RSG INC.
RESOURCE SYSTEMS GROUP, INC.

# Opportunities for VT Winter Vacation Providers

Dan Weinstein

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# Vermont Brand Study

RSG partnered with the State of Vermont to gather information from vacationers from key markets to inform opportunities for the State and vacation providers in Vermont.

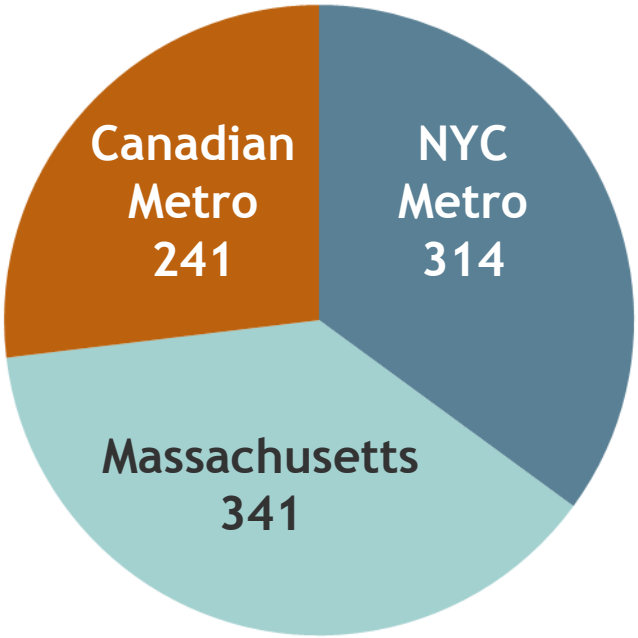
- **Study Background**
- **Opportunities for Vermont Vacation Providers**

