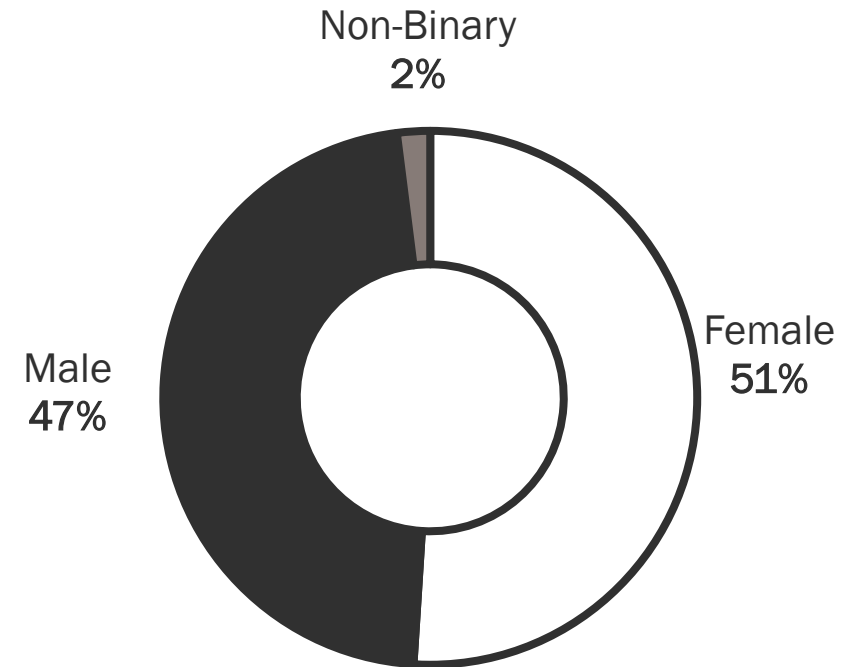
²Including yourself, how many people were in your immediate travel party on this specific trip in Vermont?

³On this trip, are you traveling:

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

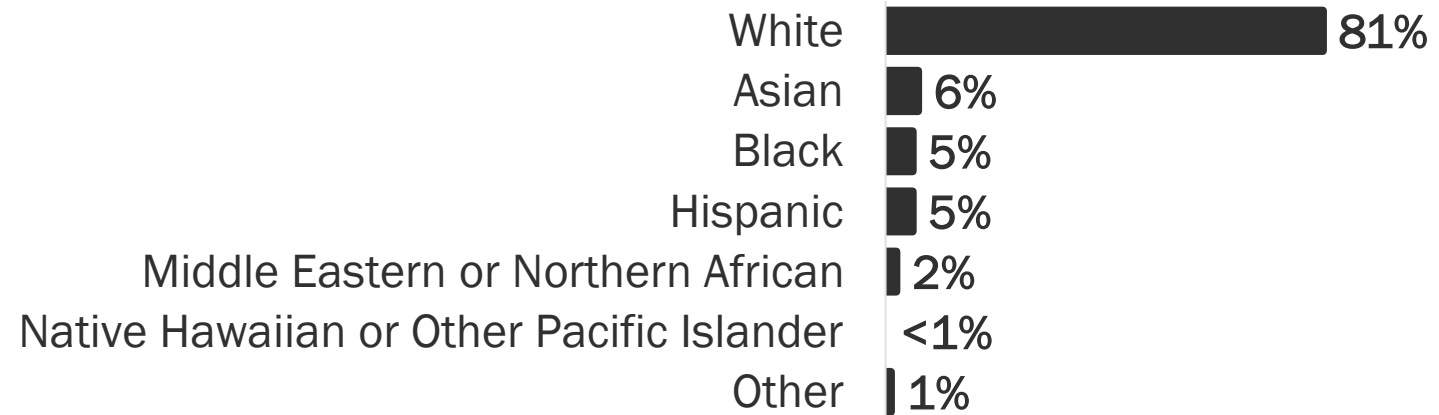
GENDER*

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



RACE & ETHNICITY*

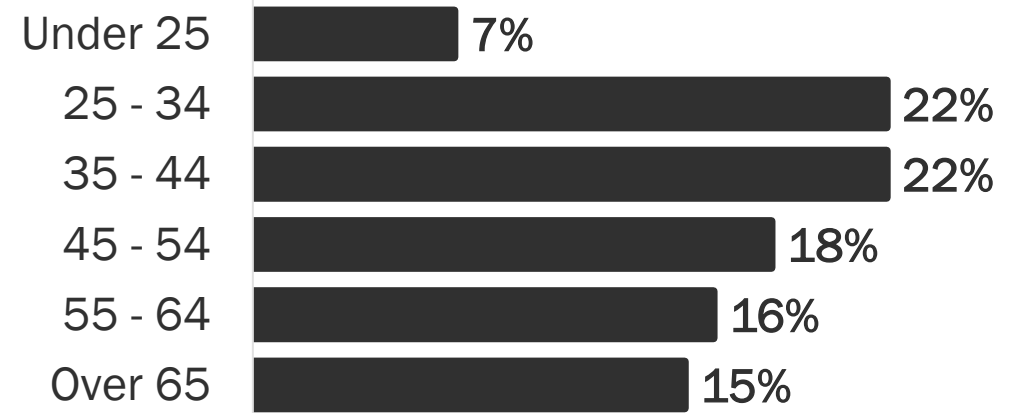
- » **Over 4 in 5** visitors to Vermont identify their race as **white/Caucasian**
- » The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.



*How do you identify your race/ethnicity?

AGE*

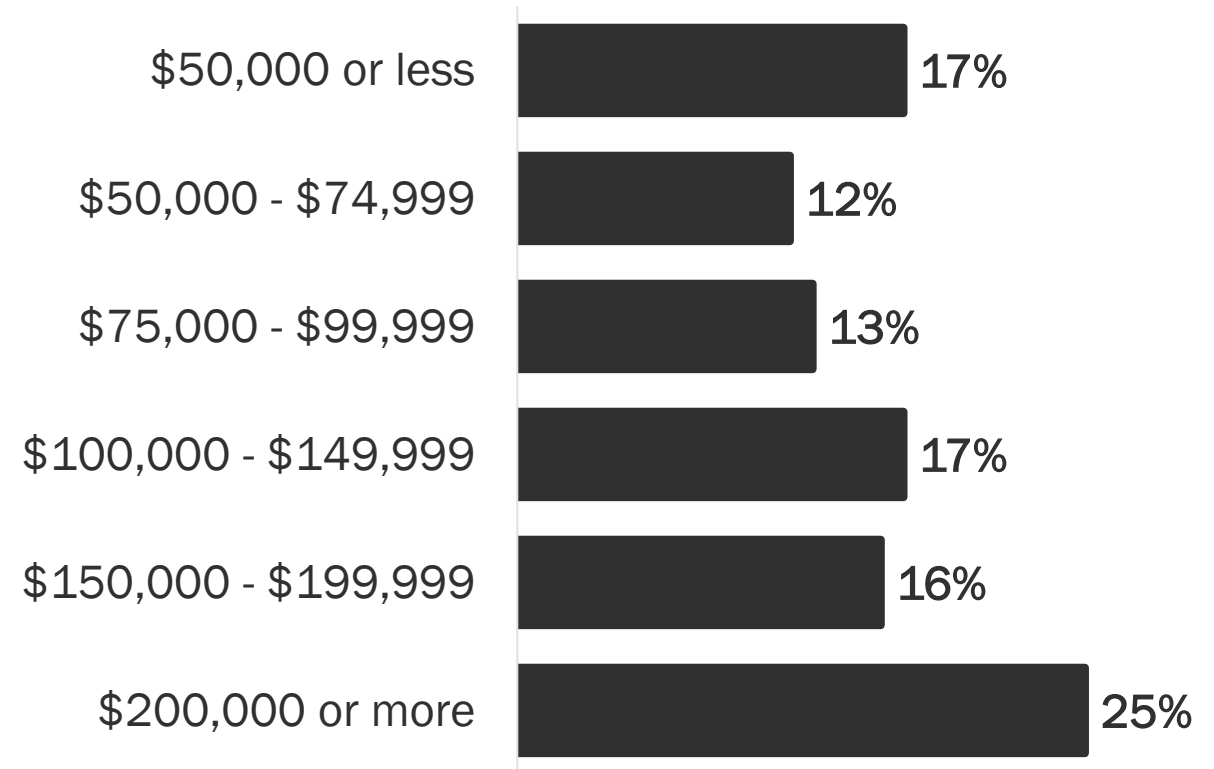
- » The median **age** of adult winter visitors to Vermont who participated in this survey on behalf of their travel party is **45** years old
- » The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.



*Which category best fits your age?

HOUSEHOLD INCOME*

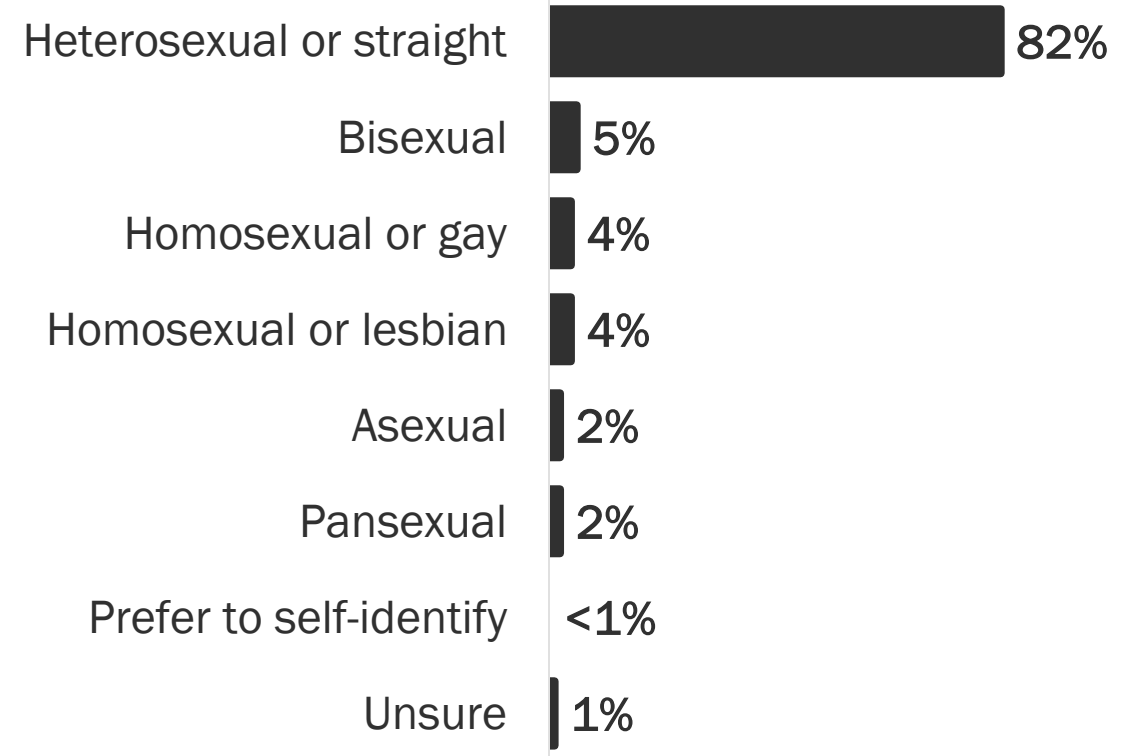
- » The median annual household **income** of winter visitors to Vermont is **\$123,530**
- » **58%** of winter visitors to Vermont earned **more than \$100,000** per year
- » **25%** earned more than **\$200,000**



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

SEXUAL ORIENTATION*

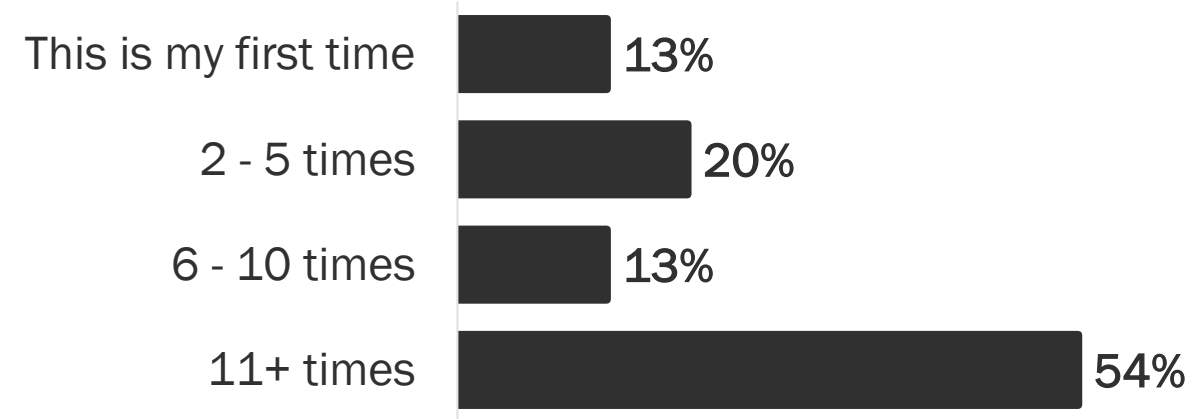
- » **Over 4 in 5** visitors to Vermont consider themselves **heterosexual** or straight
- » **Nearly 1 in 5** do **not** consider themselves heterosexual
- » **5%** consider themselves **bisexual**
- » **8%** consider themselves **gay or lesbian**
- » The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.



