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Opportunities for VT Vacation Providers

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Summer 2010

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 & Vacationer Profile**
- **Opportunities for Vermont Vacation Providers**

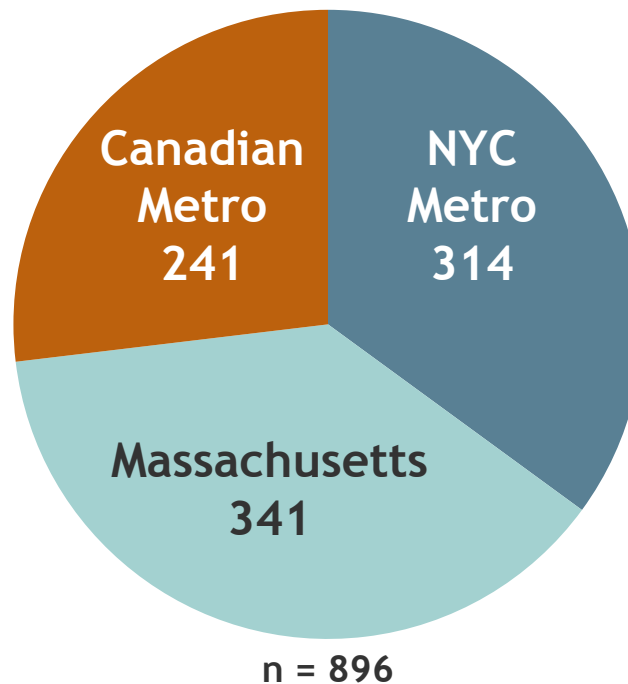
Who Did We Talk To?

We reached out to out-of-state vacationers from three key markets as well as Vermont residents and Vermont vacation providers.

Vermont Vacation
Providers



Out-of-State
Vacationers



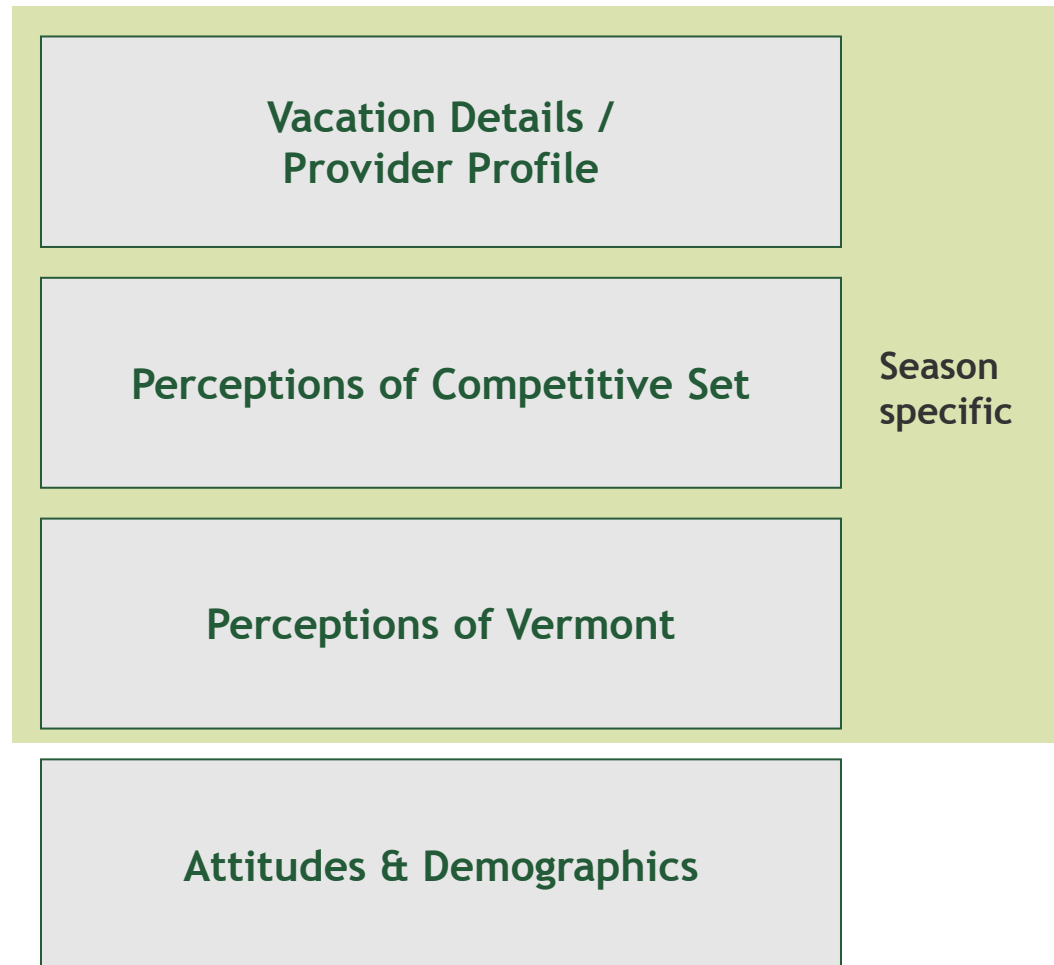
Vermont Residents /
Vacationers



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”