# Who Did We Talk To?

**Vermont Vacation Providers**

235

**Out-of-State Vacationers**




n = 896

**Vermont Residents / Vacationers**

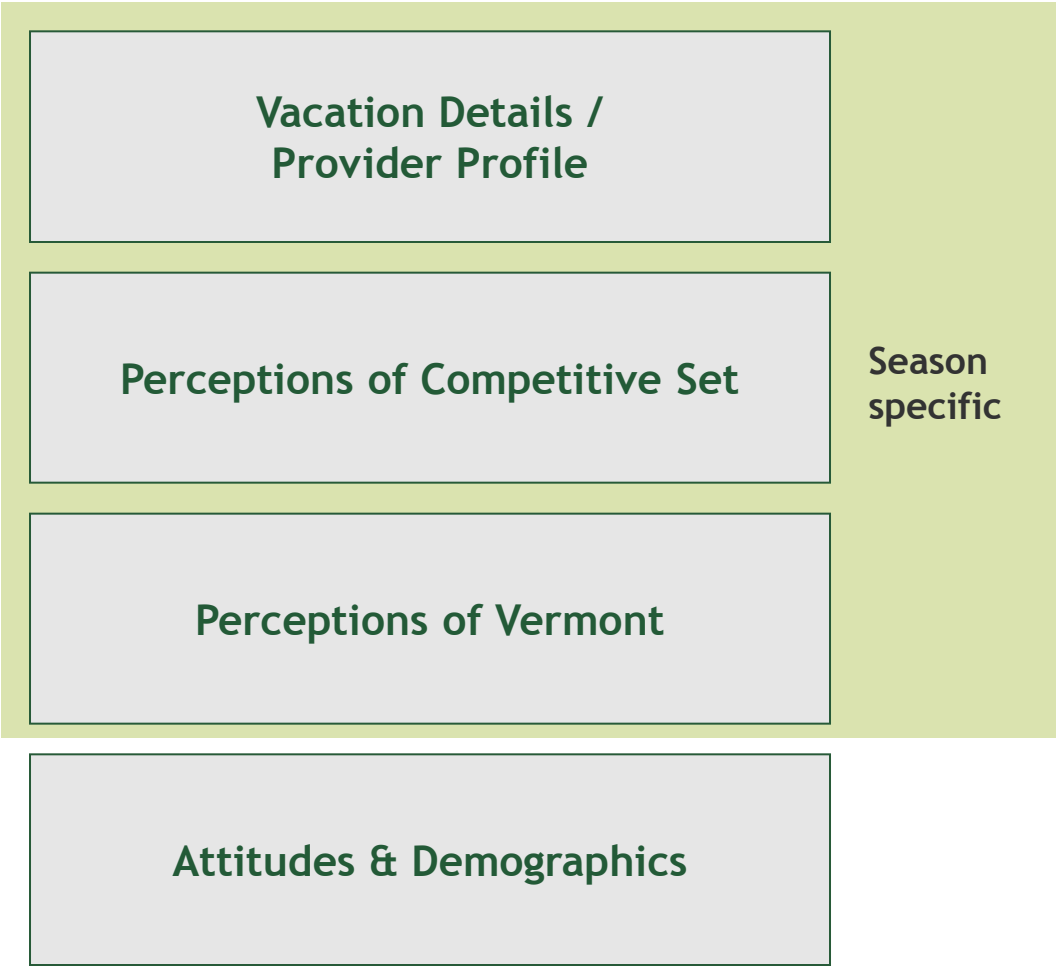
145

**For the purposes of this study, a "vacation" was defined as follows:**

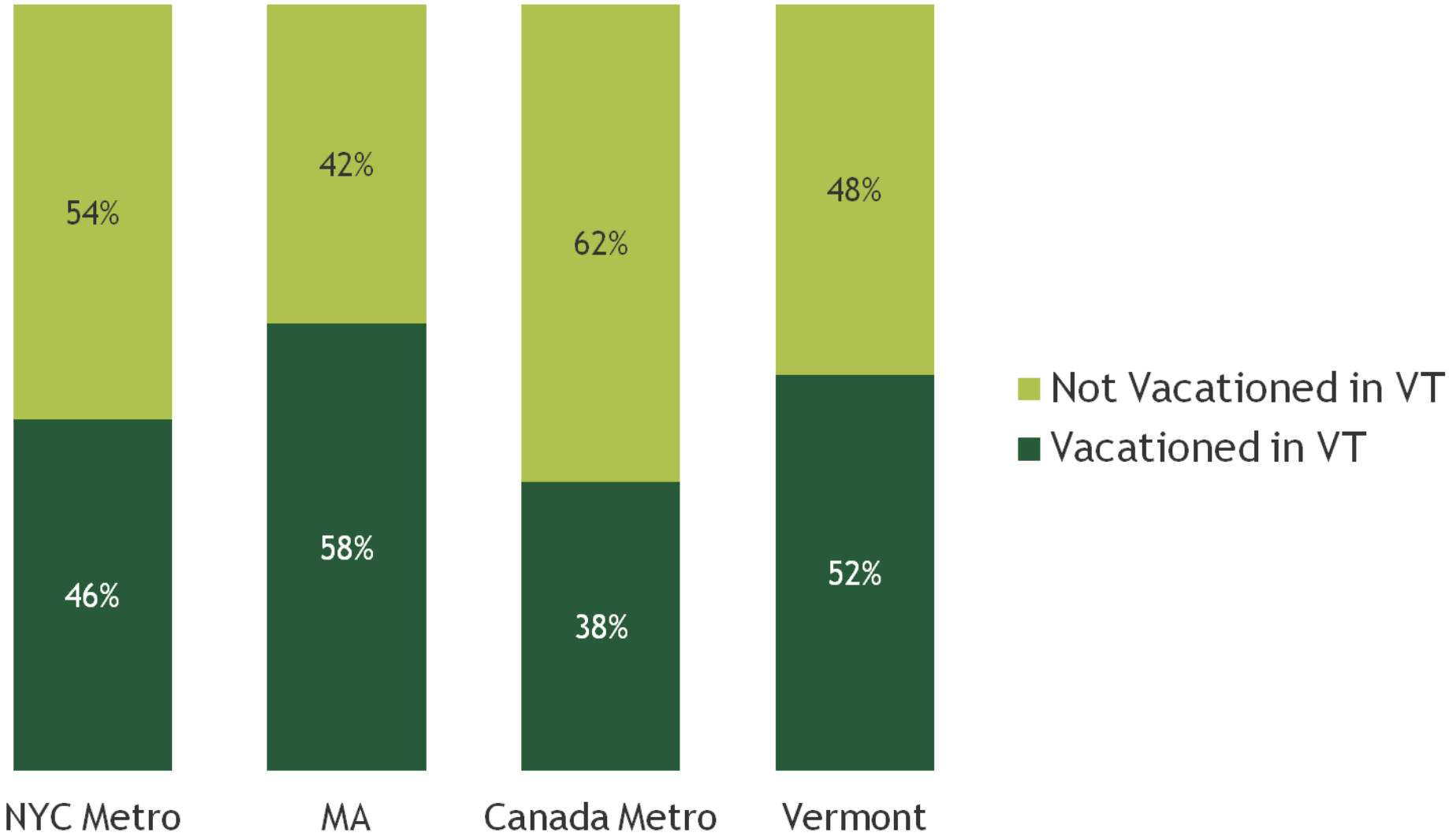
*"any day or overnight trip outside of your usual travel or commuting pattern, where you participated in any leisure/non-business activities"*

# What Did We Ask Them?

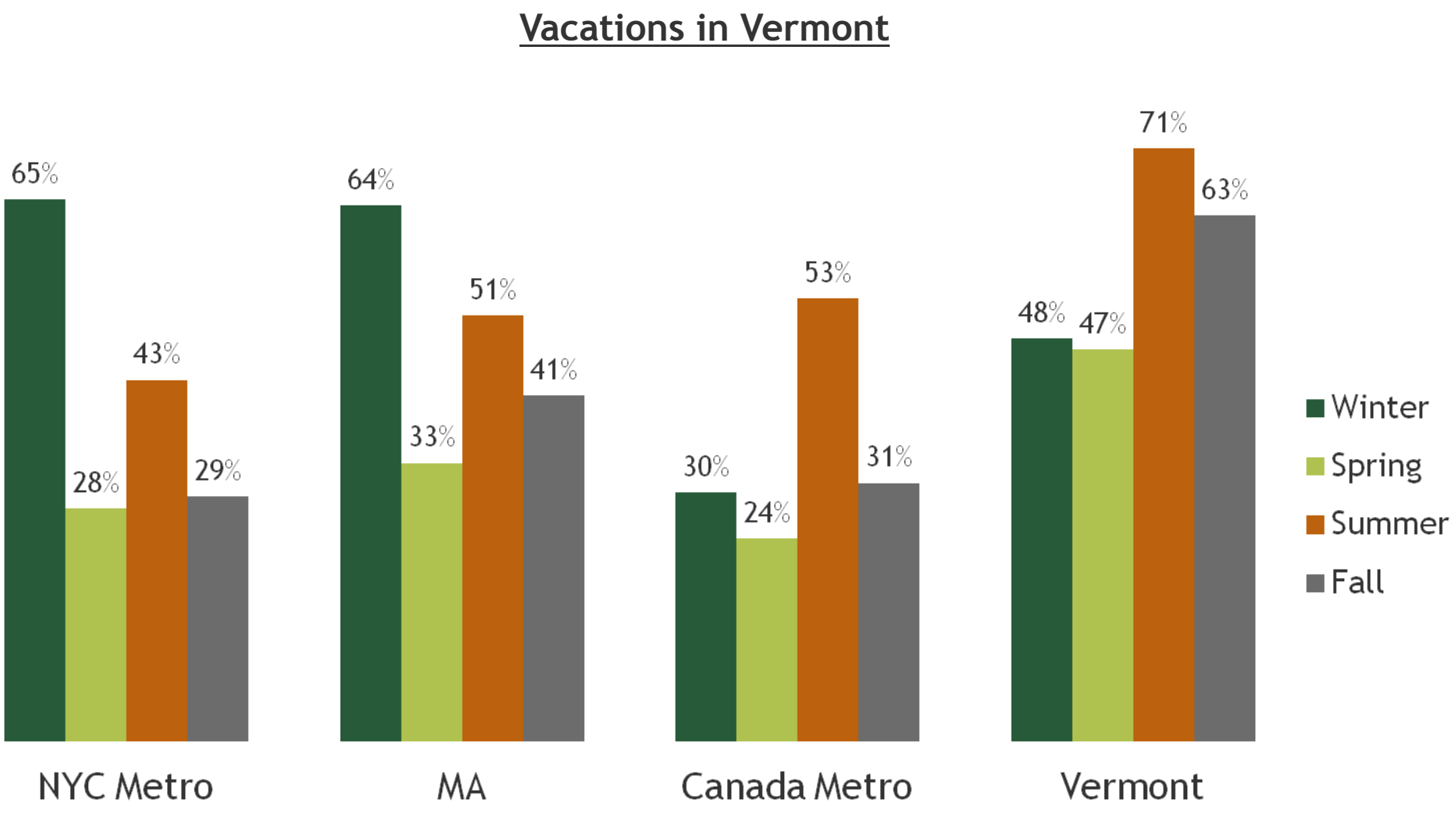
Survey participants were asked a variety of questions to better understand the types of vacations they take, their perceptions of Vermont and competitive destinations as well as relevance of particular images and wording to Vermont.