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

NEW & RETURNING VISITORS*

- » Only about **1 in 8** winter visitors were in the state for the **first time**
- » **Over half** had been to Vermont **more than 10 times**

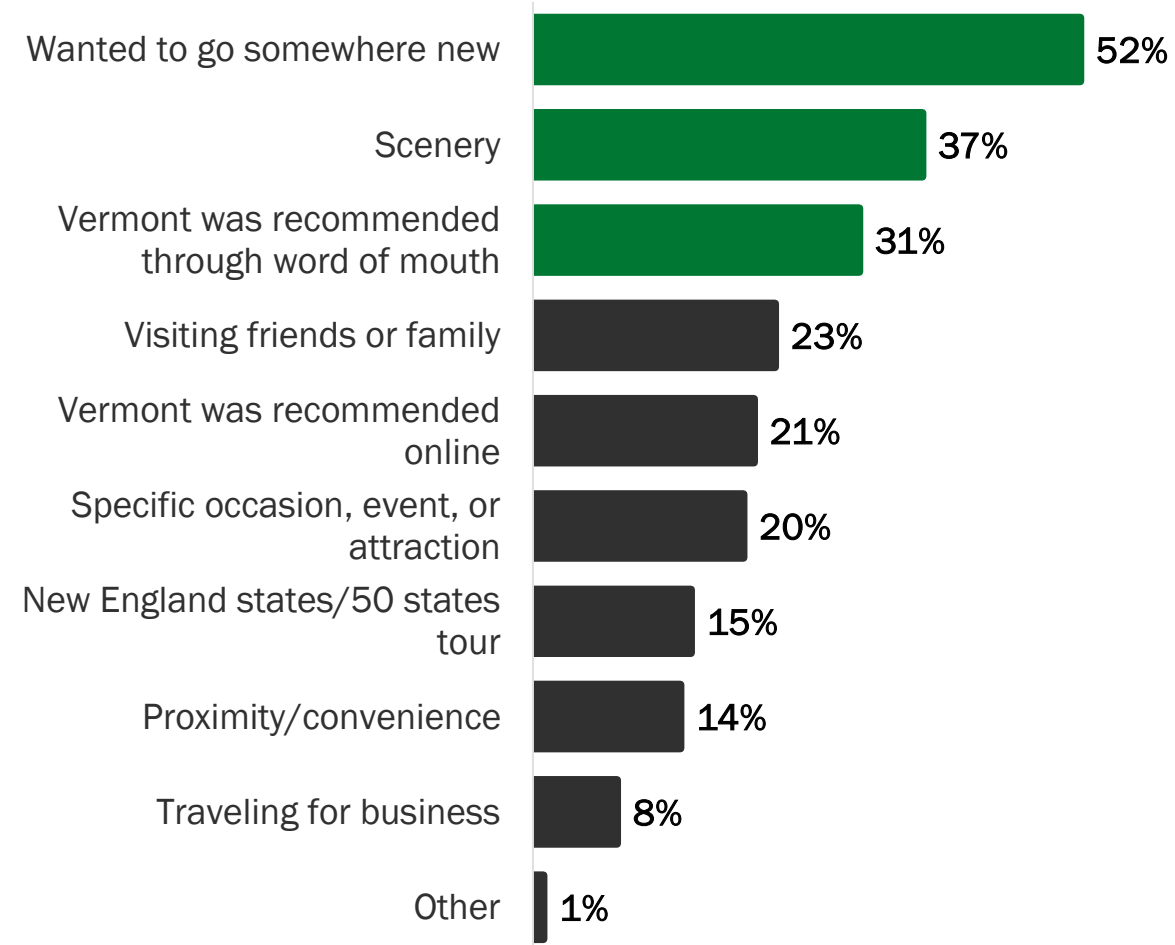


*Approximately how many times have you visited Vermont?

REASONS FOR FIRST TRIP TO VERMONT*

Of the 13% of Vermont's winter visitors who were visiting the state for the first time:

- » **Over half** just wanted to go **somewhere new**
- » **Over 1 in 3** first-time winter visitors come to Vermont for its **scenery**
- » **Over 3 in 10** came to the state on the **recommendations of others**

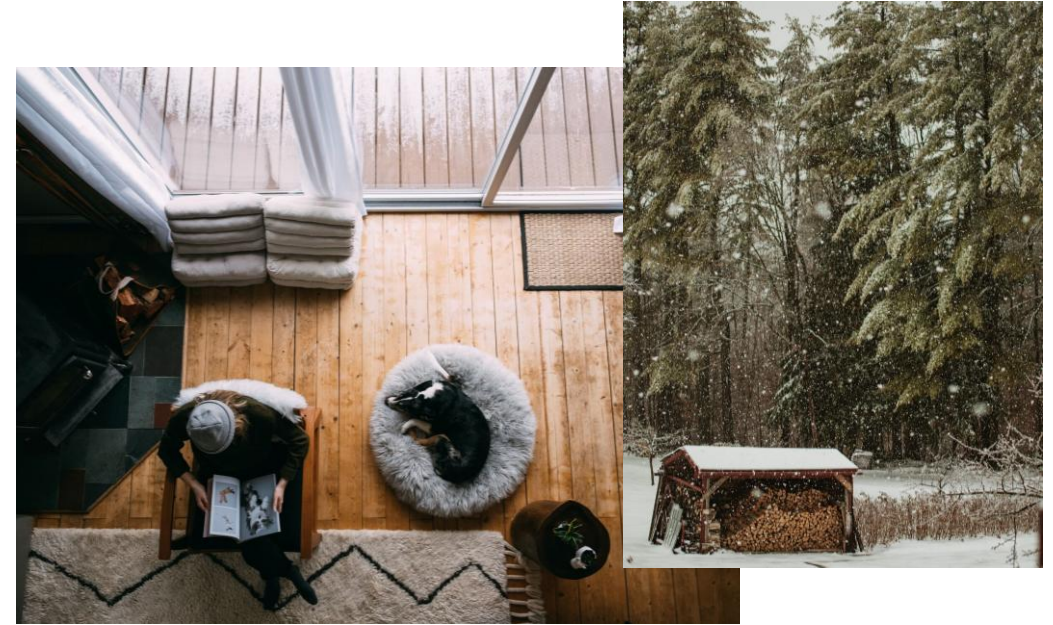


*What inspired this first trip to Vermont? Multiple responses permitted. Percents out of those who were visiting for the first time.

TRAVELER PROFILE SUMMARY

VERMONT'S WINTER TRAVELER WHO ARE THEY?

Vermont's winter visitors are adventurous. They travel north and east from Pennsylvania, New Jersey, and especially New York. And these winter visitors have been here before – coming back year after year to hit the slopes.



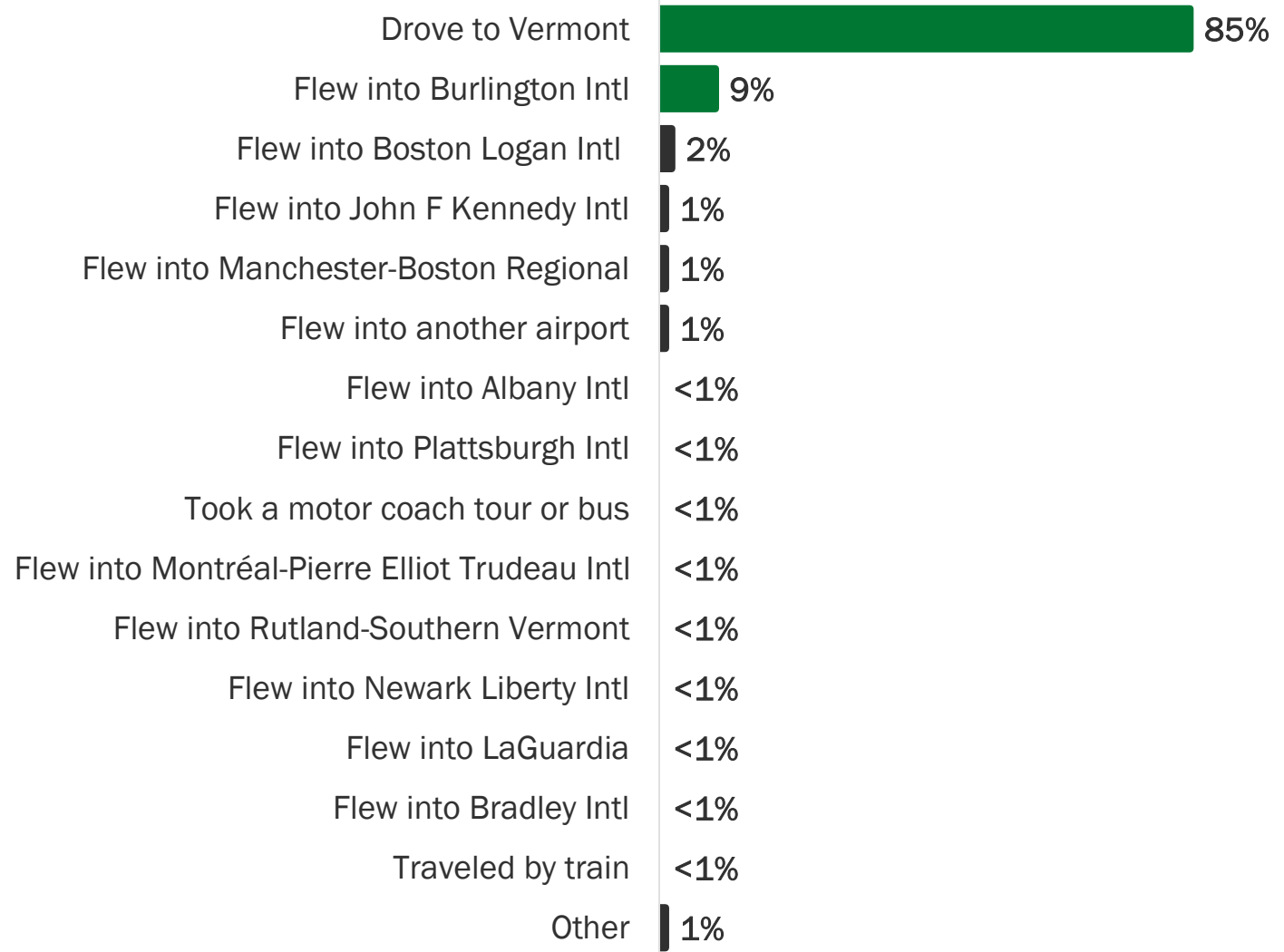
VISITOR JOURNEY : TRIP EXPERIENCE



MODES OF TRANSPORTATION*

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 visitors drove to Vermont in a **fully-electric vehicle** (EV)**
- » Most visitors who **fly** to Vermont arrive at **Burlington International Airport**



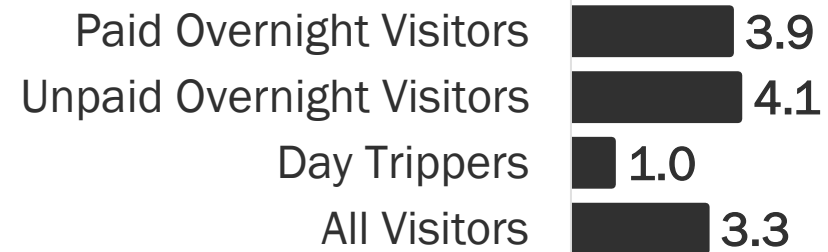
*What was your primary mode of transportation on this trip?