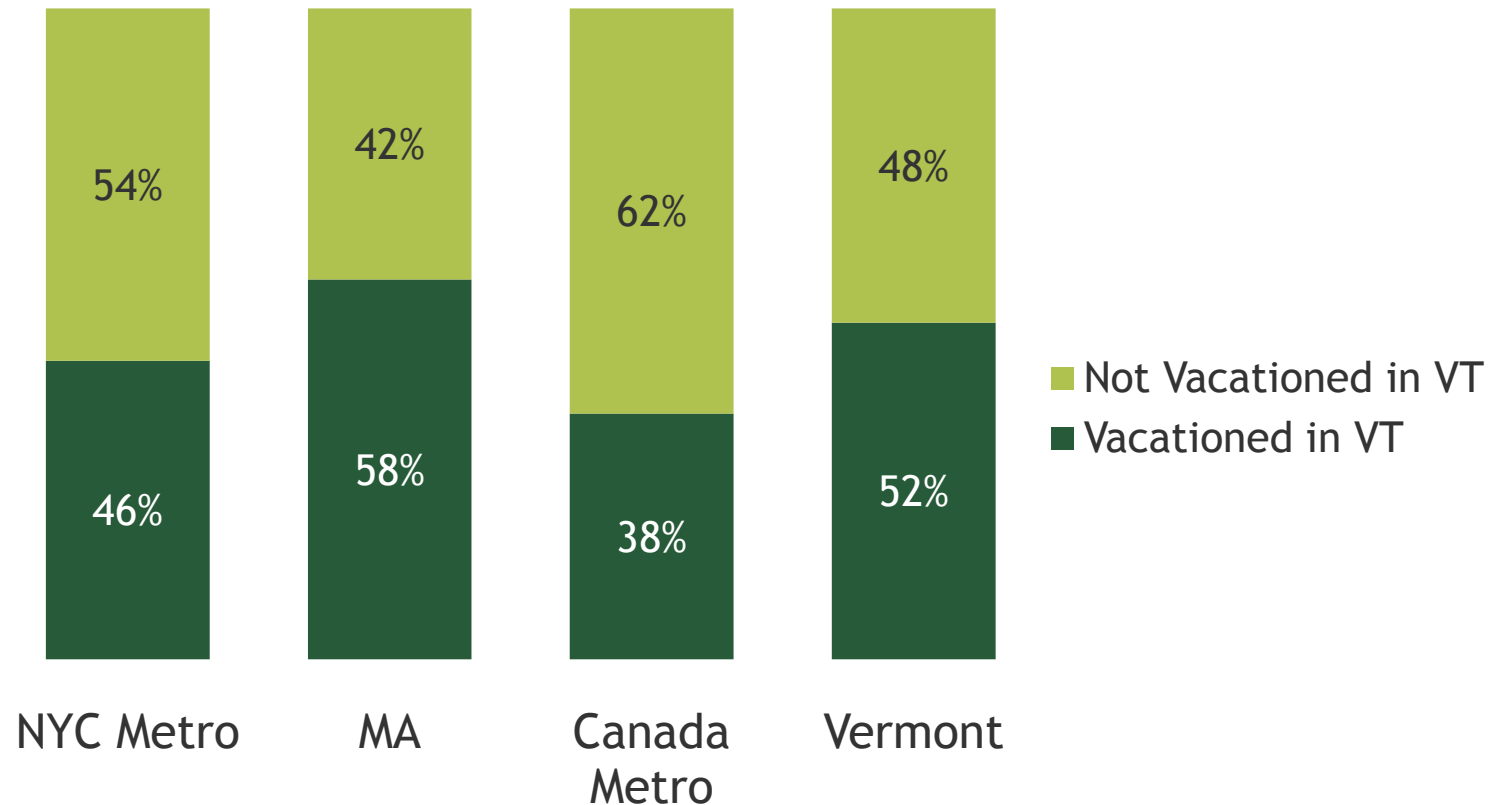
What Did We Ask Them?

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?

Residents of MA, NYC and VT are more likely to have vacationed in Vermont compared with Canadians.



* There were no quotas enforced on vacation location with the exception of Canada where it was more difficult to find respondents who had vacationed in Vermont. Therefore the 38% is likely higher than actual.

Where Are People Going If Not To Vermont?

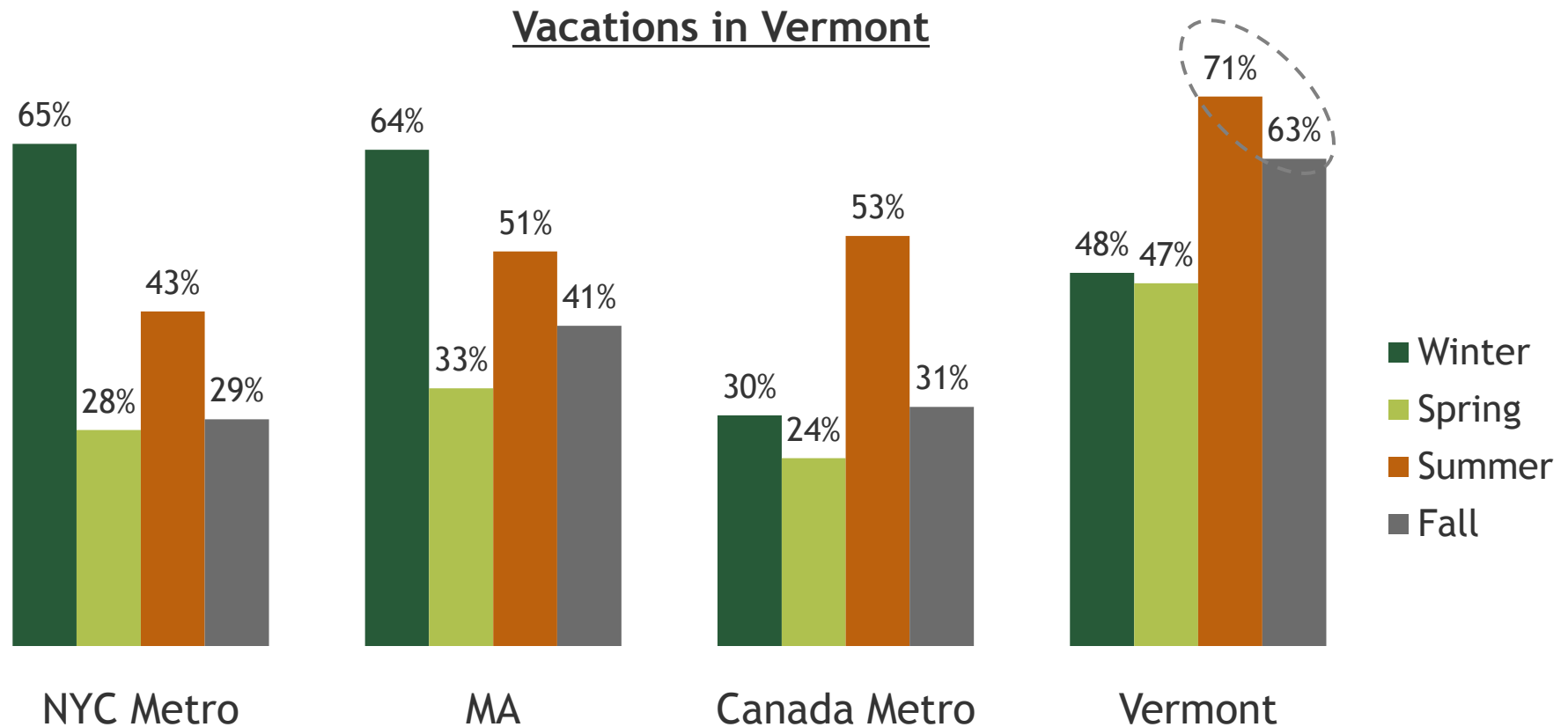
Those who have not vacationed in Vermont are going to various other locations which vary by home market.