# How Many of Them Have Been To Vermont?

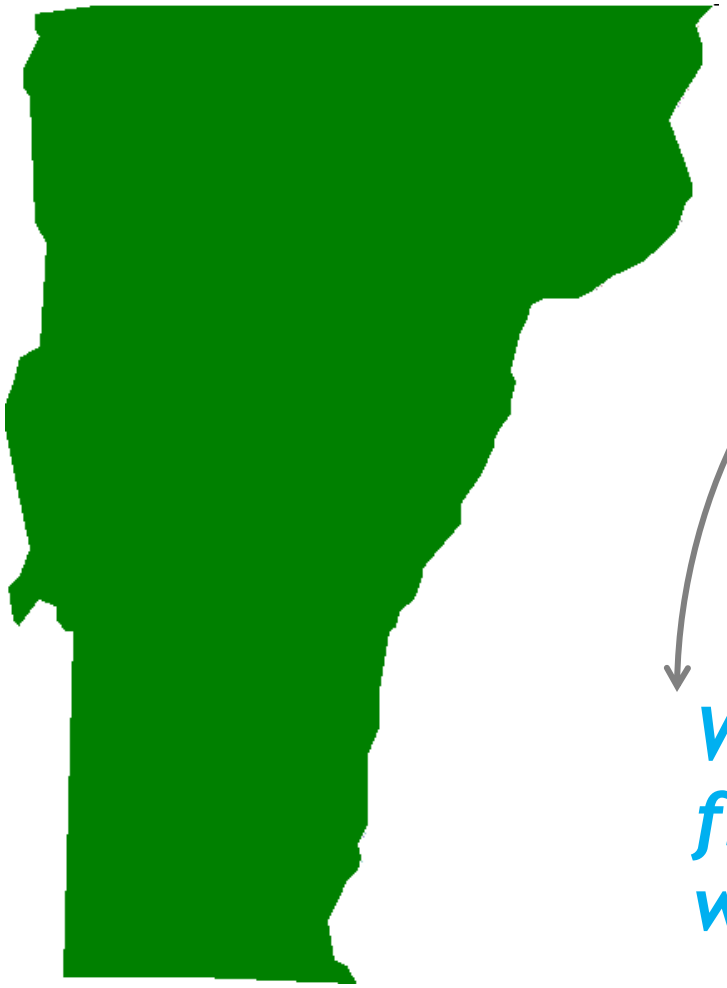


# When Do Vacationers Come to Vermont?




**Remember, "vacation" was defined as:** *"any day or overnight trip outside of your usual travel or commuting pattern, where you participated in any leisure /non-business activities"*

# Vermont Brand Study



- Study Background
- **Opportunities for Vermont Vacation Providers**

***Will focus only on responses from people who described a winter vacation***

# What Do Winter Vacationers Look Like?

**Age**

- 19% - 30 or younger
- 20% - 31 to 40
- 25% - 41 to 50
- 23% - 51 to 60
- 13% - 60+

**Gender**

- 51% - Female

**Marital**

- 24% - Single
- 67% - Married
- 9% - Other

**Income**

- 61% - less than $100K
- 39% - $100K+

**Employment**

- 78% - Employed
- 9% - Retired
- 5% - Homemaker
- 5% - Unemployed
- 3% - Student

**Education**

- 10% - High school diploma or less
- 19% - Some college
- 45% - College
- 27% - Graduate school

**Seen As**

- More than 70% want to be seen as “active”, “independent”, “responsible”, “adventurous”, “natural”

# What Do Their Winter Vacations Look Like?

**Length of Stay**

- 6% - day trip
- 8% - 1 night
- 28% - 2 nights
- 39% - 3-6 nights
- 12% - 1 to 2 weeks
- 4% - 2+ weeks

**Spend at Destination**

- 7% - $50 to $99
- 29% - $100 to $299
- 43% - $300 to $999
- 21% - $1,000+

**Lodging**

- 43% - Hotel / Motel
- 12% - B&B / Inn
- 32% - House / Condo
- 3% - Campground
- 10% - Other