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

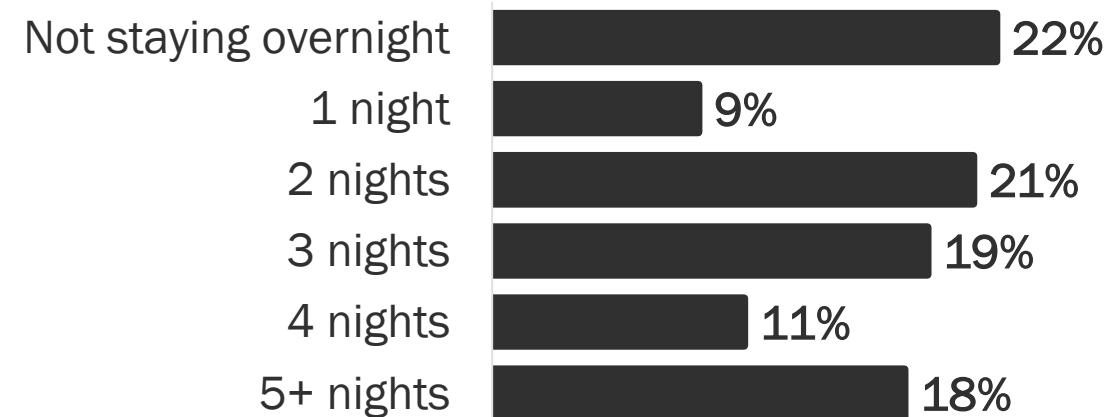
NIGHTS STAYED*

- » Typical visitors stayed **3.3** nights** in Vermont on their trips
- » Typical visitors staying overnight in **paid accommodations** stayed **3.9 nights**
- » For visitors staying in a **hotel**, the average length of stay was **3.0 nights**. For those staying in a **vacation rental**, it was **4.2 nights**.
- » **Nearly 4 in 5** visitors stayed **one or more nights** in Vermont on their trip

Nights Stayed by Visitor Type



Nights Stayed Breakdown



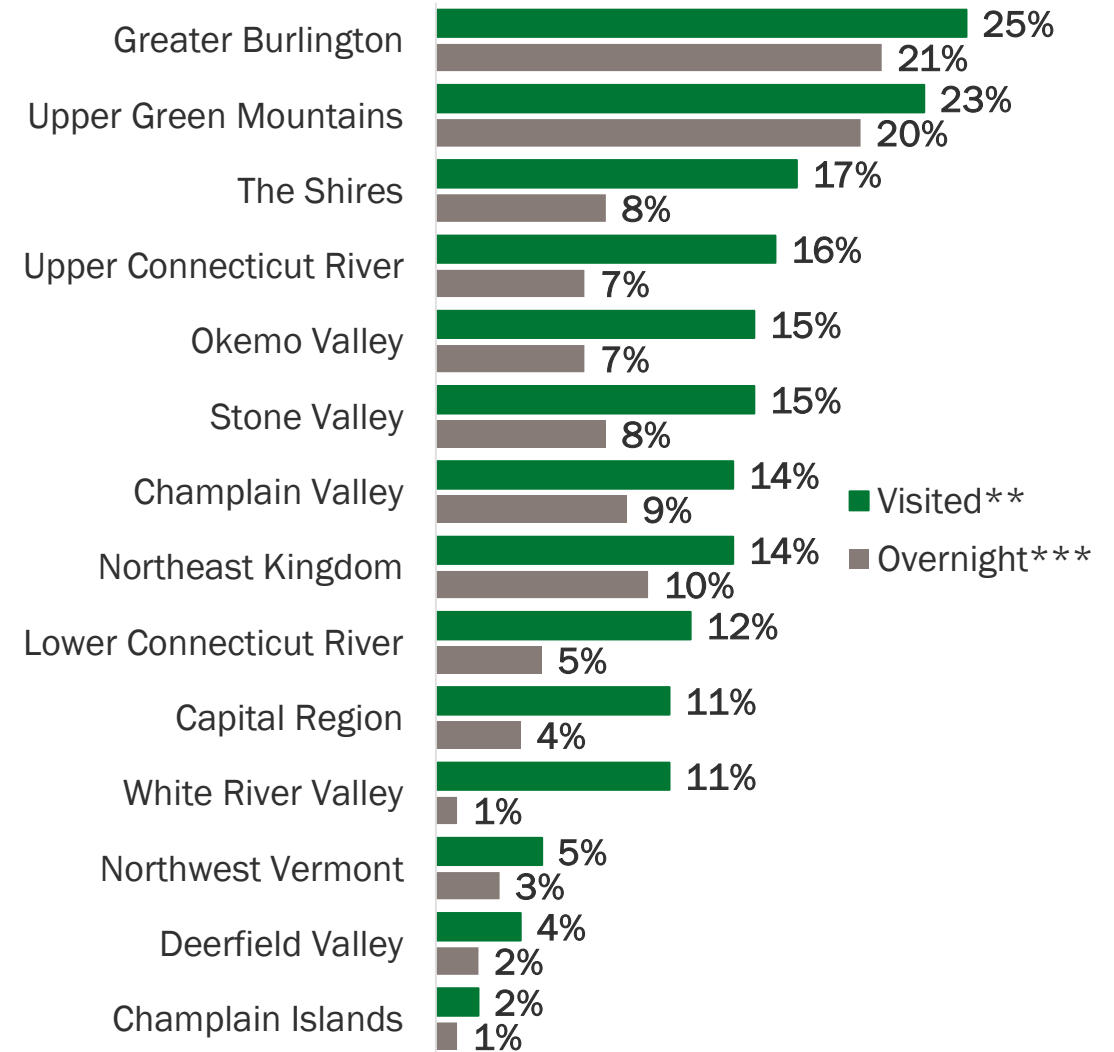
*How many nights are you staying in Vermont on this trip?

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

REGIONS STAYED IN AND VISITED*

Vermont's winter visitors enjoy visits to a variety of areas across the state, while mainly choosing to stay overnight in two of the state's regions.

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



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

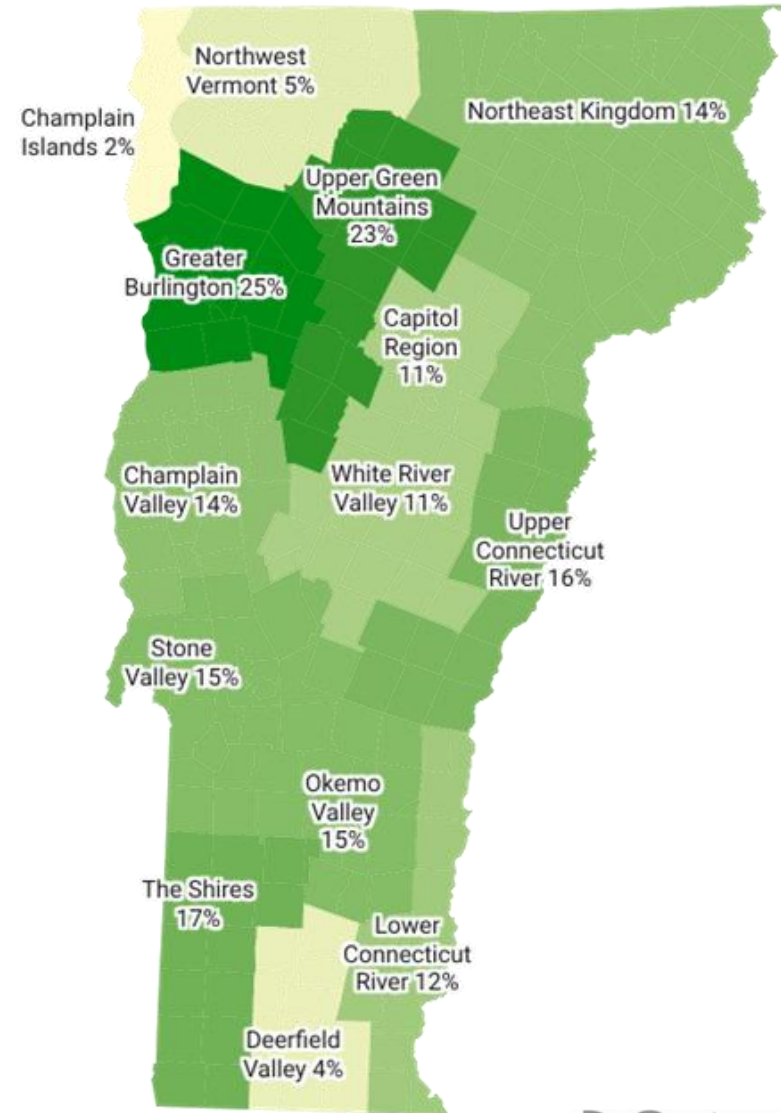
**Which regions of Vermont do you intend to visit on this trip?

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

Multiple responses permitted.

REGIONS STAYED IN AND VISITED

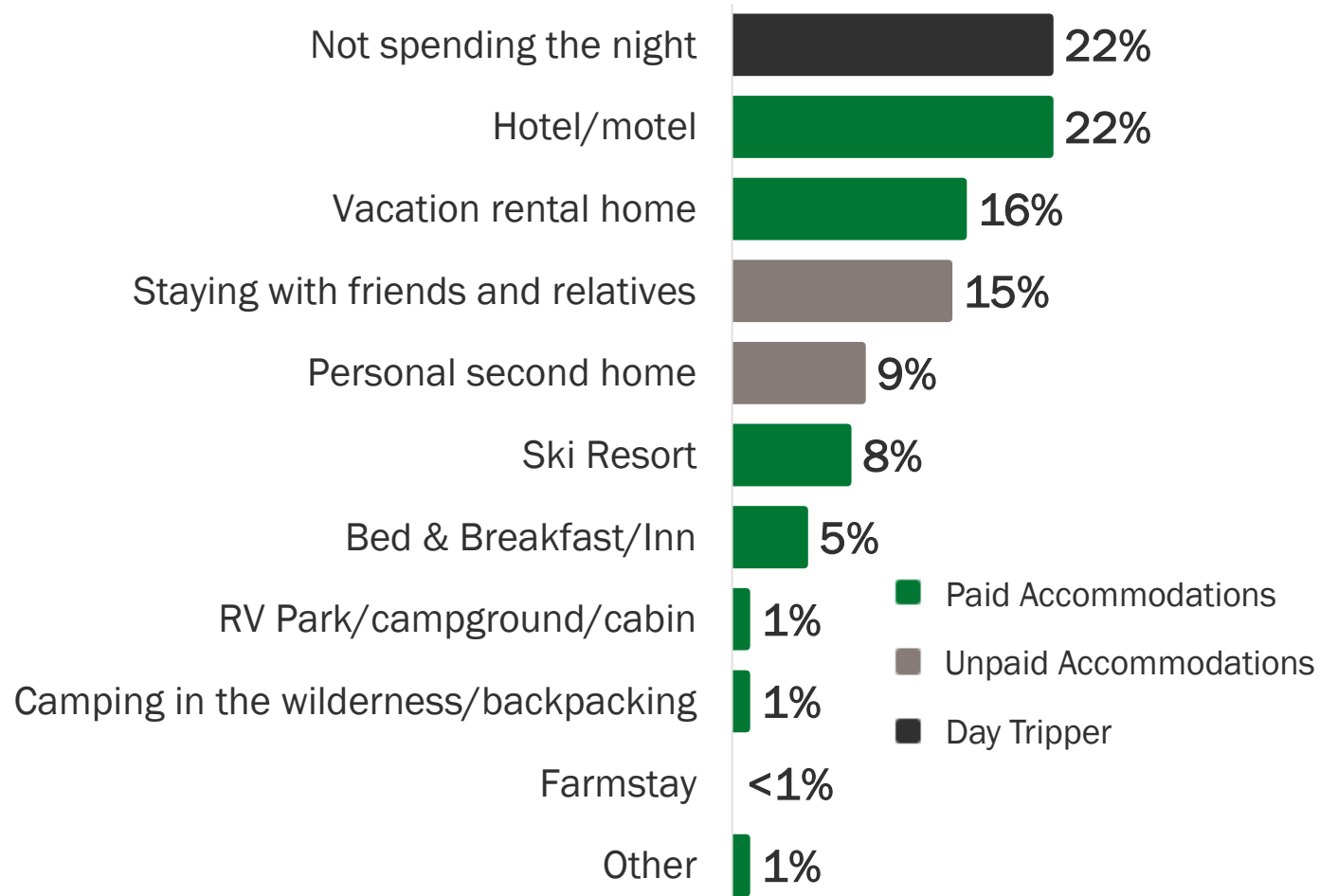
- » This map depicts the regions of Vermont that visitors said they visited while on their trip. This includes visitors staying overnight in those regions and visitors who take day trips to regions other than where they are staying.



ACCOMMODATIONS*

53% of Vermont's winter visitors stayed overnight in paid accommodations.

- » Of those, 42% stayed overnight in a hotel/motel
- » 30% stayed in a vacation rental
- » 15% stayed in a ski resort
- » 9% stayed in a B&B/inn
- » 4% stayed at a campground, RV park, or in the wilderness

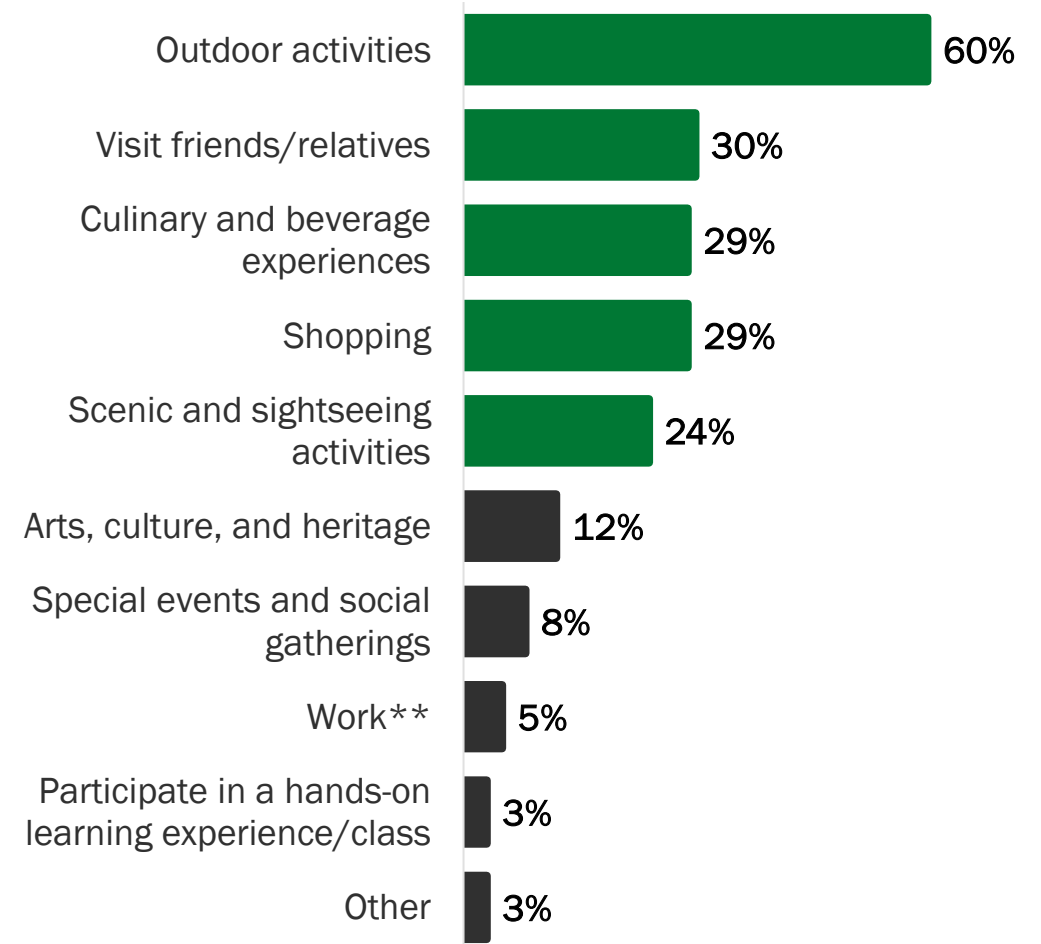


*In what type of accommodations are you staying on this trip?