Vacation Destinations : Non-VT Vacationers	NYC Metro	Massachusetts	Canada Metro	Vermont
New Jersey / Maryland / Delaware shore	51%	20%	13%	13%
The Poconos	27%	4%	2%	1%
The Adirondacks / Upstate New York	15%	6%	7%	17%
West Coast	15%	13%	5%	13%
New Hampshire	9%	51%	3%	21%
Cape Cod & Islands (MA)	8%	44%	2%	10%
Maine	12%	41%	8%	37%
Rhode Island or Connecticut shore	14%	30%	3%	17%
Eastern Canada	12%	8%	47%	16%
Western Canada	2%	2%	29%	1%
Other Mid-Atlantic location	12%	8%	9%	16%
Other New England location	12%	7%	5%	13%
The Rocky Mountains	3%	6%	5%	9%
The Berkshires	3%	13%	1%	0%
Other location	28%	25%	41%	27%

Top 5 other destinations

When Do Vacationers Come to Vermont?

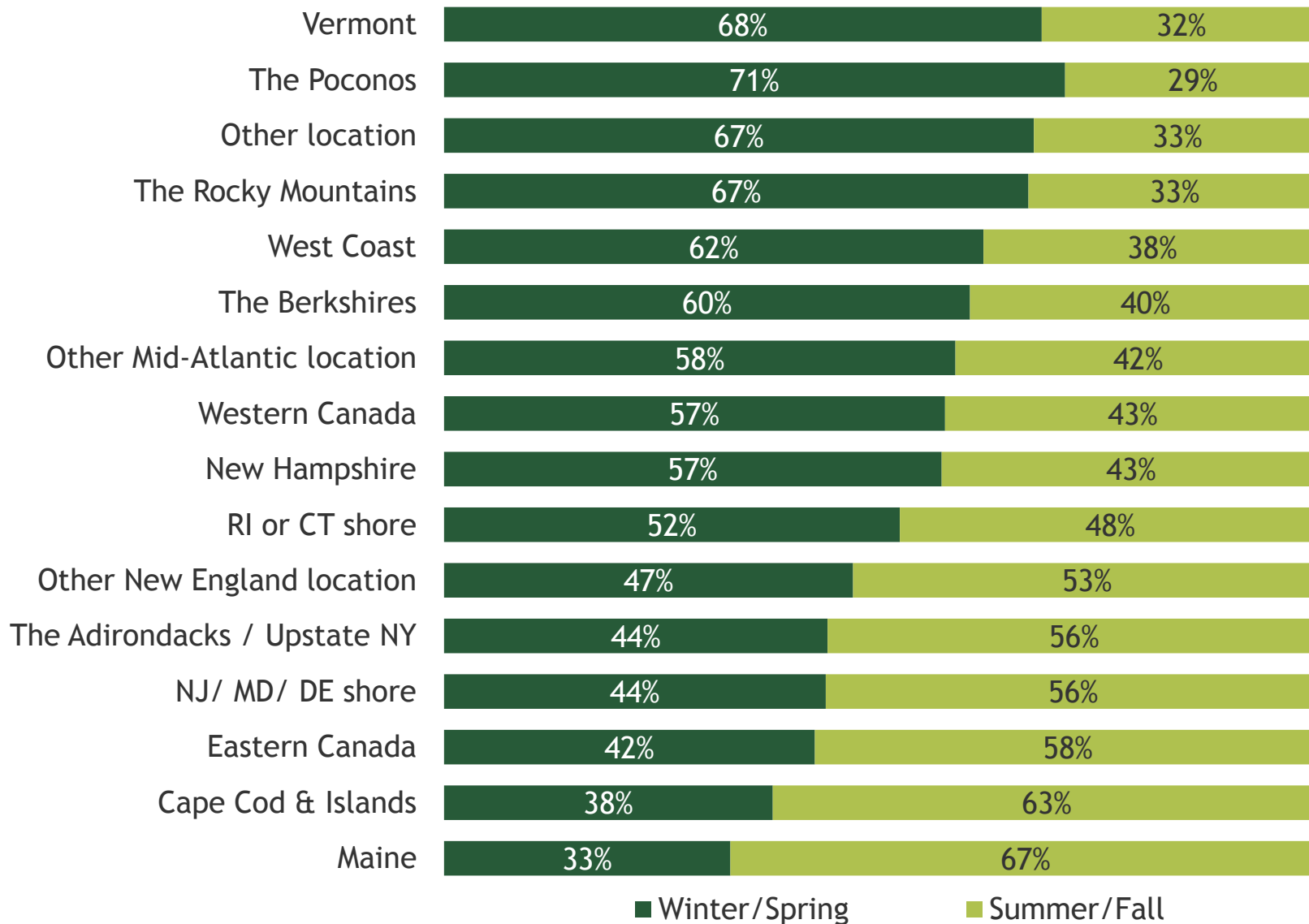
Vermonters are more likely to vacation in-state during the summer and fall compared to vacationers from out of state. Winter is the key season to vacation in VT for MA and NYC metro residents.



NYC includes New York City and suburbs of CT, NJ, and NY. MA includes all of Massachusetts, not just Boston. Canada Metro includes Ottawa, Toronto, and Montreal.

Which Seasons Were Described and Analyzed?

More than half (68%) of the Vermont vacations described occurred in the winter or spring while more than half (67%) of Maine vacations described occurred in the summer or fall.



Note: If a respondent had not visited Vermont, they were asked to describe their most recent vacation. If more than one was season indicated for that destination the respondent was randomly assigned to “winter/spring” or “summer/fall”

What Do Vacationers Look Like Overall?

Age

- 16% - 30 or younger
- 19% - 31 to 40
- 25% - 41 to 50
- 25% - 51 to 60,
- 14% - 60+

Employment

- 74% - Employed
- 11% - Retired
- 6% - Homemaker
- 6% - Unemployed
- 3% - Student

Gender

- 54% - Female

Education

- 13% - High school diploma or less
- 19% - Some college
- 43% - College
- 25% - Graduate school