**Activities on Vacation**

- 63% - Outdoor
- 67% - Relax
- 53% - Shopping
- 34% - Other

**Companions**

- 66% - Spouse
- 29% - Children
- 27% - Friends
- 8% - Vacationed alone

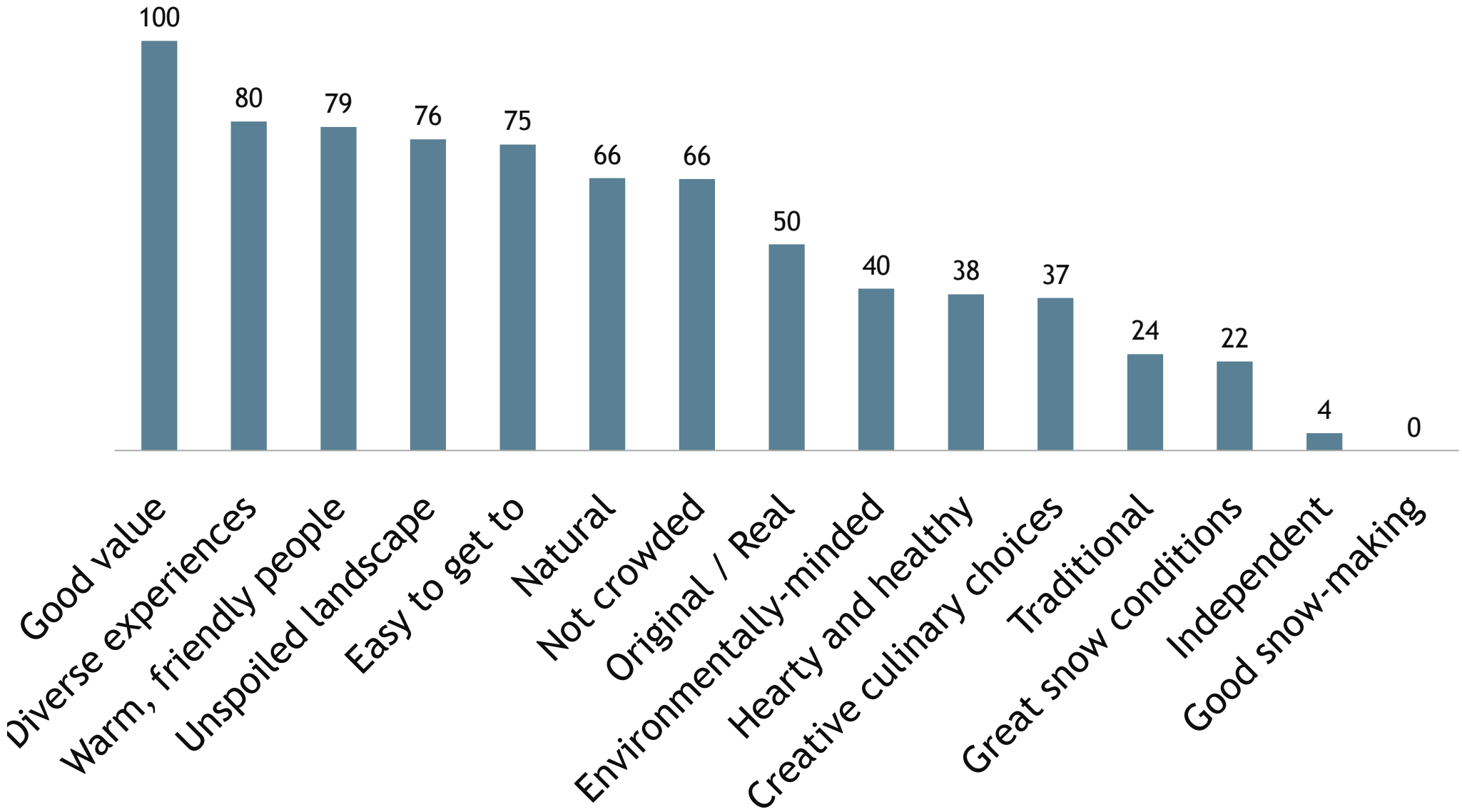
**"Ski" Activities**

- 32% - Alpine ski
- 13% - Snowboard
- 6% - Nordic ski
- 3% - Telemark ski

# Opportunities for Vermont Vacation Providers

- Focus on the more “important” vacation attributes
- Emphasize Vermont’s unique attributes within the competitive set
- Incorporate images that are relevant to Vermont
- Incorporate messaging that is relevant to Vermont
- Tailor brand / marketing to particular markets
- Target people who haven’t vacationed in Vermont

# Focus on the "important" vacation attributes




Scale = relative degree of importance

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# Emphasize Vermont's unique attributes

## Competitive Set For Winter Vacations:

- Vermont
- New Hampshire
- Maine
- The Berkshires
- The Poconos
- The Adirondacks
- West Coast
- The Rockies
- Eastern Canada
- Western Canada

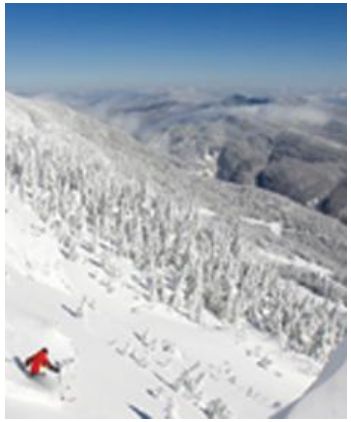
# Emphasize Vermont's unique attributes

| Co-owned | Owned | Led | Open |
|---|---|---|---|
| ▪ Natural (VT, ME, Rockies) | | ▪ Offers diversity of experiences (W. Coast) | ▪ Good value<br>▪ Warm, friendly people<br>▪ Unspoiled landscape<br>▪ Easy to get to<br>▪ Not crowded |
| | | ▪ Original / real (VT) | |
| | | ▪ Environmentally-minded (VT) | ▪ Hearty and Healthy<br>▪ Creative culinary choices |
| | ▪ Great snow conditions (Rockies) | | ▪ Traditional |
| | | ▪ Good snow-making (VT) | ▪ Independent |