VISITOR ACTIVITIES*

The activities winter visitors engage in mirror the reasons they came to Vermont in the first place – primarily outdoor recreation.

- » **Outdoor recreation, visiting friends/relatives, local food and drinks, shopping, and scenic activities** are in both the top draws for winter and the top activities leisure visitors enjoy while in Vermont



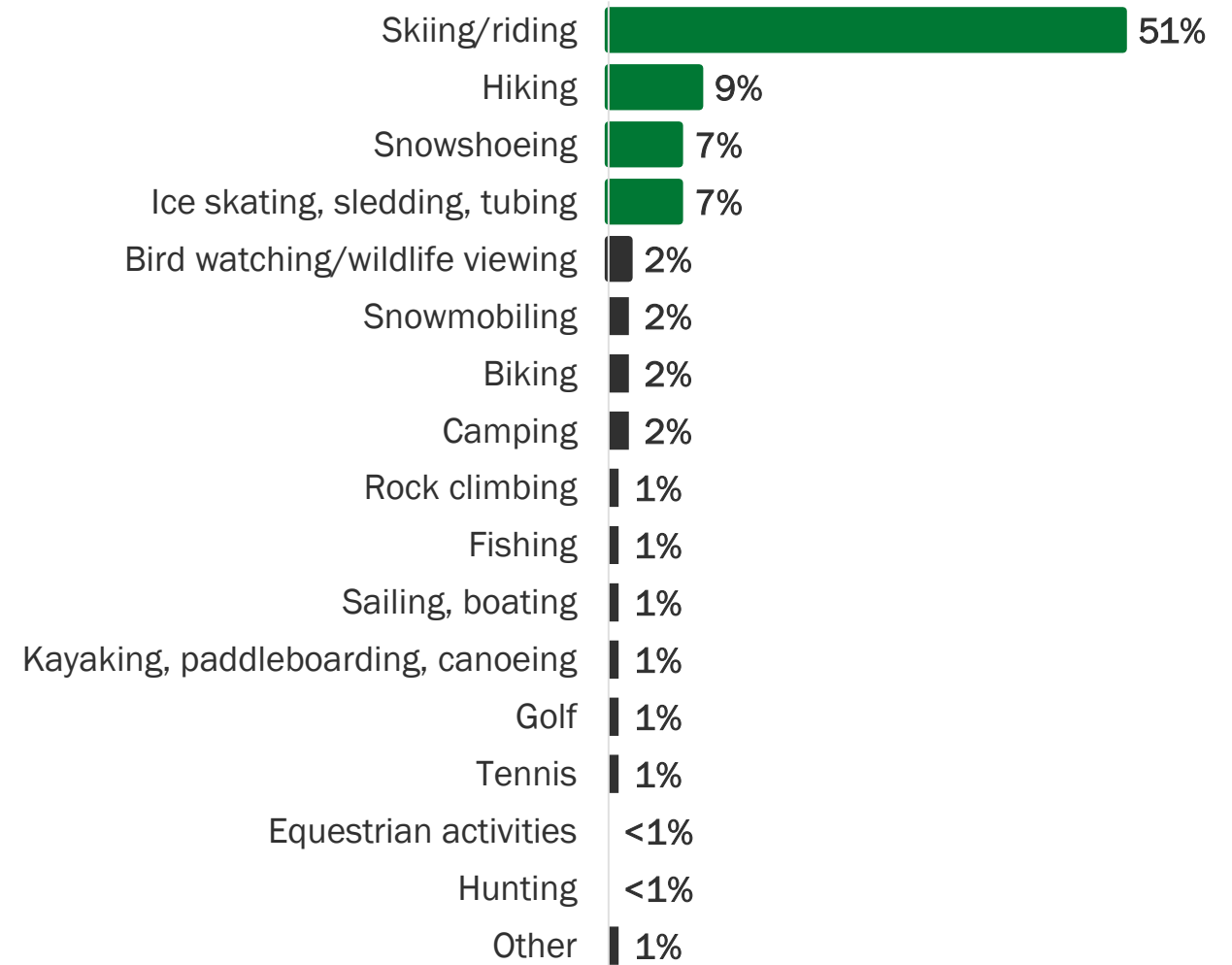
*In which of the following activities did/will you participate during this trip? *Multiple responses permitted.*

**Recoded from "Other" write-in responses.

OUTDOOR ACTIVITIES*

3 in 5 winter Vermont visitors engage in outdoor activities while in the state.

- » Just as **skiing, hiking, and other snow activities** were the top outdoor recreation draws for winter visitors, they were also the most popular outdoor activities
- » Of those who engaged in outdoor recreation activities, **42%** did **only one activity**

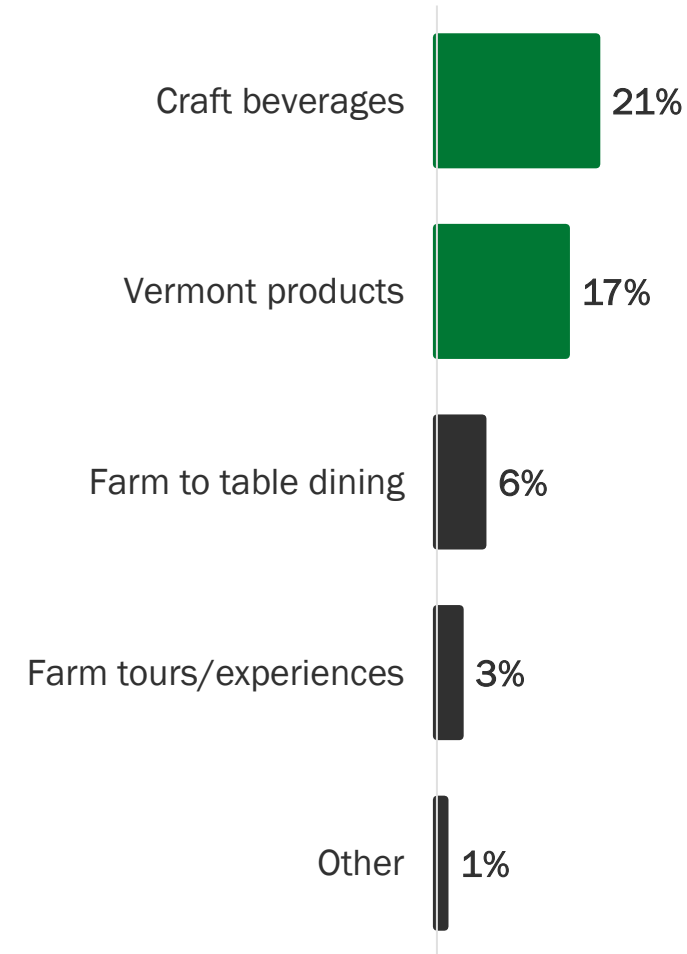


*Which of the following outdoor activities did/will you participate in during this trip?
Multiple responses permitted. Percents out of all visitors.

FOOD & BEVERAGE ACTIVITIES*

Wineries, cideries, breweries, distilleries, creameries, and cheese/maple product shops are popular destinations for **nearly 3 in 10** winter Vermont visitors.

- » **Nearly 1 in 5** visitors enjoy **craft beverages** while in Vermont
- » **Over 1 in 6** try local **maple, cheese, and cream** products

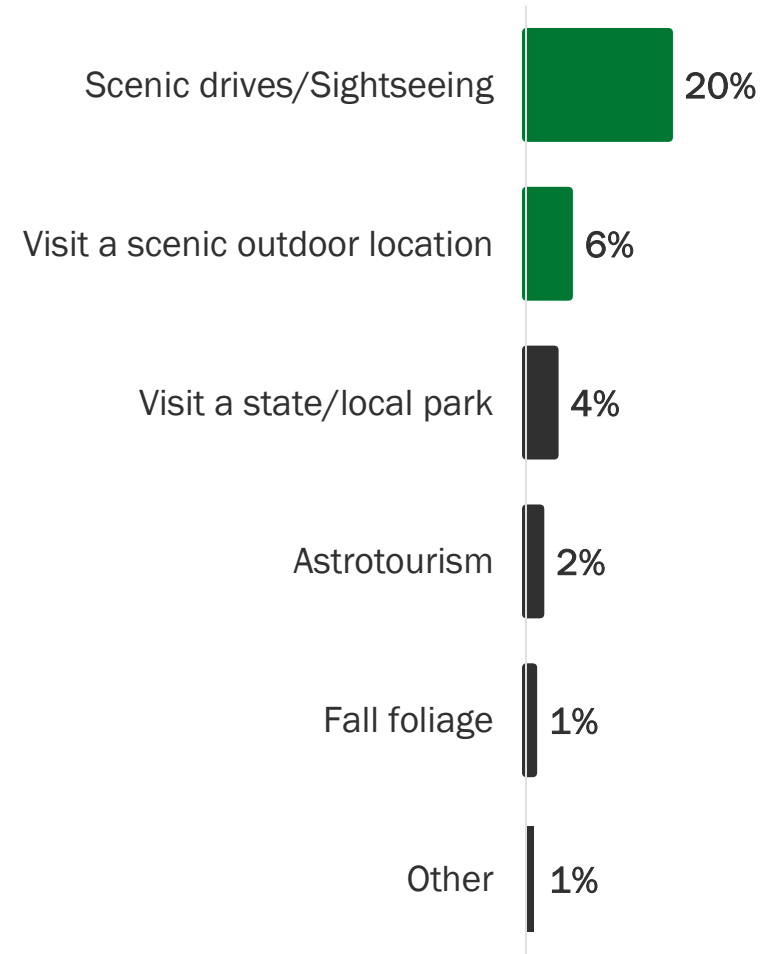


*Which of the following culinary and beverage experiences did/will you participate in during this trip?
Multiple responses permitted. Percents out of all visitors.

SCENIC & SIGHTSEEING ACTIVITIES*

Nearly 1 in 4 winter visitors engage in scenic and sightseeing activities while in Vermont.

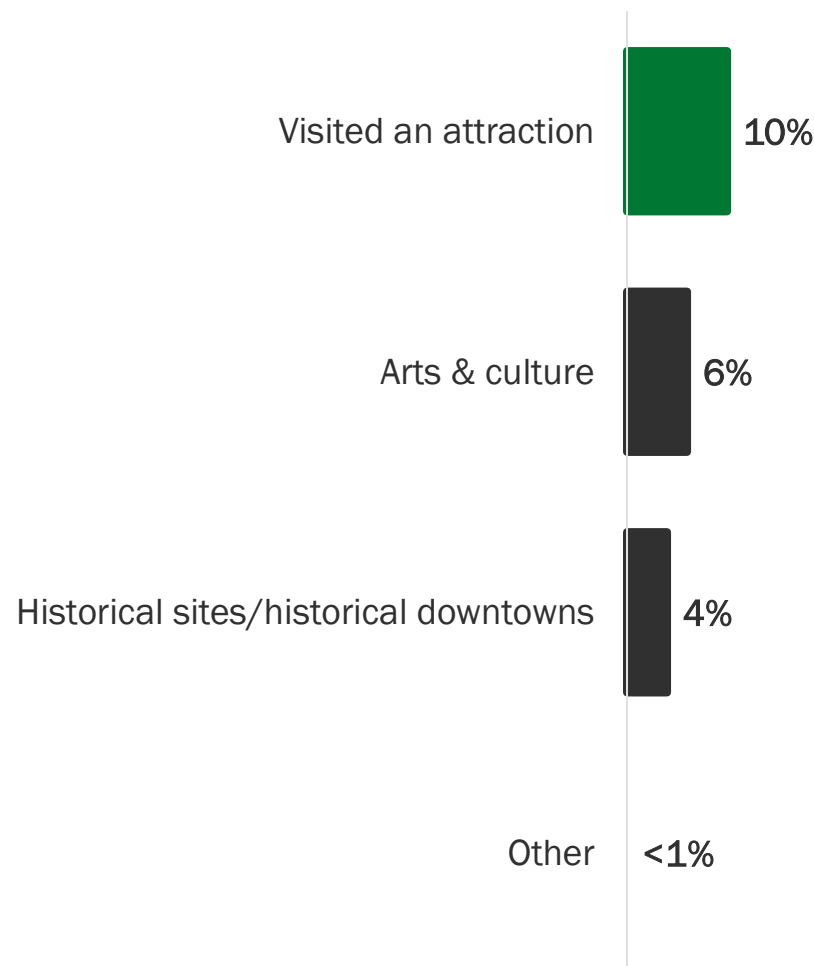
» The most popular activity was going on a **scenic drive** (20% of all visitors)



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

ARTS, CULTURE, & HERITAGE ACTIVITIES*

1 in 10 of Vermont's winter visitors visited an art gallery, museum, or historical site.