Marital

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

Income

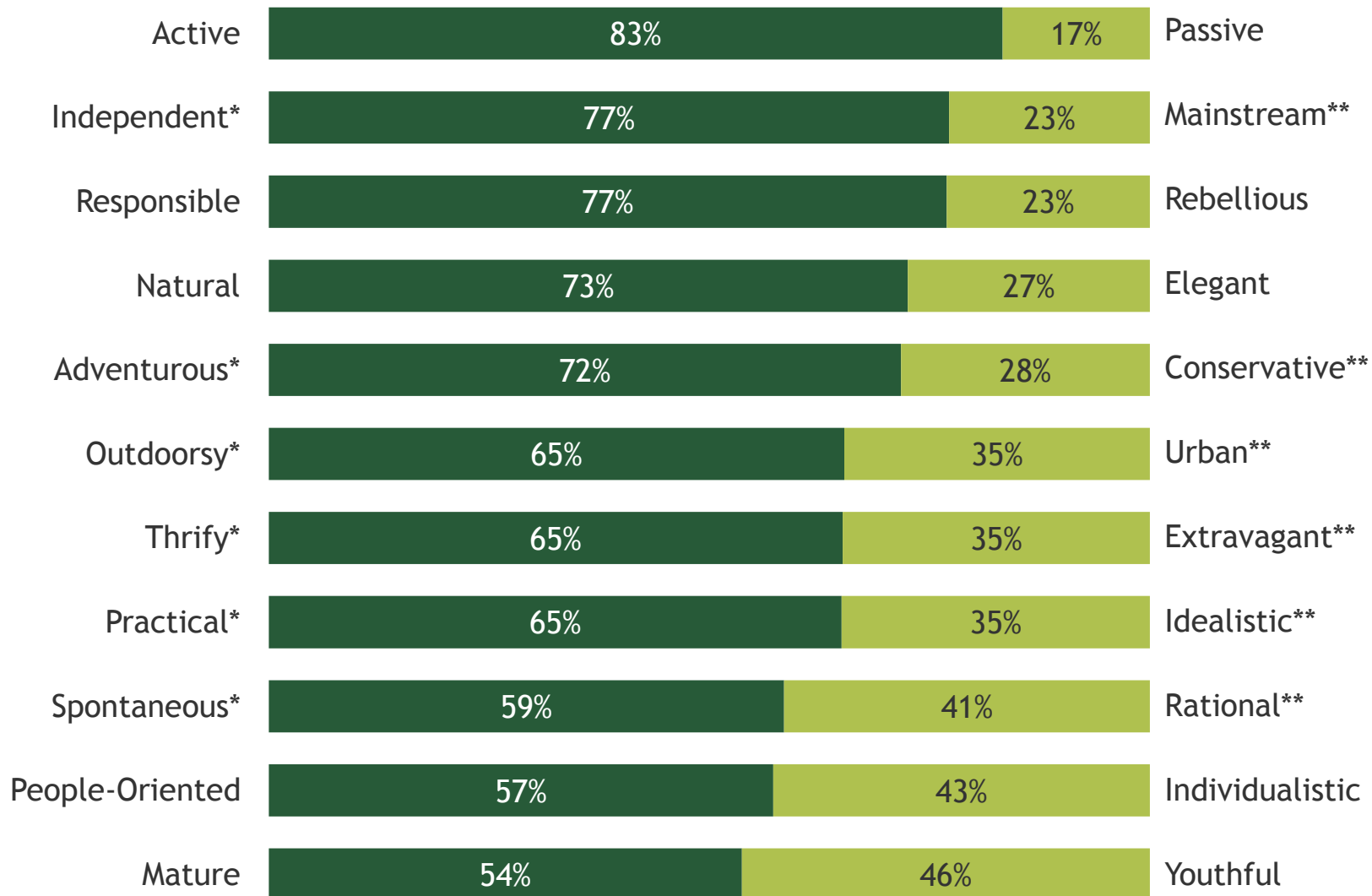
- 60% - less than \$100K
- 32% - \$100K+
- 8% - Not answer

Race / Ethnicity

- 83% - White/Caucasian
- 6% - Asian
- 2% - Black/African Amer.
- 3% - Hispanic/Latino
- 2% - Other
- 4% - Not answer

How Do They Want To Be Seen?

More than 70% of respondents would like to be seen as active, independent, responsible, natural and adventurous.



* Those who vacationed in VT are significantly more than non-VT vacationers to want to be seen as...

** Those who have not vacationed in VT are significantly more than VT vacationers to want to be seen as...

What Do Their Vacations Look Like?

Length of Stay

- 7% - day trip
- 9% - 1 night
- 26% - 2 nights
- 39% - 3-6 nights
- 15% - 1 to 2 weeks
- 4% - 2+ weeks

Spend at Destination

- 8% - \$50 to \$99
- 27% - \$100 to \$299
- 44% - \$300 to \$999
- 21% - \$1,000+

Lodging

- 44% - Hotel / Motel
- 12% - B&B / Inn
- 27% - House / Condo
- 7% - Campground
- 10% - Other

Activities on Vacation

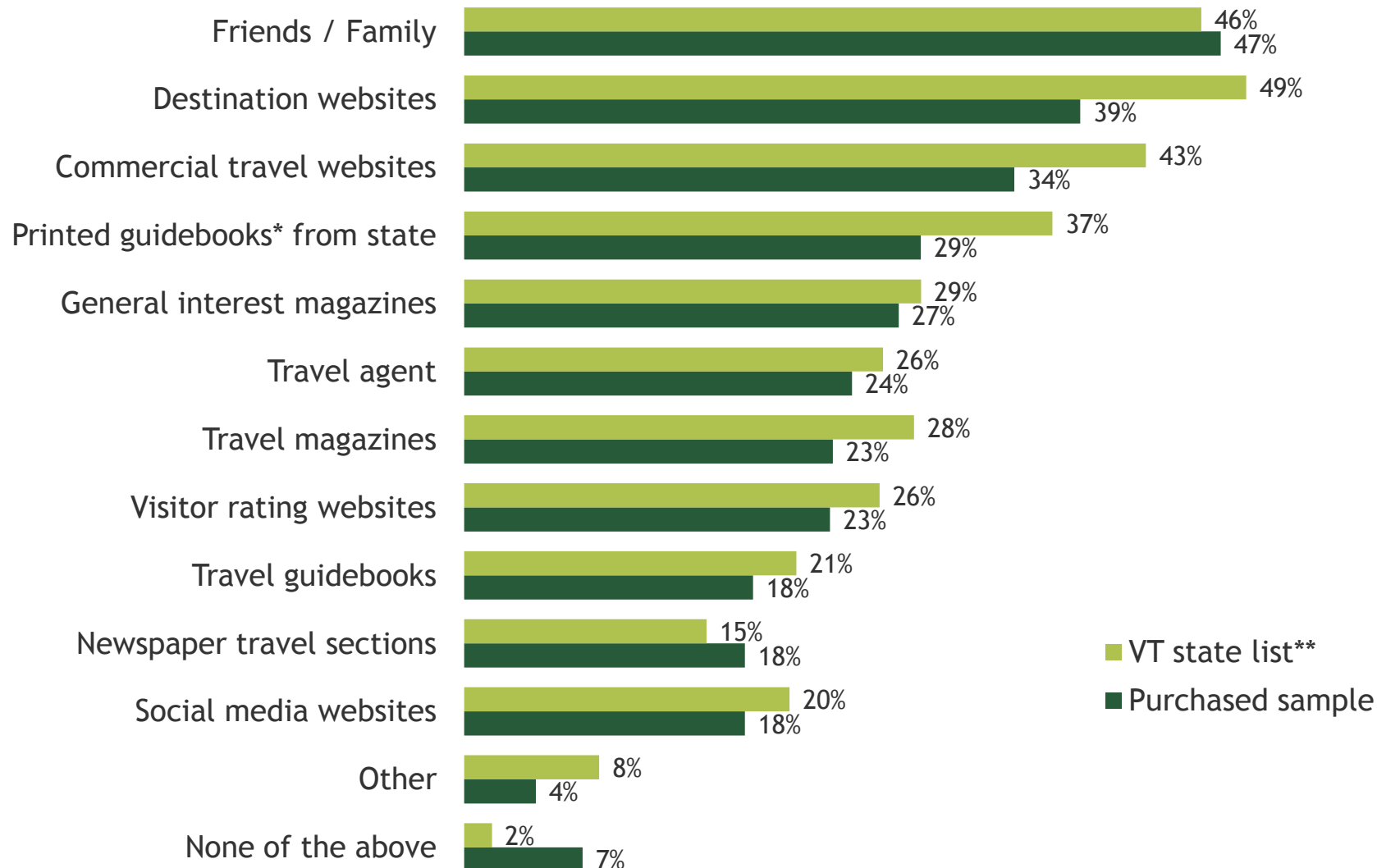
- 69% - Relax
- 57% - Shopping
- 56% - Outdoor
- 40% - Other