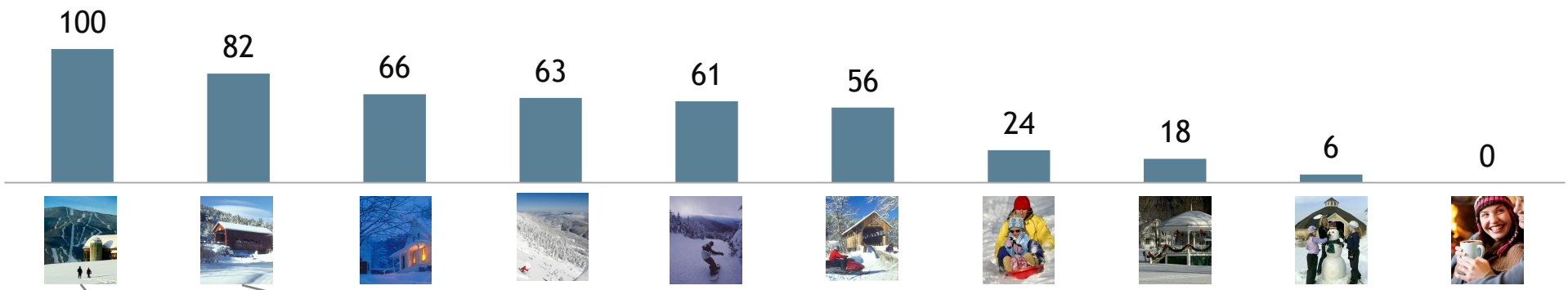
Importance

Openness

# Incorporate images that are relevant to Vermont



# Incorporate images that are relevant to Vermont



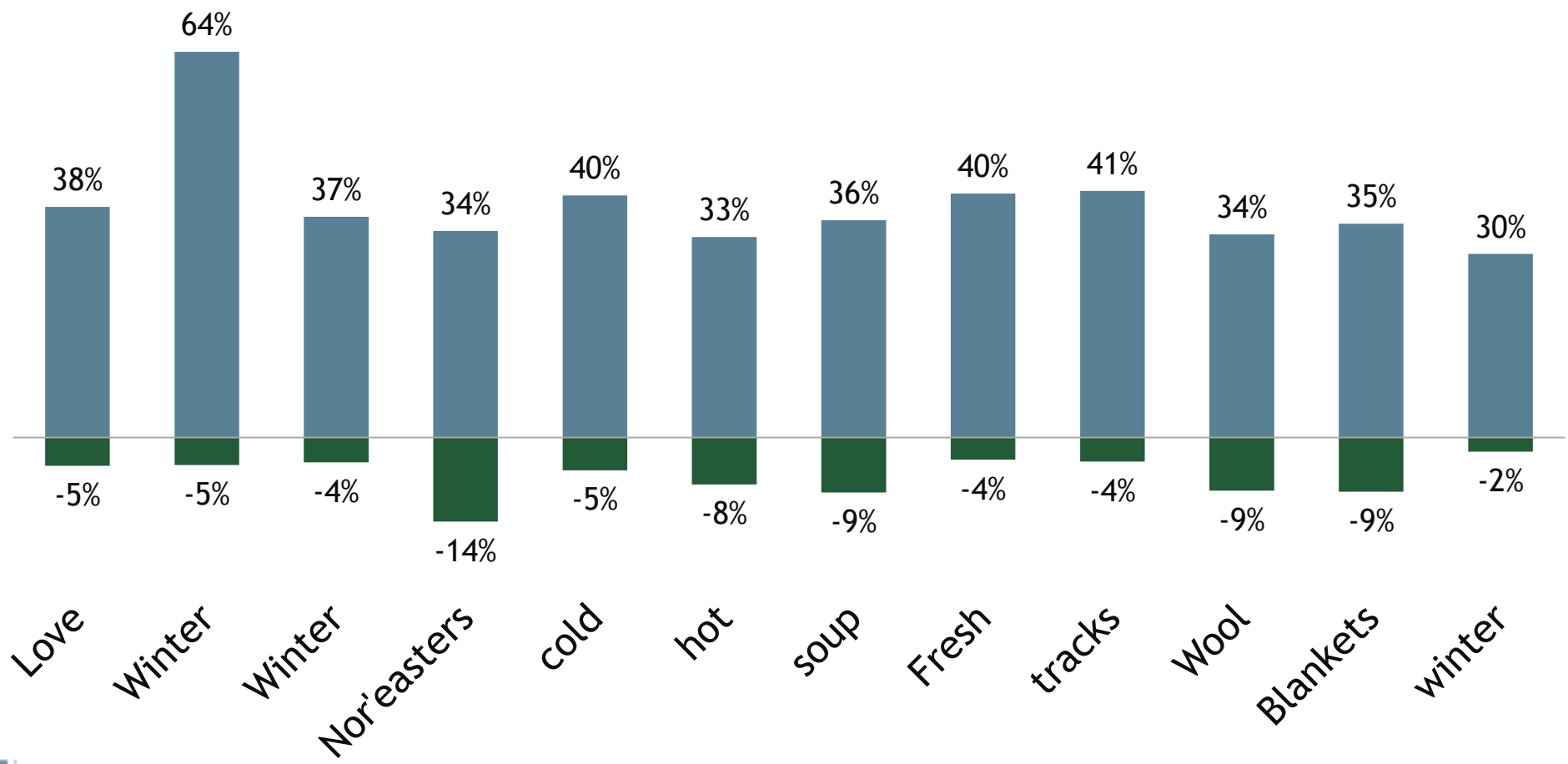

Scale = relative degree of importance

## Most Relevant to VT

## 2nd Most Relevant to VT

# Incorporate messaging that is relevant to Vermont

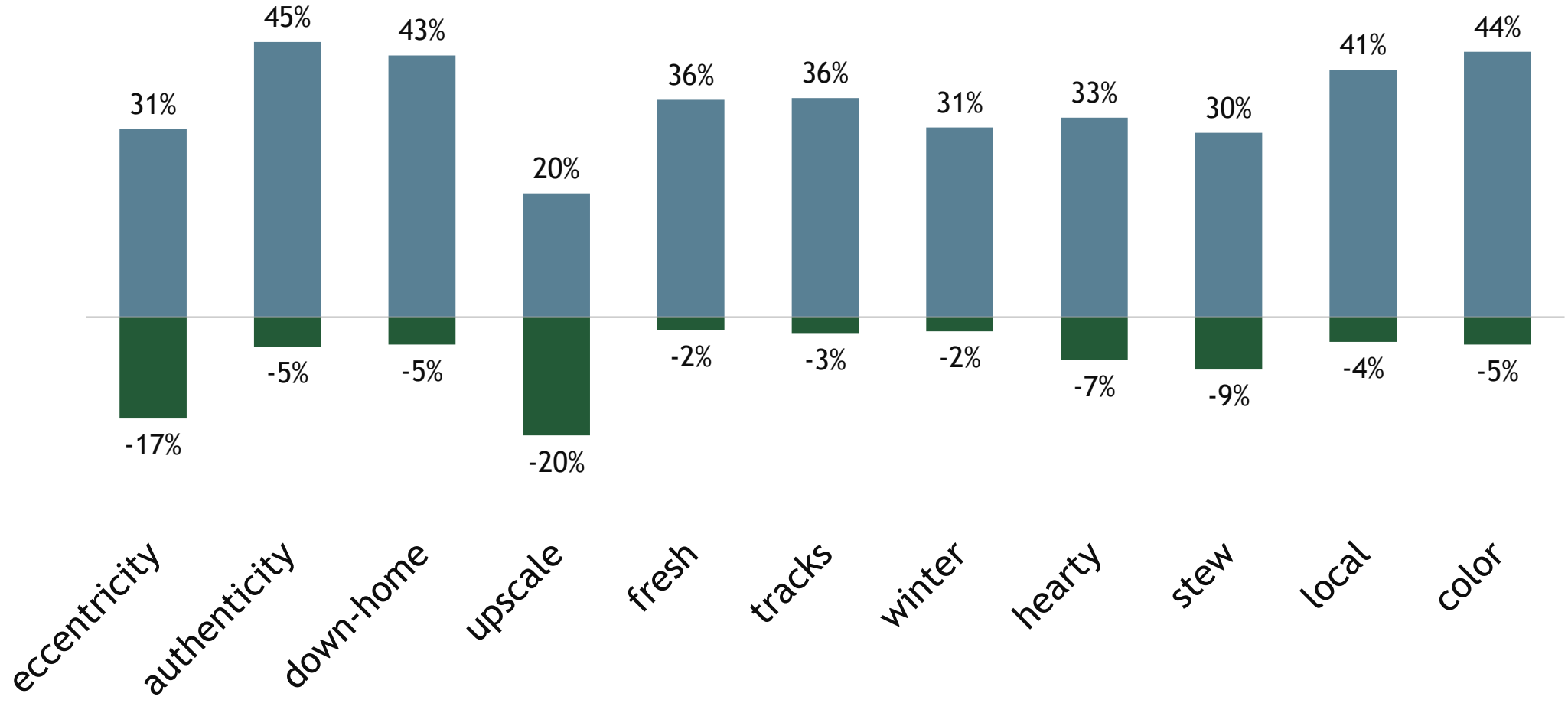
**Love Winter.**
**We're Vermonters and we love Winter. Epic Nor'easters. The tingle of cold on our cheeks. Steaming bowls of hot soup. Fresh tracks. Heavy Wool