*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 EVENTS*

8% of winter visitors attend a special event or social gathering while in Vermont.

» Most attended or participated in a **special event/festival** – 6% of all visitors

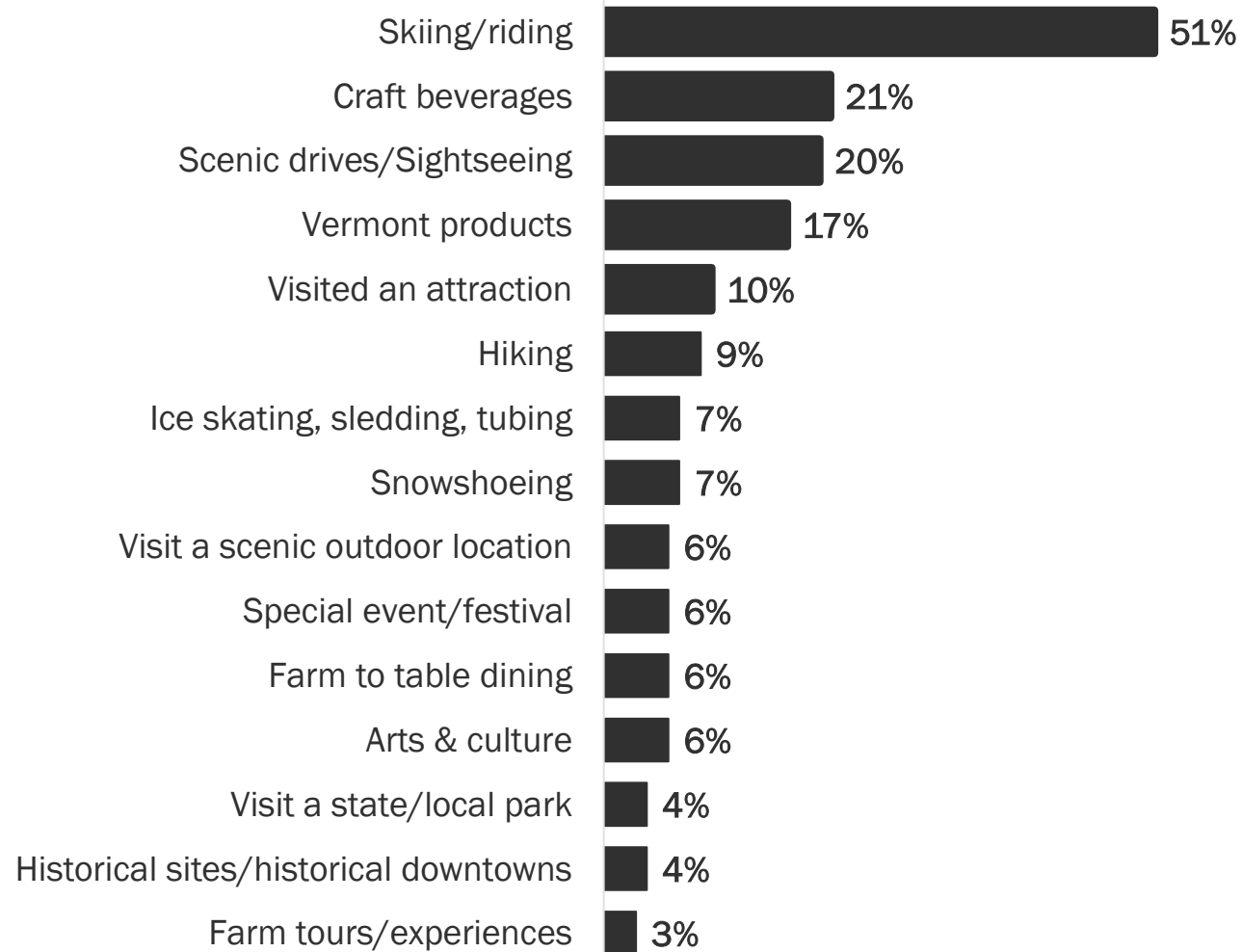


*Which of the following special events or social gatherings did/will you participate in during this trip?

Multiple responses permitted. Percents out of all visitors.

**Top events/festivals attended included maple open house weekend, Curds and Curling, Brats and Brews, concerts, film festivals, and light festivals.

TOP ACTIVITIES*



*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 ACTIVITIES*

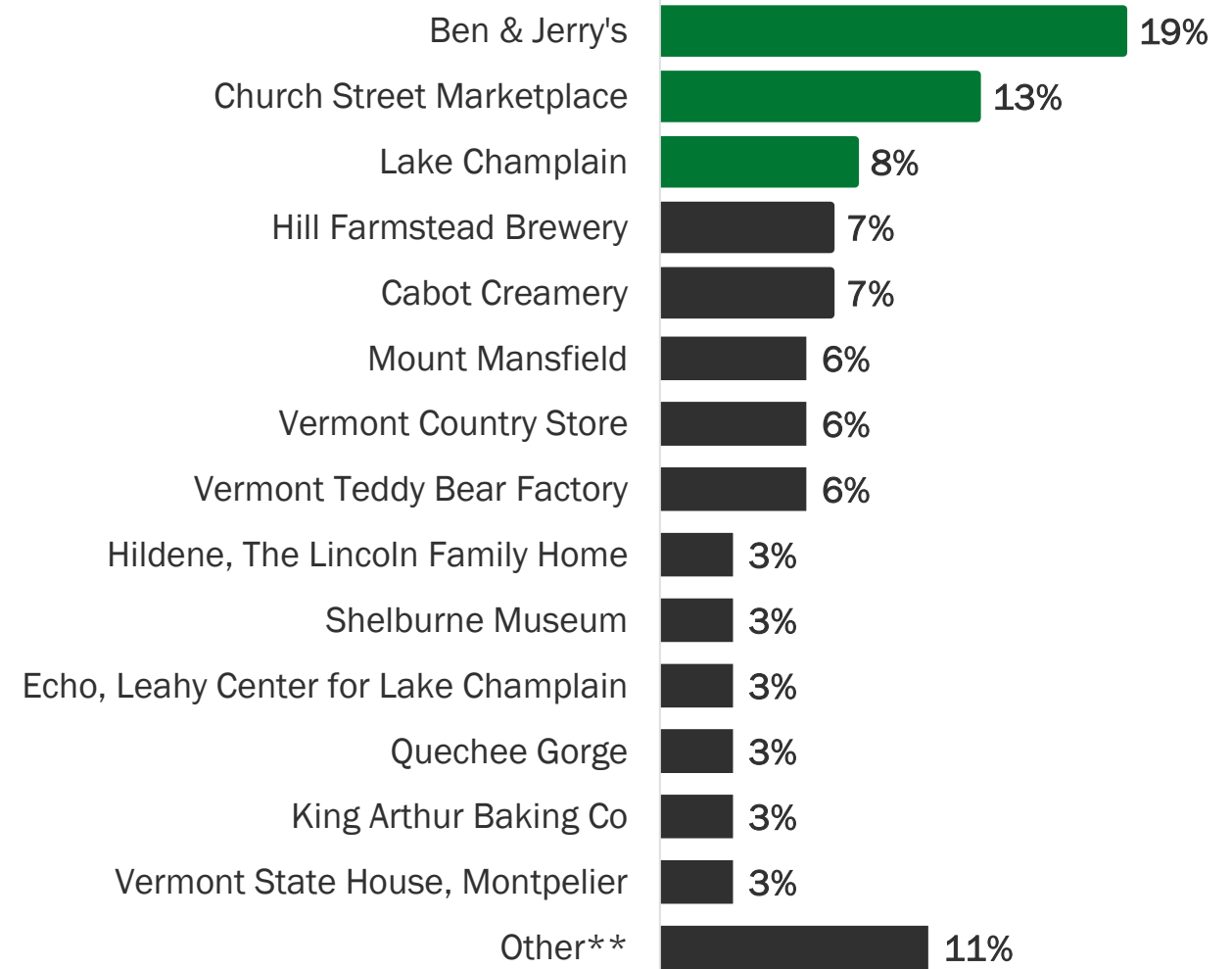
Activity	Percent	Activity	Percent
Skiing/riding	51%	Astrotourism	2%
Craft beverages	21%	Bird watching/wildlife viewing	2%
Scenic drives/Sightseeing	20%	Snowmobiling	2%
Vermont products	17%	Biking	2%
Visited an attraction	10%	Camping	2%
Hiking	9%	Attend or participate in a sporting event	1%
Ice skating, sledding, tubing	7%	Fishing	1%
Snowshoeing	7%	Rock climbing	1%
Visit a scenic outdoor location	6%	Attend a wedding	1%
Special event/festival	6%	Golf	1%
Farm to table dining	6%	Kayaking, paddleboarding, canoeing	1%
Arts & culture	6%	Sailing, boating	1%
Visit a state/local park	4%	Tennis	1%
Historical sites/historical downtowns	4%	Equestrian activities	<1%
Farm tours/experiences	3%	Hunting	<1%

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

TOP PLACES VISITED*

Outside of ski resorts, Vermont's winter visitors enjoy sampling local food and drinks, shopping in downtown areas, and seeking out scenic vistas.

- » **Ben & Jerry's** was the most popular destination, visited by **nearly 1 in 5 visitors**
- » Another **13%** visited the **Church Street Marketplace**
- » **8%** went to see **Lake Champlain**



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

Multiple responses permitted. Top 14 places shown; continued on next slide.

** Other places visited included the Trapp Family Lodge, The Alchemist, Killington Resort, Jay Peak Resort, Cold Hollow Cider Mill, Okemo Resort, and Sugarbush Farm.

ALL PLACES VISITED*

Attraction Visited	Percent	Attraction Visited	Percent
Ben & Jerry's	19%	Morse Farm Maple Sugarworks	2%
Church Street Marketplace	13%	Caledonia Spirits	2%
Lake Champlain	8%	Marsh-Billings-Rockefeller National Historical Park	1%
Hill Farmstead Brewery	7%	Vermont Institute of Natural science	1%
Cabot Creamery	7%	Southern Vermont Arts Center	1%
Mount Mansfield	6%	Bennington Battle Monument	1%
Vermont Country Store	6%	Billings Farm	1%
Vermont Teddy Bear Factory	6%	Colchester Causeway	1%
Hildene, The Lincoln Family Home	3%	Lake Willoughby	1%
Shelburne Museum	3%	Mount Equinox Skyline Drive	1%
Echo, Leahy Center for Lake Champlain	3%	Kingdom Trails	1%
Quechee Gorge	3%	Lamoille Valley Rail Trail	<1%
King Arthur Baking Co	3%	Montshire Museum of Science	<1%
Vermont State House, Montpelier	3%	Other**	11%
Fairbanks Museum & Planetarium	2%	None	45%
Shelburne Farms	2%		

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

**Other places visited included the Trapp Family Lodge, The Alchemist, Killington Resort, Jay Peak Resort, Cold Hollow Cider Mill, Okemo Resort, and Sugarbush Farm.