Companions

- 69% - Spouse
- 32% - Children
- 20% - Friends
- 7% - Vacationed alone

What Sources Do They Use For Vacation Planning?

About half of respondents go to friends and family for information when planning vacations. They also often look to destination and commercial travel websites.



* Brochures or guide books from destination state

** The respondents who were invited to participate through the VT state list are more likely to go to planning sources that would lead them to signing up for the VT state list



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- Opportunities for Vermont Vacation Providers

Opportunities for Vermont Vacation Providers

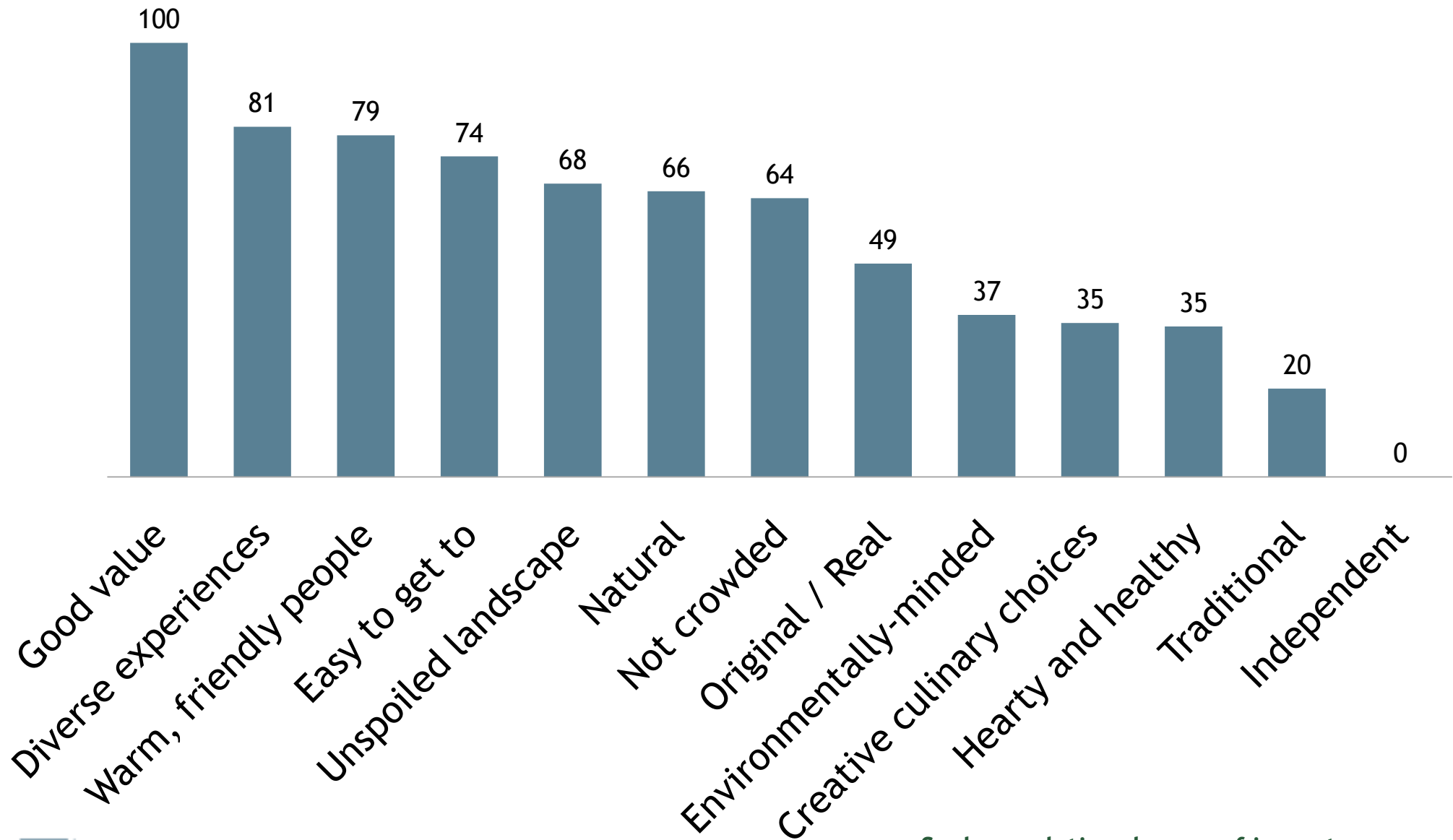
- Focus on the more “important” vacation attributes
- Emphasize Vermont’s unique attributes within the competitive set
- Incorporate images that are relevant to Vermont
- Incorporate messaging that is relevant to Vermont
- Convert one season vacationers to multi-season vacationers
- Target people who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

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Important Vacation Attributes - All Seasons