Blankets. We love how winter in Vermont makes us feel and for all the ways there are to enjoy it.**




% of respondents who felt the word was relevant / not relevant to VT

# Incorporate messaging that is relevant to Vermont

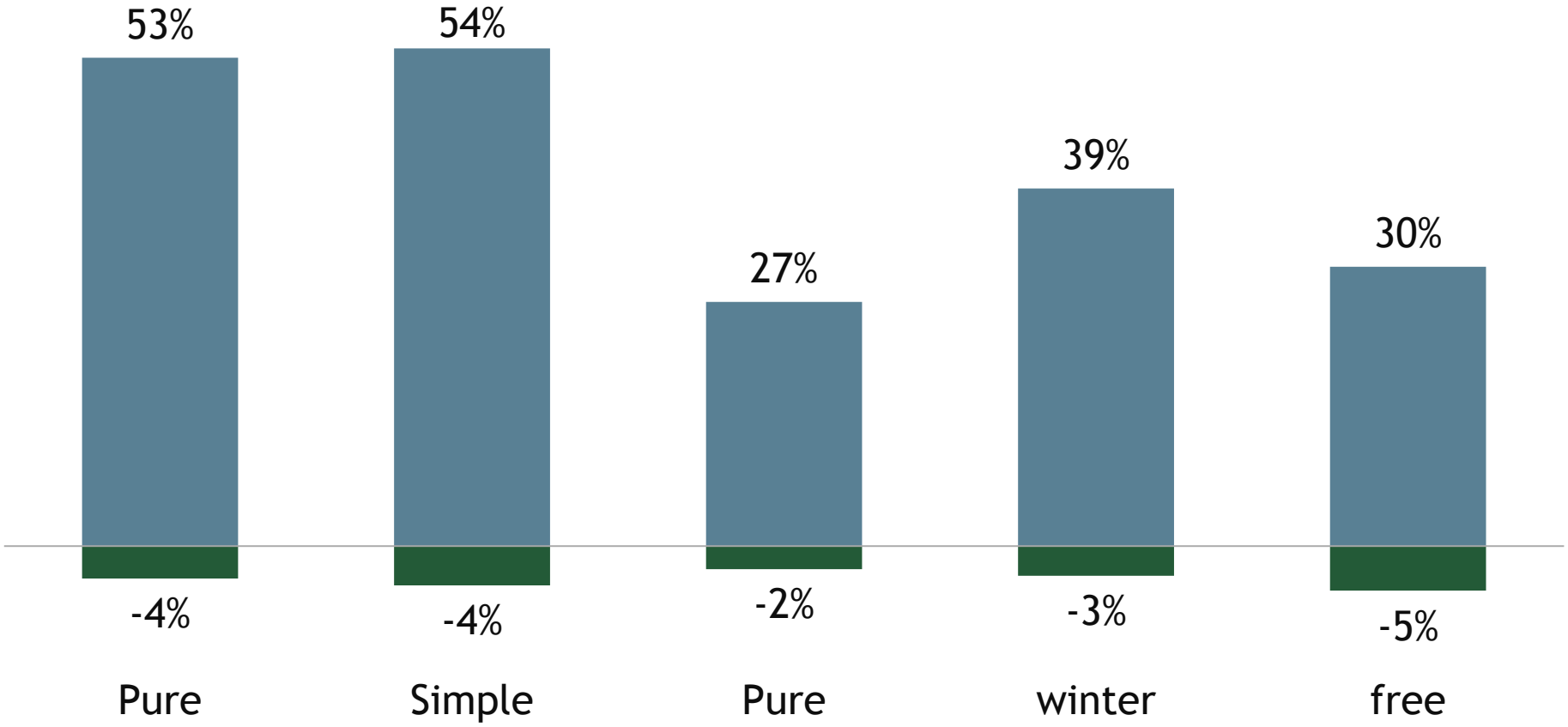
**Vermont Winter. It's all True.**
**Whether you like eccentricity or authenticity, down-home or upscale, fresh tracks or fresh ideas, winter in Vermont is a hearty stew to which everyone gets to add their own ingredients. In Vermont, local color comes in every shade imaginable.**