DAILY TRAVEL PARTY SPENDING*

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

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$165	\$0	\$0
Restaurants	\$97	\$102	\$57
Groceries	\$27	\$38	\$10
Shopping	\$62	\$59	\$53
Activities & attractions	\$56	\$83	\$35
Transportation	\$39	\$43	\$24
Other	\$8	\$11	\$7
Daily Spending	\$454	\$336	\$186

*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	\$644	\$0	\$0
Restaurants	\$378	\$418	\$57
Groceries	\$105	\$156	\$10
Shopping	\$242	\$242	\$53
Activities & attractions	\$218	\$340	\$35
Transportation	\$152	\$176	\$24
Other	\$31	\$45	\$7
Trip Spending	\$1,770	\$1,377	\$186

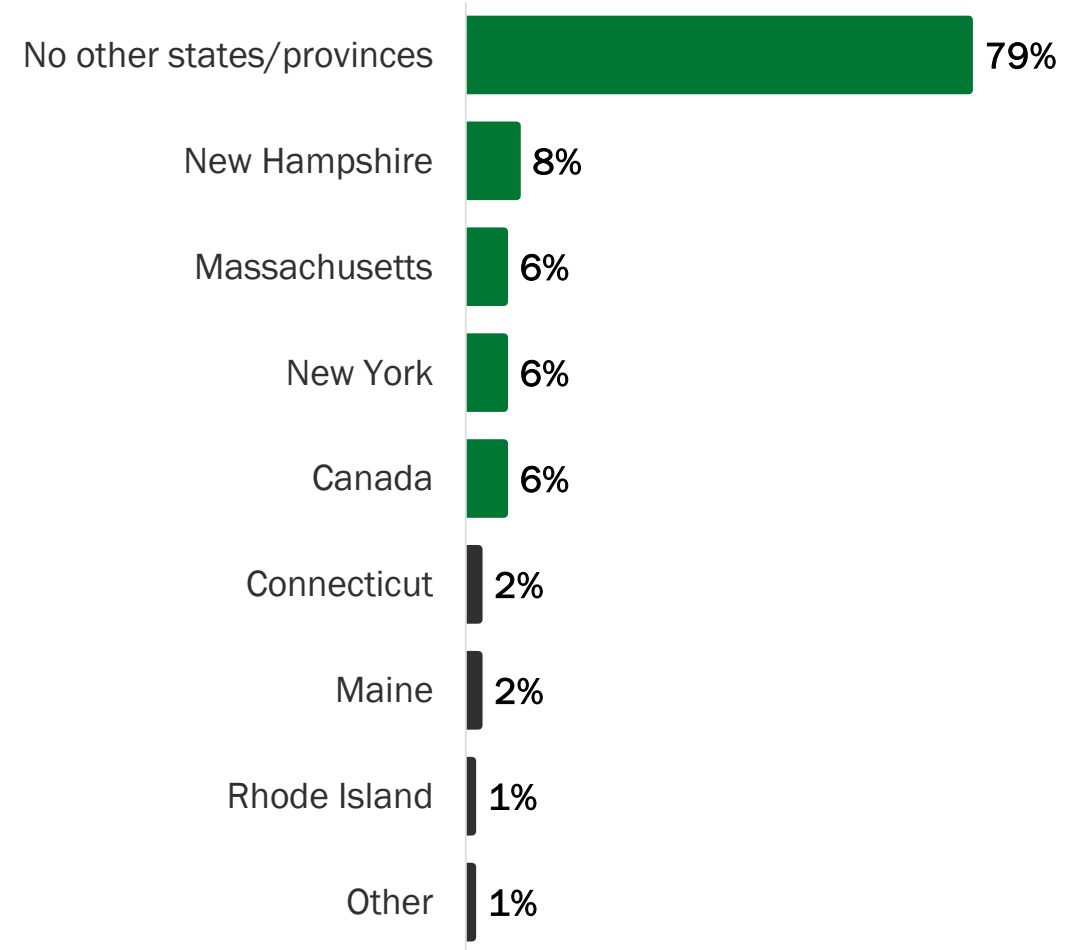
TOTAL TRAVEL PARTY SPENDING (CONT'D)



OTHER STATES & CANADA VISITED*

Vermont's winter visitors tend to seek out the state as their sole travel destination.

- » Nearly 4 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 to Canada



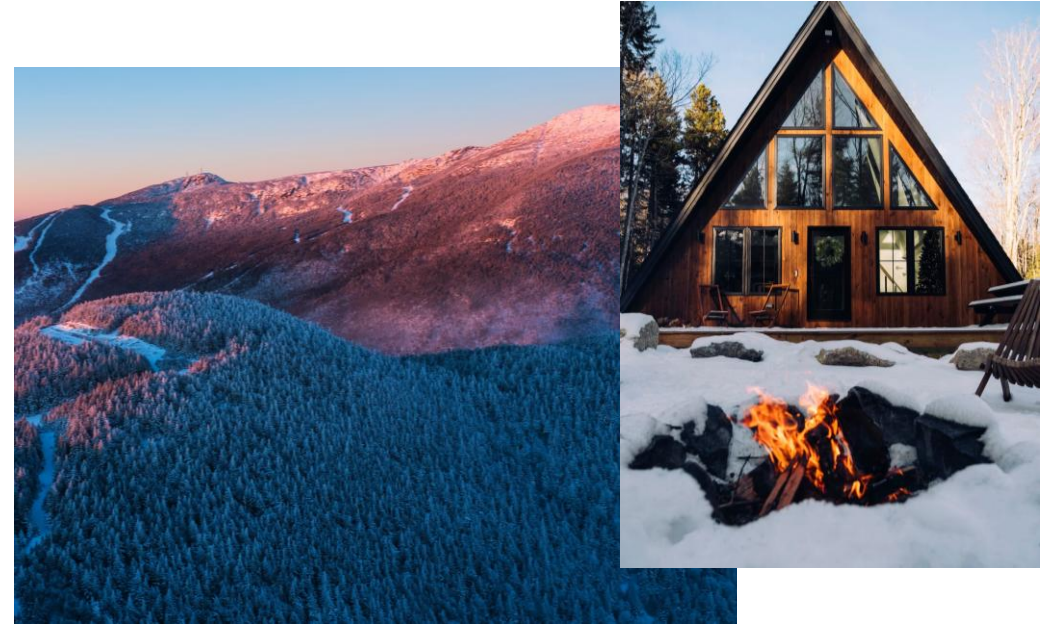
*What other states or Canada did you/do you plan to visit on this same trip? Multiple responses permitted.

TRIP EXPERIENCE SUMMARY

THE VISITOR EXPERIENCE

WHERE TO GO & WHAT TO DO?

Just as it drew them to the state in the first place, skiing dominates Vermont's winter visitor experience. They spend time in mountainous regions like the Stone and Okemo Valleys. They tend not to participate in multiple outdoor activities during their trip – or in indoor activities, for that matter.



VISITOR JOURNEY : POST-TRIP EVALUATION

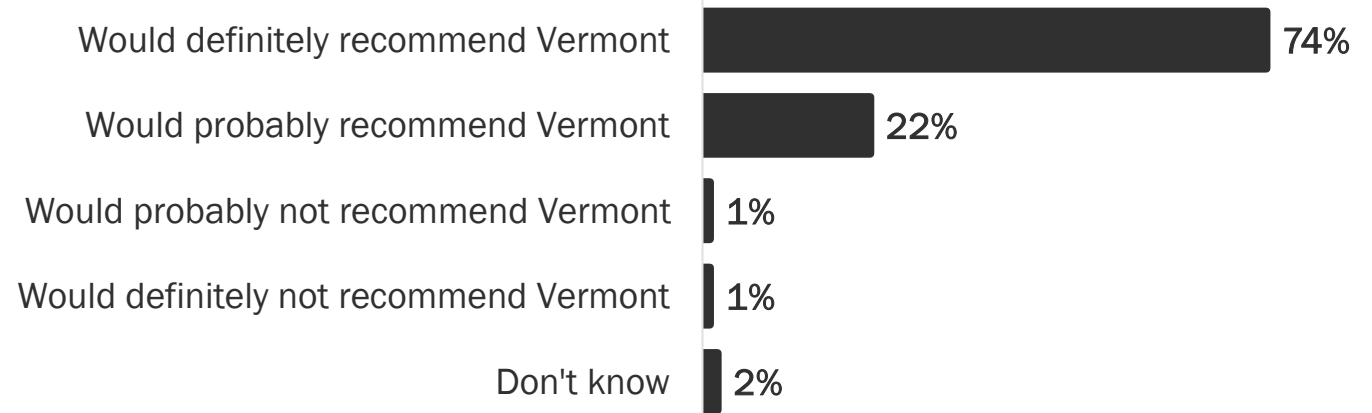


RECOMMENDATION & SATISFACTION

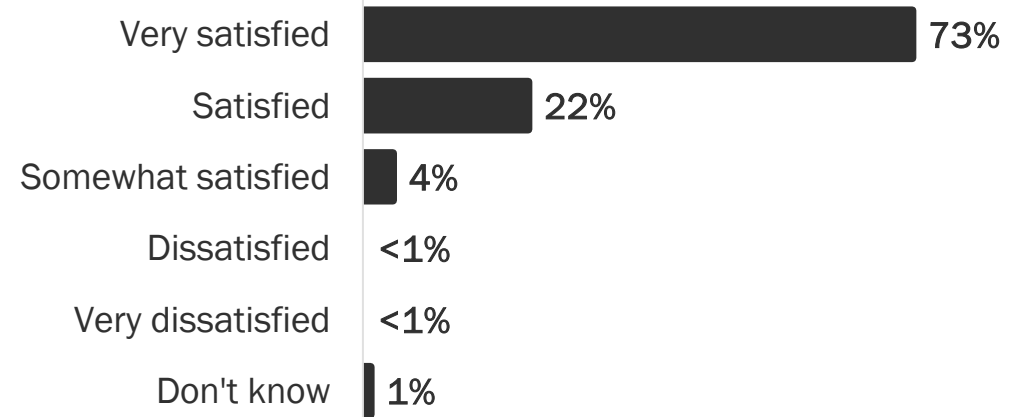
» **96%** of winter visitors **would recommend** that their friends and family choose Vermont as their destination for a future visit or vacation

» **95%** of winter visitors are **satisfied** with their visit to Vermont

Likelihood of Recommending Vermont*



Satisfaction with Visit**



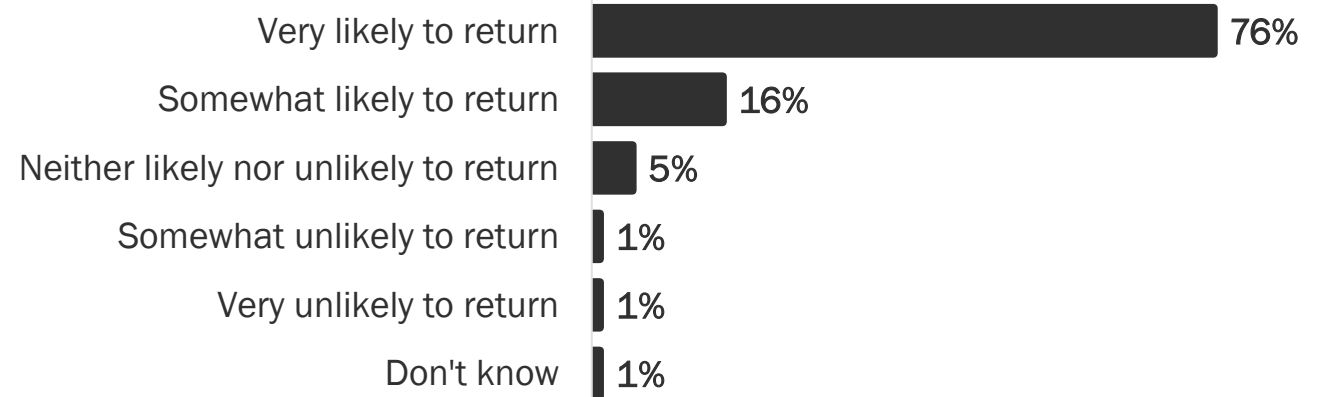
*Would you recommend Vermont to friends/family over other vacation areas?

**How satisfied are you with your visit to Vermont?

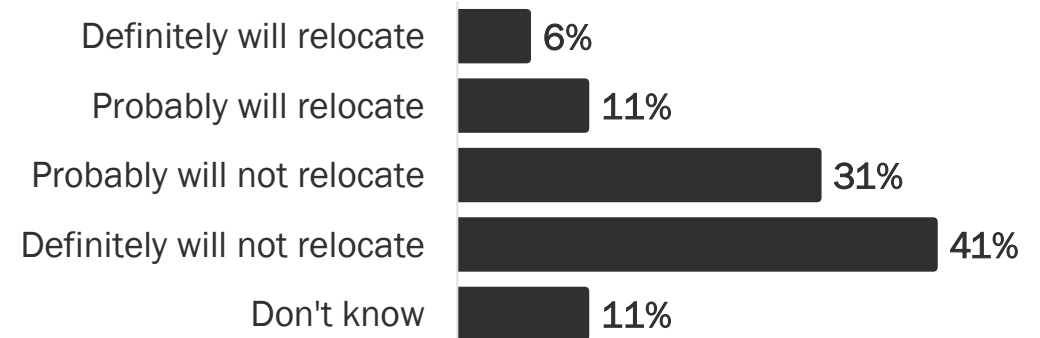
RETURNING & RELOCATING

- » **Over 9 in 10** visitors will **return** to Vermont for a future visit or vacation (over 3 in 4 are very likely to return)
- » **3%** of all visitors are unlikely to return to Vermont for the following reasons:
 1. Once is enough to see/do everything
 2. Prefer a variety of destinations
 3. Too expensive for what you get
- » **17%** of visitors **may relocate** to Vermont (6% will definitely relocate)

Likelihood of Returning to Vermont*



Likelihood of Relocating to Vermont**



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

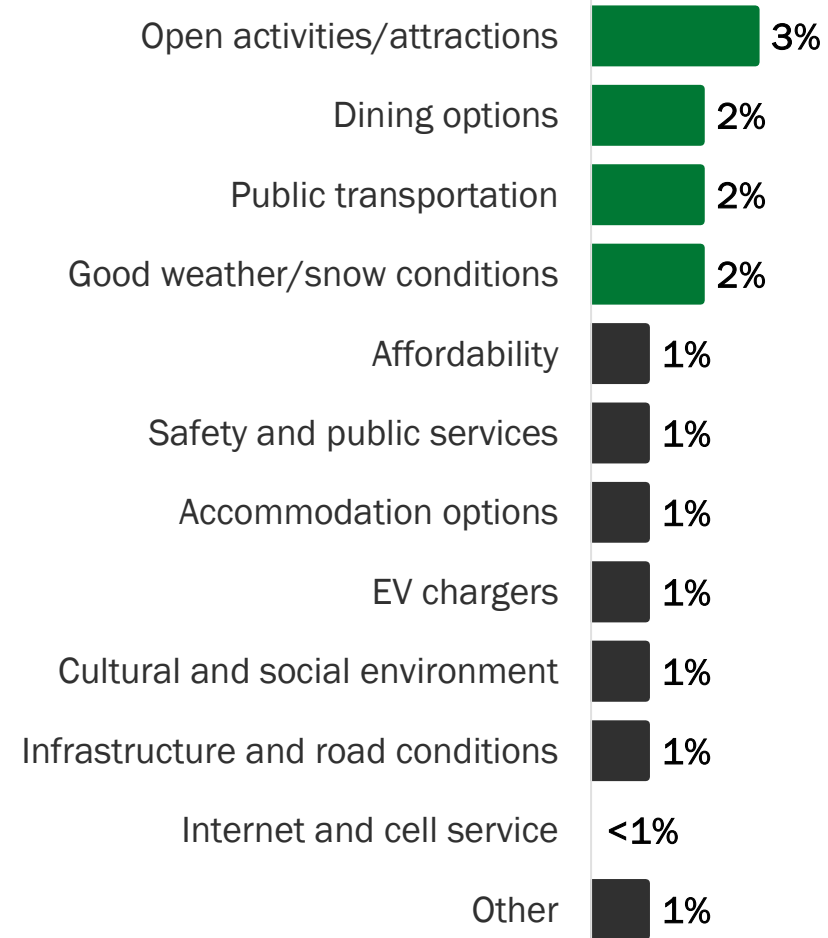
**How likely are you to relocate to Vermont as a resident?