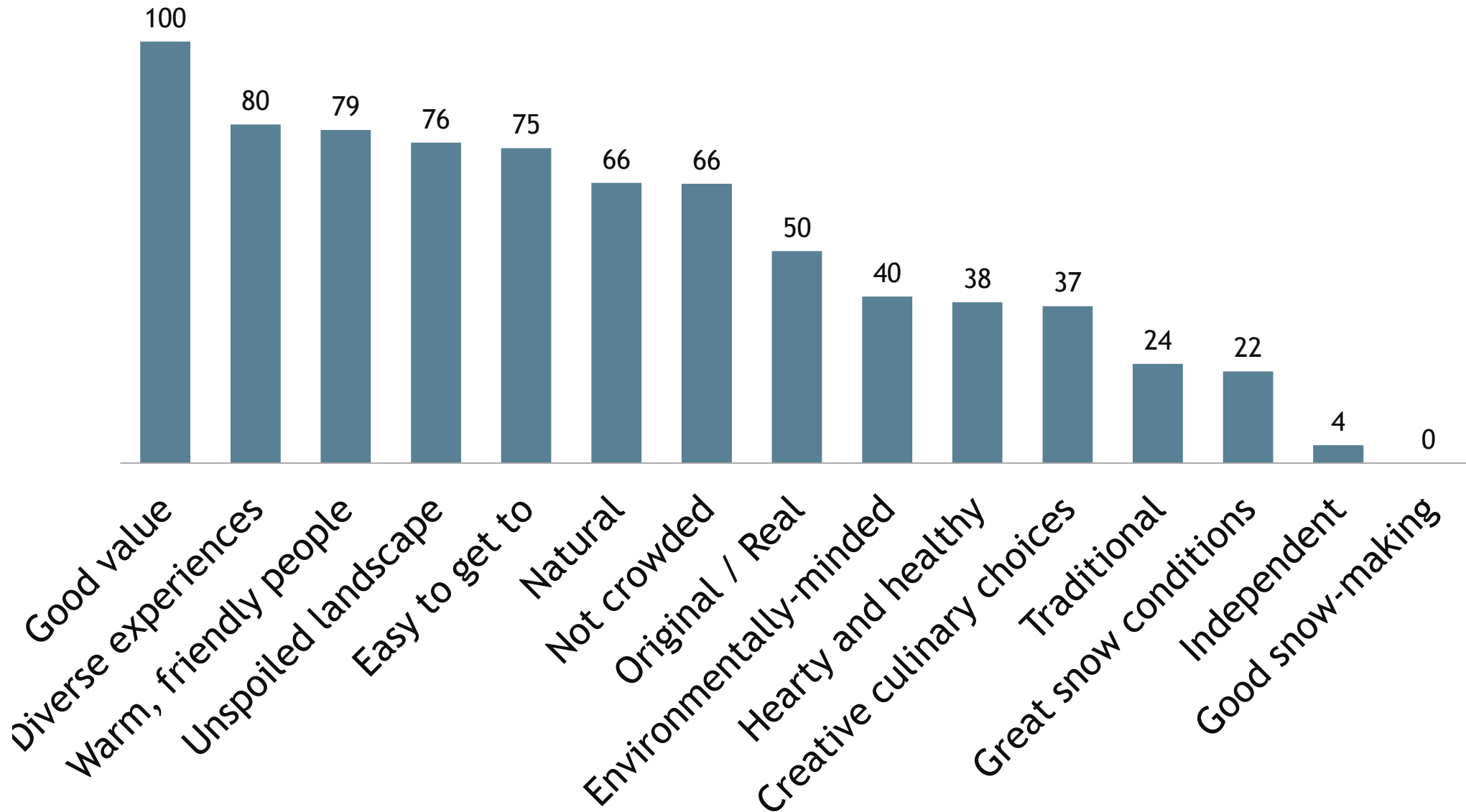
“Good value” is twice as important to vacationers when choosing a vacation destination than “original/real”.



Scale = relative degree of importance

Important Vacation Attributes - Winter

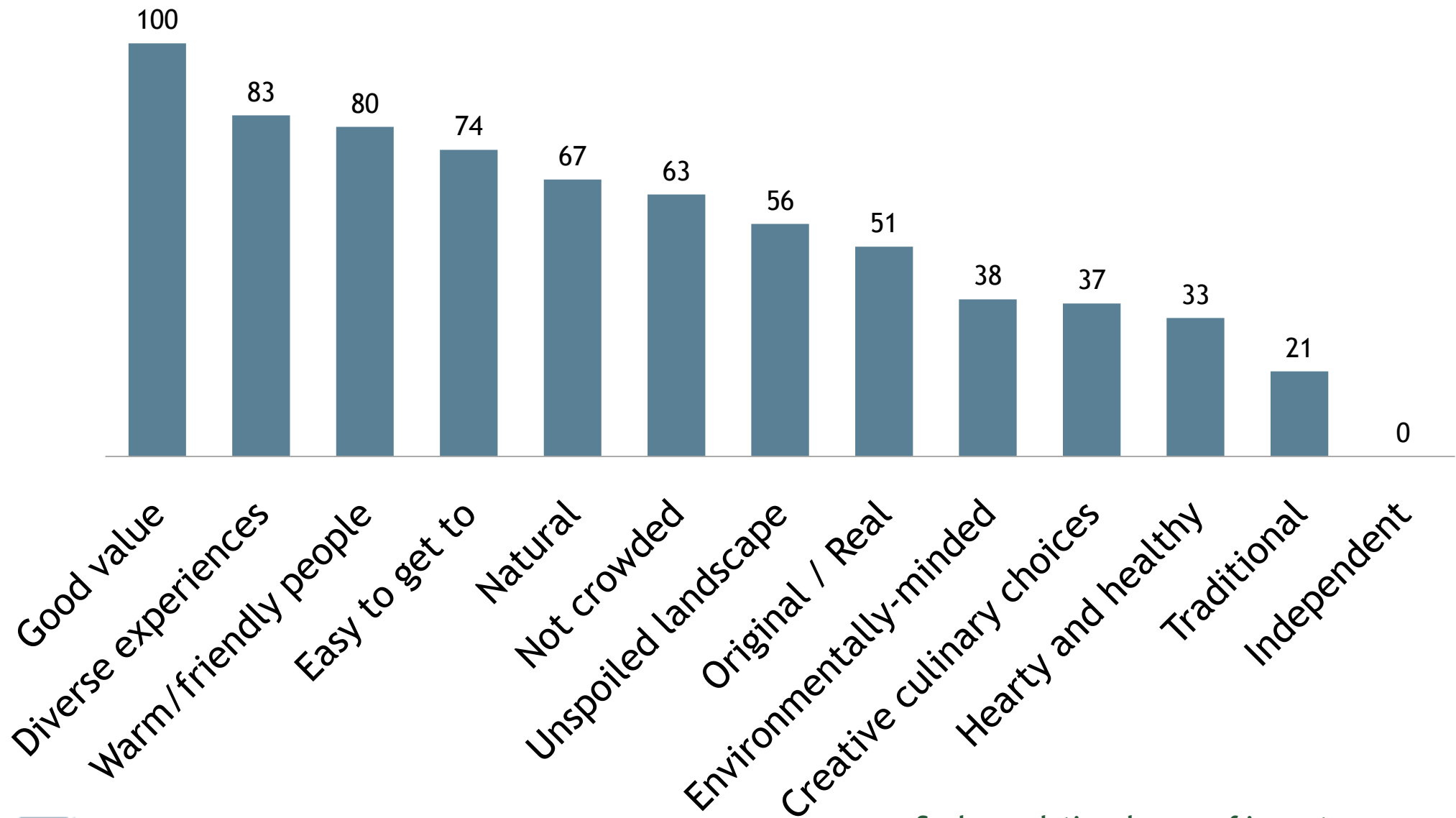
“Great snow conditions” and “good snow-making” are relatively unimportant to winter vacationers overall.