% of respondents who felt the word was relevant / not relevant to VT

# Incorporate messaging that is relevant to Vermont

**Vermont Winter. Pure and Simple.**
**Pure and simple, Vermont winter is the best of everything you remember combined with the best of what's to come. Where you're free to come as you are and be who you want.**




% of respondents who felt the word was relevant / not relevant to VT

# Tailor brand / marketing to particular markets

## NYC Metro

### *Looking for luxury escape*

- More likely to want to be seen as "extravagant" (compared with MA)
- More likely to spend $1,000+ at their winter destination (compared with MA)
- More likely have a household income >$100K (compared with VT and Canada metro)
- Views "Not crowded" is a top 5 important attribute while overall winter vacationers do not
- Doesn't differentiate much across competitive set but views VT to lead "hearty and healthy"
- Top 5 winter vacation destinations excluding VT: Mid-Atlantic shore, Adirondacks, other destinations, Poconos, West Coast
- Doesn't view "free" in "you're free to come as you are" as relevant to VT

# Tailor brand / marketing to particular markets

## Massachusetts

- Doesn't view "heavy" in "heavy wool blankets", "hearty stew" as relevant to VT

### *Looking for practical, outdoor weekend vacations*

- More likely to want to be seen as "thrifty" (compared with NYC and Canada metro)
- More likely to participate in outdoor activities
- More likely to take 2-night winter vacations
- More likely to have a household income >$100K (compared with VT)
- Views "Not crowded" is a top 5 important attribute while overall winter vacationers do not
- Views VT to co-own "unspoiled landscape" and "natural" and lead "environmentally-minded"
- Top 5 winter vacation destinations excluding VT: NH, ME, Cape Cod, other destinations, RI

# Tailor brand / marketing to particular markets

## Canada Metro

### *Looking for longer luxury vacations in Canada or Northeastern US*

- More likely to want to be seen as "extravagant" (compared to MA)
- More likely to take 1-2 week winter vacations
- More likely to spend $1,000+ at their winter destination (compared to MA)
- More likely to spend $1,000+ traveling to their winter vacation
- More likely to shop on their winter vacation
- Views "Natural" is a top 5 important attribute while overall winter vacationers do not
- Top 5 winter vacation destinations excluding VT: other destinations, Eastern Canada, Western Canada, NH, Adirondacks
- Doesn't differentiate much across competitive set but views VT to lead "warm, friendly people" with Eastern Canada
- Doesn't view "heavy wool blankets", "free" in "you're free to come as you are" and "fresh" in "fresh tracks" as relevant nor "Nor'easters" as relevant as other regions