MAKING VERMONT BETTER

Only 14% of winter visitors felt something was missing from their Vermont travel experience.*

- » 3% of all visitors wanted more diverse and engaging **entertainment and activities** and better communication about available activities
- » 2% of all visitors wanted more diverse **dining options** and extended restaurant operating hours
- » Another 2% mentioned a desire for more public **transportation**, public parking, and better walkability
- » 2% wished the **weather and snow conditions** had been better for snow activities during their trip

Missing from Vermont Travel Experience**

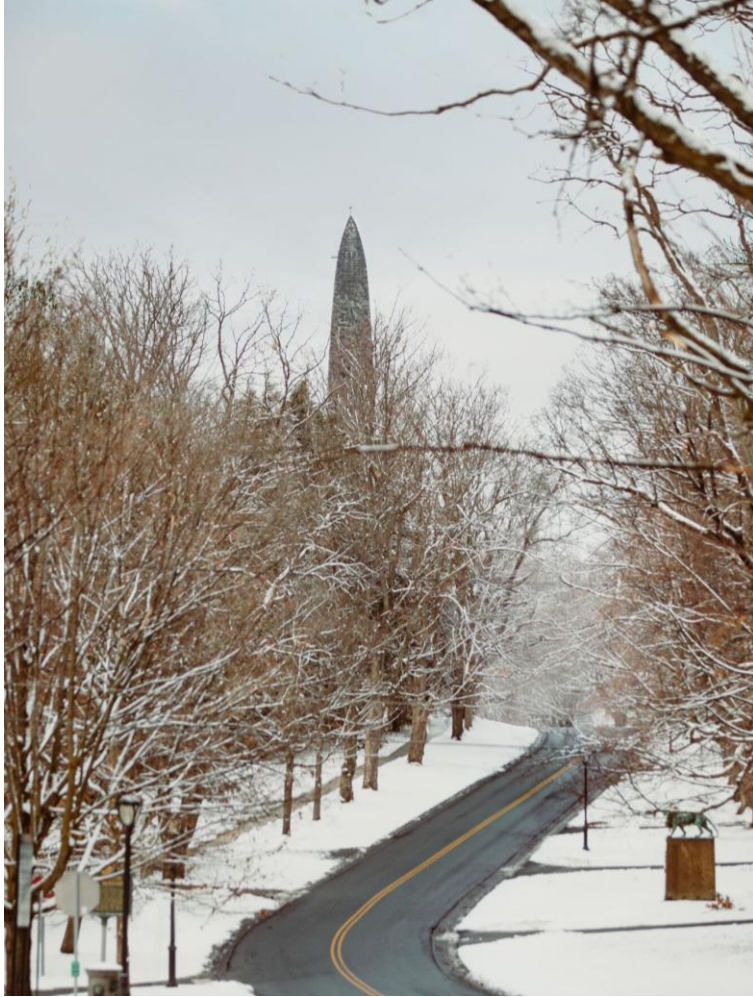


*Was anything missing that would make Vermont a better vacation destination?

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

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

PERCEPTIONS OF VERMONT*



*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)*



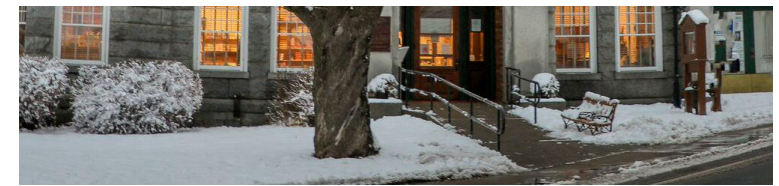
“Vermont is organic: relaxed, authentic, and down to earth.”



“This is quintessential New England. Lots of cool buildings, lots of history.”



“Vermont is beautiful year-round, but there’s just something special about this state in the winter.”



*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 compare Vermont in the winter to a postcard, a Hallmark movie, and an outdoor Disneyland. They call it bucolic, unhurried, cozy, and unspoiled. They especially love the food, craft beer, cider, shopping, and of course, the skiing.

Almost all winter visitors felt satisfied with their visit and would recommend the state to friends and family.

As one winter visitor put it, Vermont is “intentionally boring.” It is “a place where you can think.” The food is “startlingly good,” and the skiing is “the best anywhere.” And it is these things that keep drawing visitors back year after year.



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 winter season.



SEASONAL COMPARISONS FINDINGS

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

Pre-Visit

- » Spend the least time planning their trips
- » Use the fewest sources to plan their trips
- » Are more often leisure visitors traveling for outdoor recreation
- » Are less likely to be in Vermont for any other reason
- » Most likely to recall seeing advertising for Vermont and most likely to be influenced to visit by ads

Traveler Profile

- » Most likely to travel from nearby
- » Travel in the largest parties; tend to be younger, male and more racially diverse
- » Most likely to be repeat visitors
- » Most likely to drive to the state instead of fly
- » More likely to be in the state only for the day

Trip Experience

- » More often spend the night in the northwest-central part of the state
- » Paid visitors most often spend the night in vacation rentals
- » Have the highest share of visitors doing outdoor activities
- » Are more likely to visit Ben & Jerry's than other attractions
- » Have the highest daily spending
- » Are least likely to visit other states during their trips

Post-Trip Evaluation

- » Have average trip satisfaction and likelihood of recommending Vermont to friends or family

REGIONAL COMPARISONS

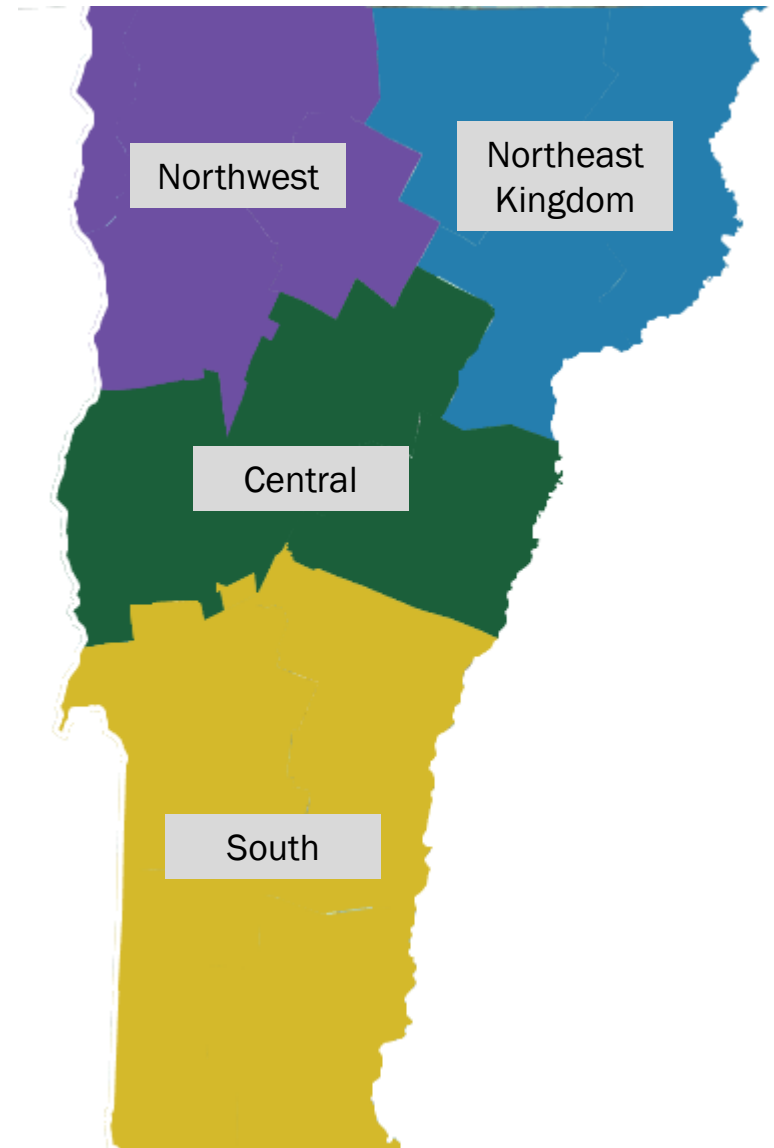
INTRODUCTION: REGIONAL COMPARISONS

REGIONAL COMPARISONS: WINTER VISITORS

This section looks at how winter 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 winter visitors.

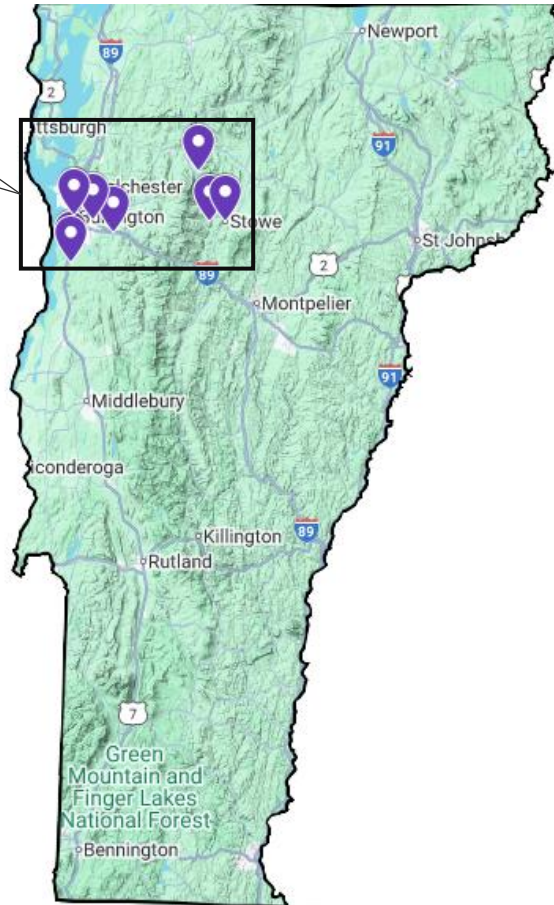
Each region is made up of three to four counties:

- 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
- Williston North Welcome Center
- Vermont Teddy Bear Factory
- Trapp Family Lodge
- Downtown Stowe
- Shelburne Museum
- Smugglers' Notch Resort

Northwest Events

- Shelburne Winter Lights
- BTV Winter Market

NORTHWEST*

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

Pre-Visit

- » Are less likely to plan their trips at the last minute
- » 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 relaxing atmosphere or culture/history
- » Leisure visitors are more often in the state for local food or simply to relax; outdoor visitors are less often in the state to ski

Traveler Profile

- » Are more likely to be traveling from the West and less likely from the Middle Atlantic
- » First-time visitors are more likely to be in the state on a 50 states tour or for its scenic beauty

Trip Experience

- » Take the longest trips – often 5+ nights – and are most likely to stay in hotels
- » Are more likely to spend time sightseeing or shopping; outdoor rec visitors are more likely to be hiking
- » Have average daily spending