Scale = relative degree of importance

Important Vacation Attributes - Summer

“Unspoiled landscape” is relatively less important in the summer compared with the winter.



Scale = relative degree of importance

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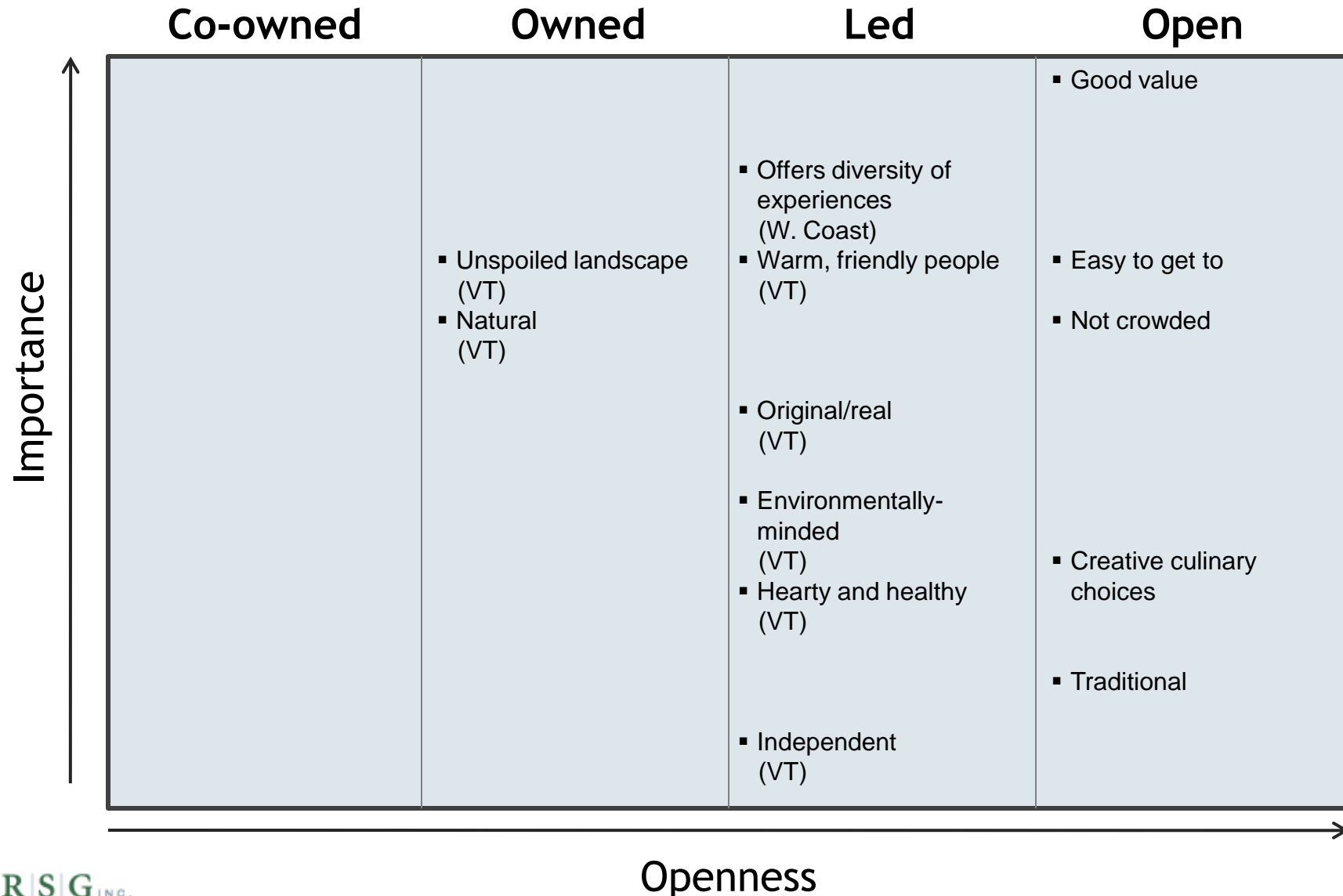
Competitive Set by Season

Respondents were asked about their perceptions of various vacation destinations. The set of destinations was specific to winter/spring and summer/fall.

	Winter / Spring	Summer / Fall
New Jersey / Maryland / Delaware shore		✓
The Poconos	✓	✓
The Adirondacks / Upstate New York	✓	✓
West Coast	✓	✓
New Hampshire	✓	✓
Cape Cod & Islands (MA)		✓
Maine	✓	✓
Rhode Island or Connecticut shore		✓
Eastern Canada	✓	✓
Western Canada	✓	✓
The Rocky Mountains	✓	✓
The Berkshires	✓	✓