## Vermont

### *Looking to relax and be seen as outdoorsy*

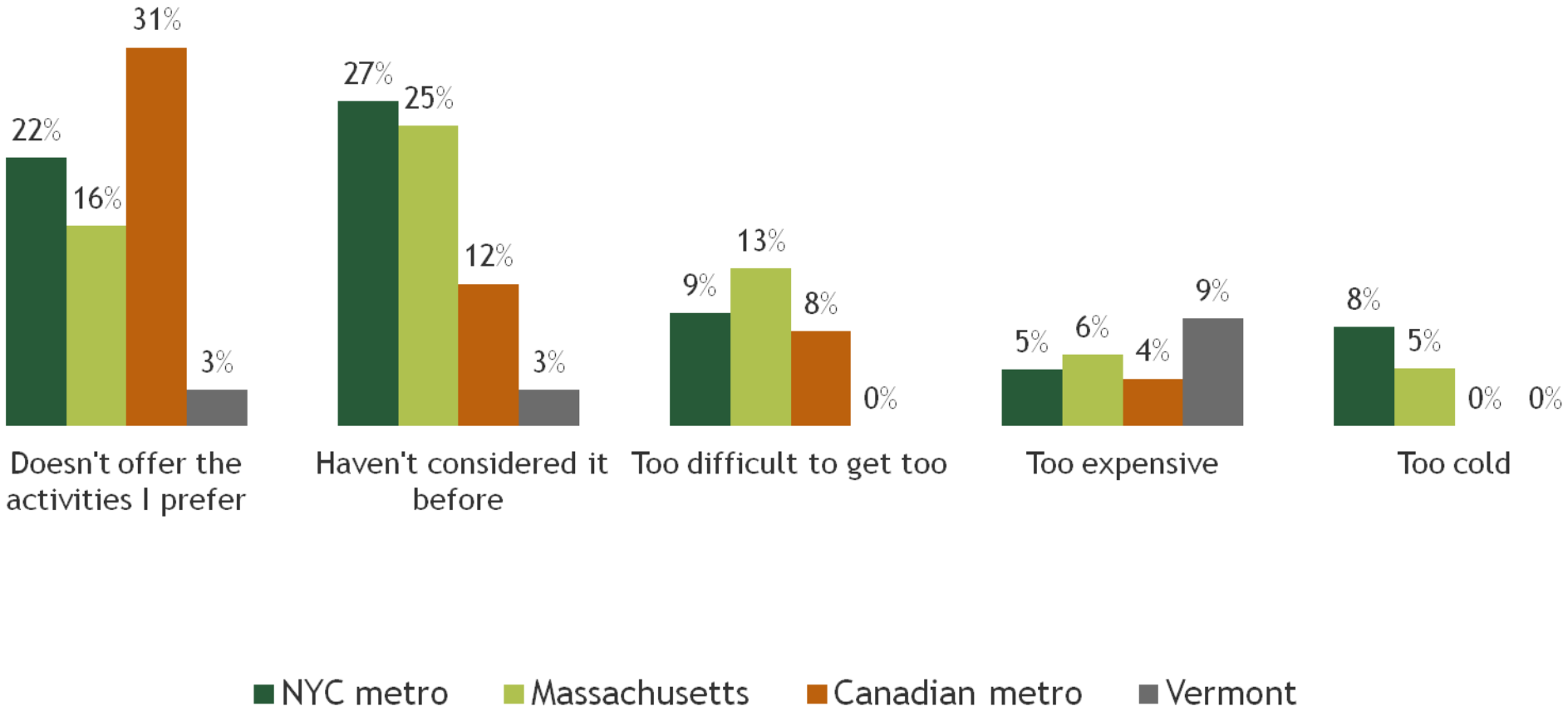
- More likely to want to be seen as "outdoorsy" (compared to NYC and Canada metro)
- More likely to "relax" on their winter vacation
- More likely to have a household income <$50K and not to be employed full-time
- Top 5 winter vacation destinations excluding VT: other destinations, NH, ME, RI, West Coast
- Views VT as much more differentiated than out-of-state vacationers
- Doesn't view "upscale" as polarizing
- Views the images of the covered bridges as more relevant to VT

# Target people who haven't vacationed in Vermont

## Those who take winter vacations but haven't in Vermont are more likely than Vermont winter vacationers to…

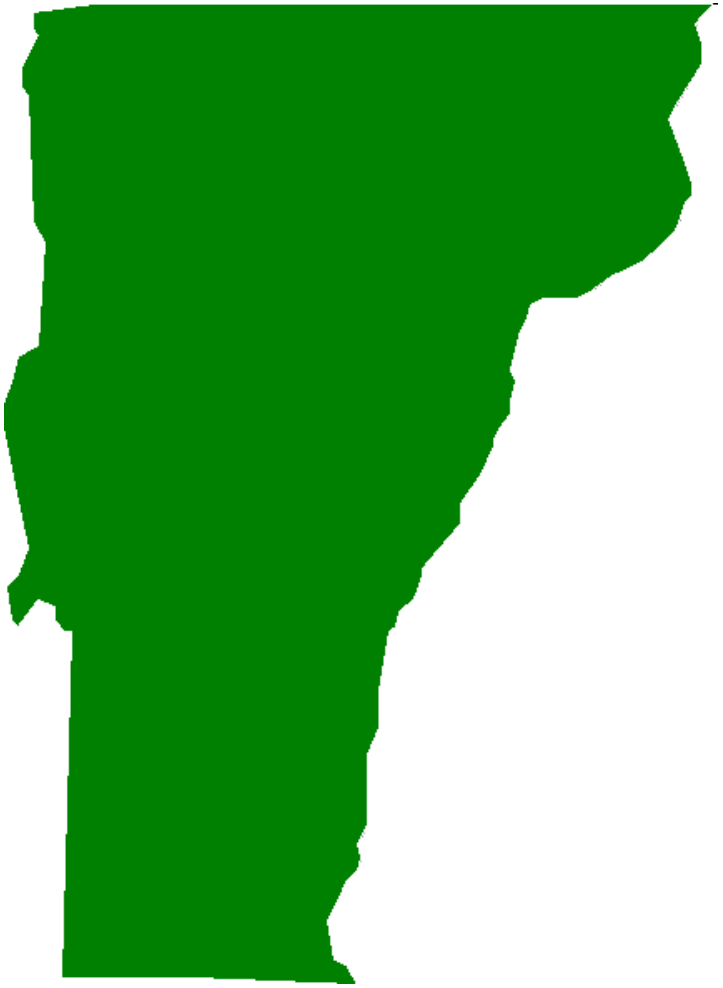
- Want to be seen as "conservative", "urban" and "practical"
- Relax, shop and do cultural activities on vacations (not outdoor activities)
- Take winter vacations for 1-2 weeks
- Not vacation with a spouse and/or friends
- Stay in a hotel / motel
- Spend $1,000+ at the destination and $300+ traveling to the destination
- Be retired, a homemaker or unemployed
- Be less educated
- Have a household income less than $150,000

# Target people who haven't vacationed in Vermont




Reasons that received less than 3% responses across regions include: lack of nightlife, negative experience in the past, unpredictable snow conditions, have heard negative things about it, inconsistent availability of wireless coverage/service

# Vermont Brand Study



If you'd like to hear more results from this study including cross-seasonal findings, please come to one of the "road shows" this summer.

Schedule will be posted at:

www.cmo.vermont.gov

www.vermontpartners.org