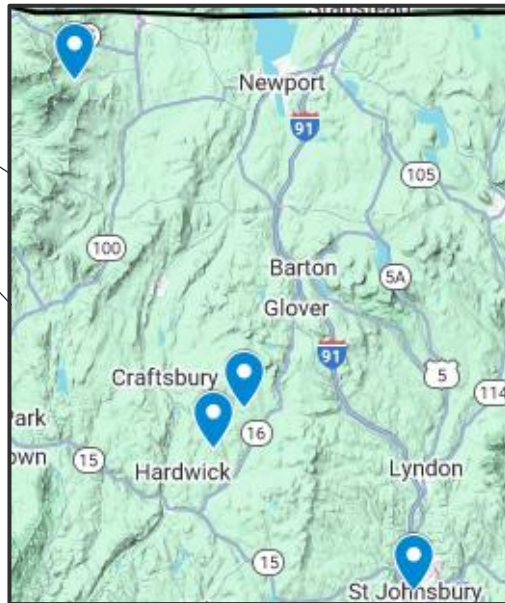
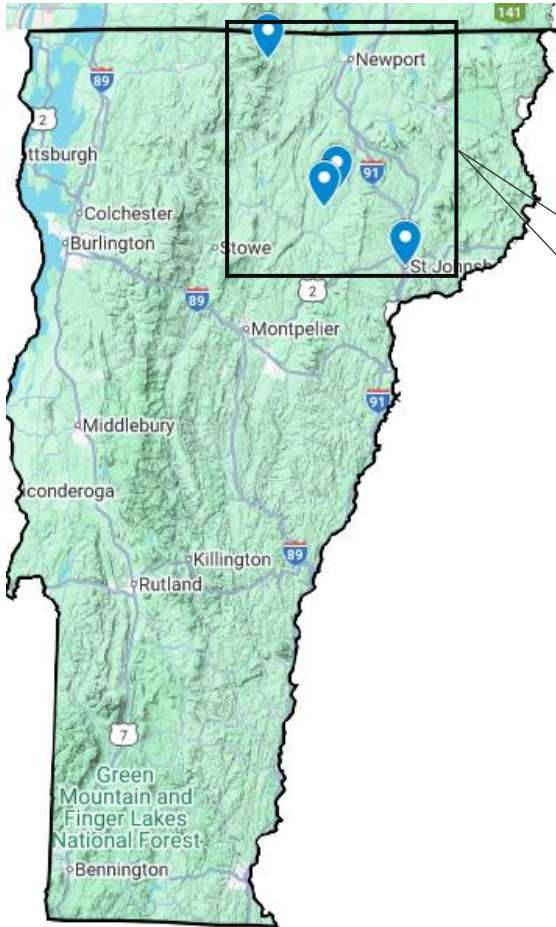
Post-Trip Evaluation

- » Report lower 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
- Fairbanks Museum & Planetarium
- Jay Peak Resort
- Highland Center for the Arts

Northeast Kingdom Events

- Highland Center Winter Market
- Highland Center Snowlights
- Highland Center Curds & Curling

NORTHEAST KINGDOM*

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

Pre-Visit

- » Rely more on vacation rental websites and word of mouth when planning their trips
- » Have a higher share of leisure visitors, particularly those who are in the state for outdoor rec or sampling craft beverages
- » Choose Vermont over other destinations more for its outdoor activities or its affordability
- » See more advertising on social media and in online articles

Traveler Profile

- » More often travel from Canada and New England; more often with friends
- » Tend to be younger and male and travel in the largest parties

Trip Experience

- » More often spend time sampling Vermont's food and drinks and participating in outdoor activities, particularly skiing
- » Have the lowest daily spending

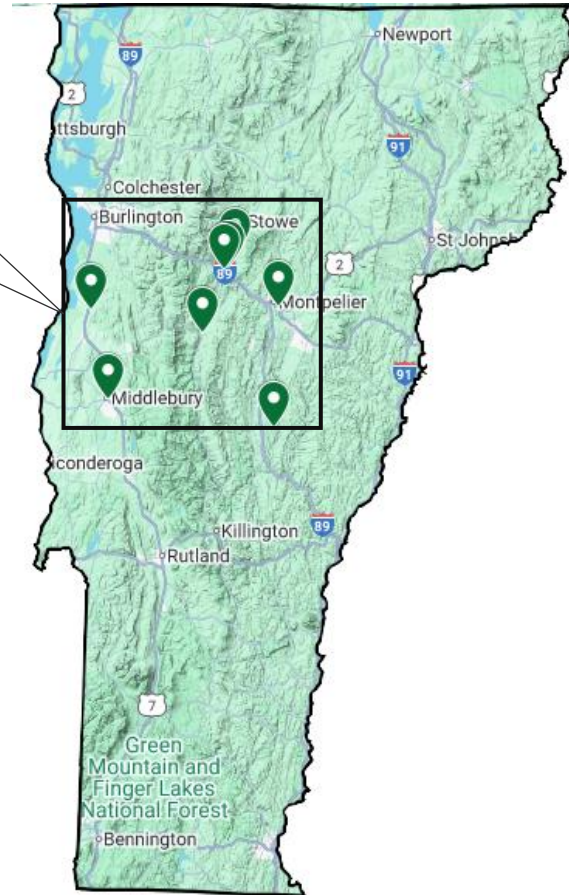
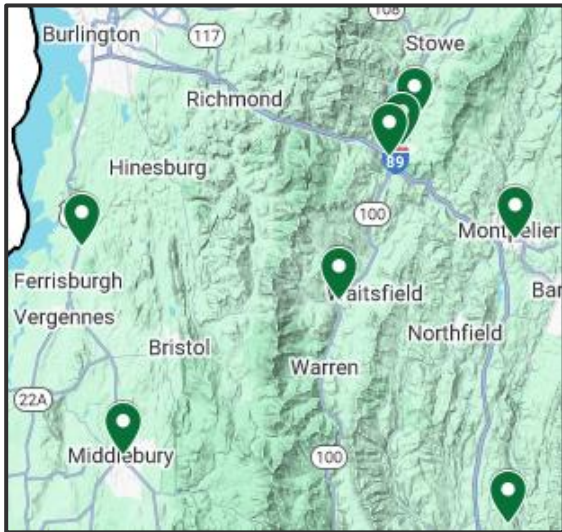
Post-Trip Evaluation

- » 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
- Dakin Farm
- The Middlebury Inn

Central Events

- Waterbury Winterfest
- Silloway Maple Open House

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

Pre-Visit

- » Are more likely to start planning their trip and book accommodations 1-2 months before the trip
- » Are more likely to spend time on hotel and mapping websites while planning their trips
- » Have a higher share of visitors in the state to see friends and family
- » Leisure visitors are more likely to be in Vermont for the food, attractions, and just relaxing
- » Choose Vermont over other destinations for its relaxing atmosphere or new experiences

Traveler Profile

- » First-time visitors are drawn to the state by online recommendations or the desire to experience somewhere new
- » More likely to be female, to be staying in Vermont for 1-2 nights, and to be staying with friends or relatives

Trip Experience

- » Spend more time enjoying local food and drinks, sightseeing, and shopping
- » Have average daily spending

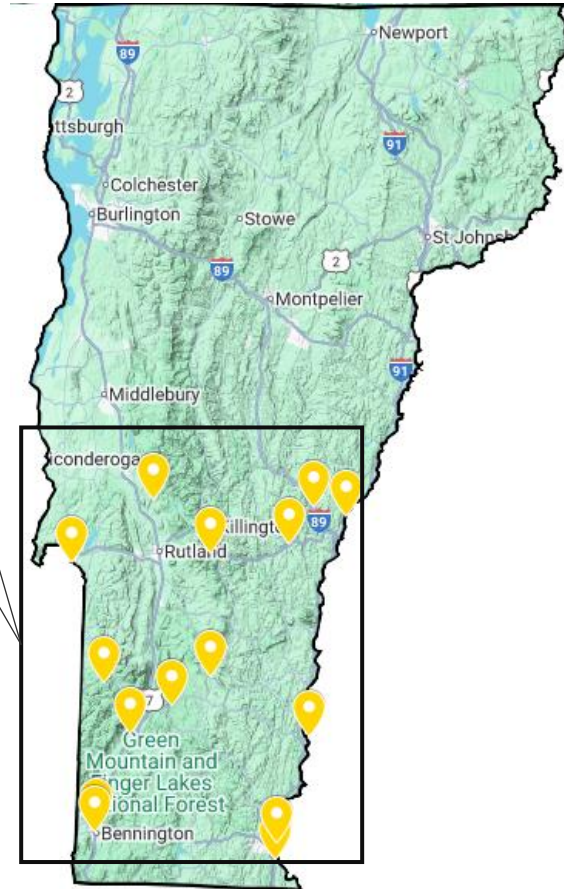
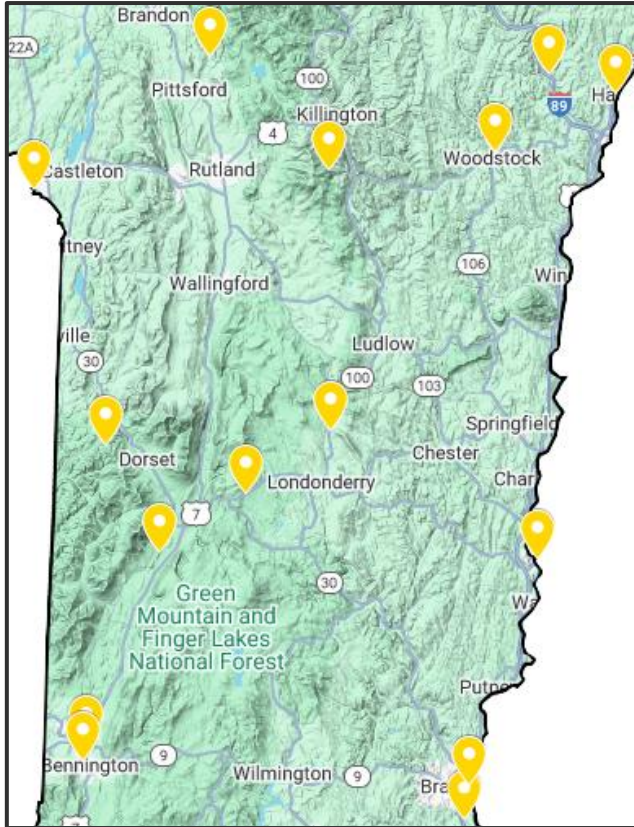
Post-Trip Evaluation

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

*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

- Sharon Welcome Center
- Fair Haven Welcome Center
- Guilford Welcome Center
- Bennington Welcome Center
- Billings Farm & Museum
- Bennington Museum
- Vermont Country Store Weston
- Vermont Country Store Bellows Winters
- King Arthur Baking Company
- Downtown Brattleboro
- Killington Resort
- Bromley Mountain Resort
- Hildene
- Baird Farm

South Events

- Killington Cup
- Baird Farm Maple Open House
- Merck Forest Maple Open House

Compared to other regions of the state, winter 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 traveling for similar reasons to the average visitor: a vacation or to see friends/family
- » Leisure visitors are more often in the state to shop; outdoor rec visitors, to ski
- » Choose Vermont over other options for its scenic beauty or its new experiences

Traveler Profile

- » Are more likely to be traveling from the Middle Atlantic and less likely to be coming from Canada
- » Take the shortest trips, are more often male and over 65, tend to travel as a couple, and have higher incomes
- » Are more likely to have visited Vermont many times

Trip Experience

- » Have the highest daily spending, but tend to be in the state only for the 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: WINTER

These clusters reflect how annual personas manifest under winter conditions: Winter compresses visitor behavior. People come for fewer, more similar reasons.

Local Outdoor Regulars



Winter Cluster A:
Focused outdoor
recreators

- 82% of winter visitors
- Purpose-driven winter trips centered on outdoor adventure
- Highly repeat, nearby visitors relying on familiarity

Social & Cultural Visitors



Winter Cluster B:
Leisure-oriented social
visitors

- 18% of winter visitors
- Leisure trips anchored by people and shared experiences
- Mix winter activities with dining and social time

LOCAL OUTDOOR REGULARS: WINTER

In the winter, local outdoor regulars:

- » Travel in similar-sized parties as they do annually, reinforcing that winter trips are habitual rather than socially driven
- » Shift away from day trips toward overnight stays, often using resorts or vacation rentals to support winter activities
- » Split between staying in one area and moving across regions, reflecting flexibility based on snow conditions and resort locations
- » Engage in outdoor activities that feel more adventurous and purposeful, with less emphasis on relaxation than in other seasons
- » Remain leisure travelers overall, but with a much stronger focus on outdoor recreation, and limited interest in non-outdoor activities
- » Place greater emphasis on dining and craft beverages, using food to complement active winter days
- » Rely on familiarity rather than planning, with little need for research or trip-building
- » Are less likely to notice advertising, but when they do, messaging is just as likely to influence decisions
- » Continue to draw heavily from nearby markets, including Canada, consistent with winter access and tradition
- » Remain highly repeat-oriented, reflecting routine use of Vermont's winter assets
- » Report steady, average satisfaction, driven by meeting expectations rather than discovering something new

Key Takeaway: In winter, local outdoor regulars become highly activated around adventure-driven outdoor use.

SOCIAL & CULTURAL VISITORS: WINTER

In the winter, social and cultural visitors:

- » Continue to travel as a couple most often and stay mostly in personal accommodations or in hotels/resorts
- » Continue to move across multiple regions, often following social plans
- » Engage in outdoor activities that feel more adventurous, reflecting winter conditions rather than a shift in core motivation
- » Show a stronger emphasis on leisure travel and less focus on events or special occasions, using winter as a general getaway rather than an event-anchored trip
- » Rely on similar planning sources as annually, especially advice and coordination with friends and family
- » Demonstrate similar awareness of advertising, with slightly greater influence when messaging aligns with winter experiences
- » Draw more heavily from nearby markets, with less pull from southern regions during winter months
- » Skew slightly more toward repeat visitors, reflecting established social ties and familiarity with winter travel patterns
- » Report similarly high satisfaction, suggesting winter trips meet expectations built around people, place, and season

Key Takeaway: In winter, Social & Cultural visitors shift toward leisure trips that blend winter activities with time together.

VERMONT TOURISM

Winter 2024-2025 Visitor Tracking Report

November 30, 2024 – March 31, 2025

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