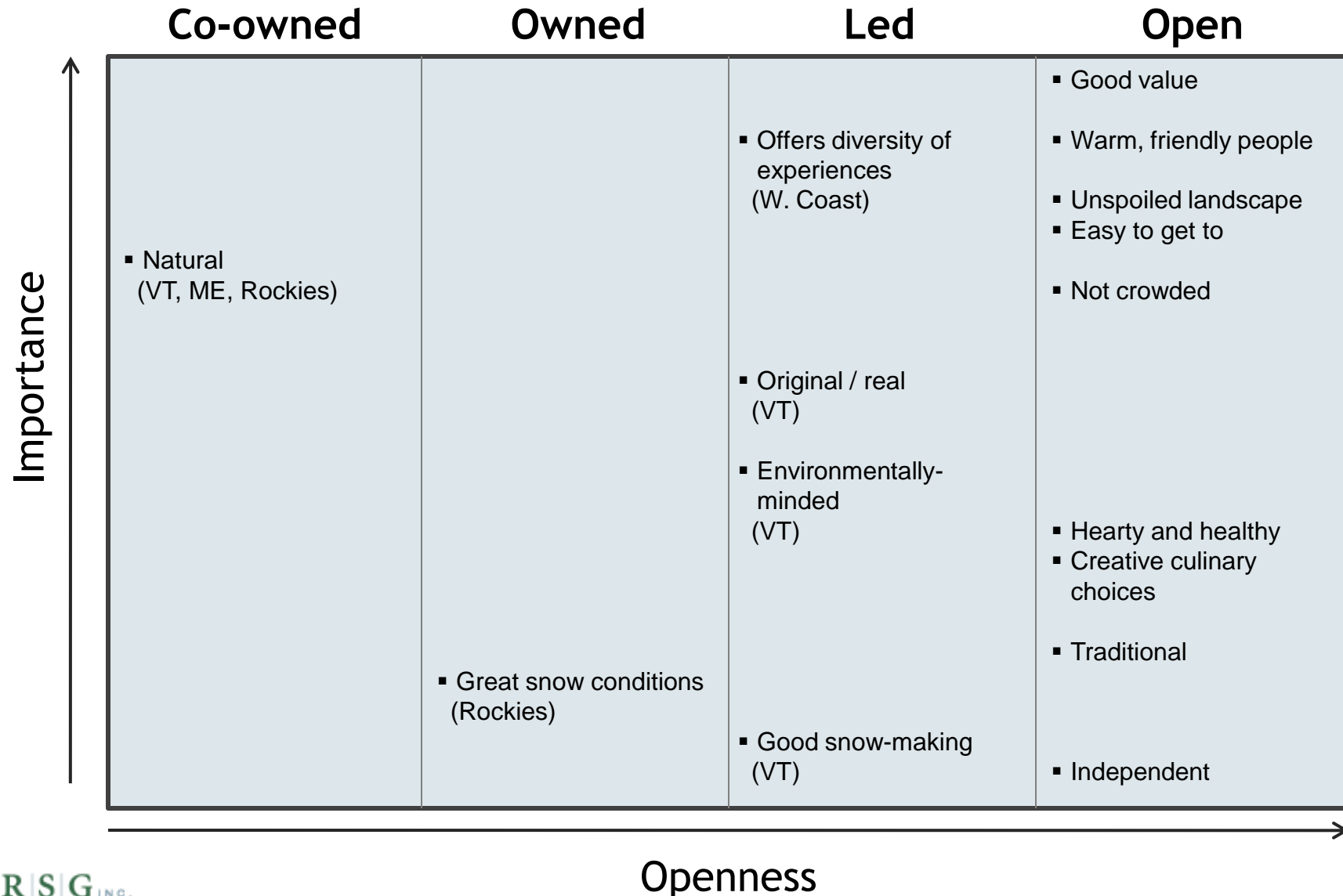
Competitors' Ownership of Vacation Attributes - All

Vermont is viewed as differentiated from the competitive set on various attributes. However, the most important attribute “good value” is an open opportunity.



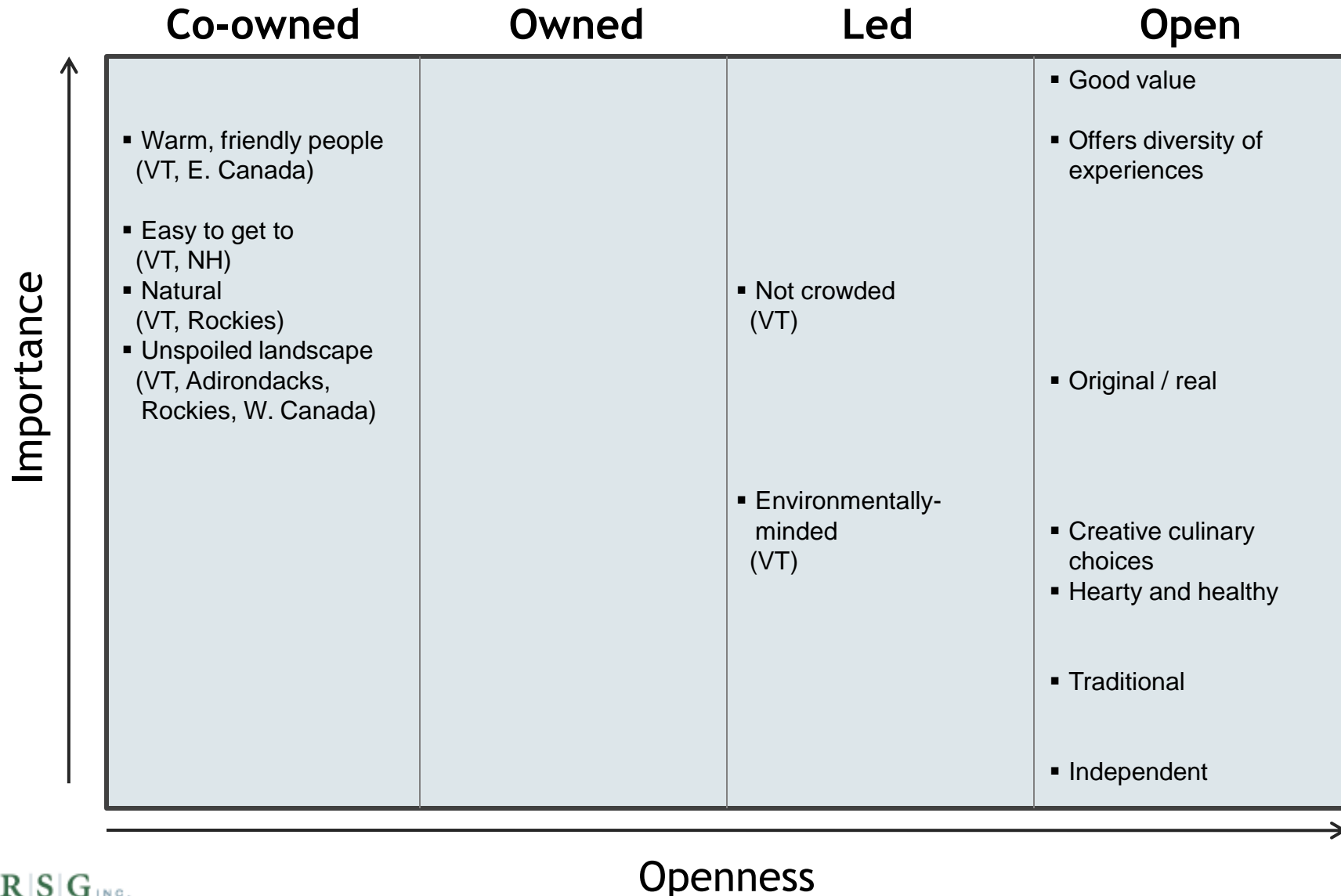
Competitors' Ownership of Vacation Attributes - W

Vermont is already viewed to co-own “natural”. The Rockies own “great snow conditions”, so it is unlikely that Vermont will be able to compete there. “Good value”, “warm, friendly people”, “unspoiled landscape” and “easy to get to” are the best opportunities.



Competitors' Ownership of Vacation Attributes - S

Vermont is already viewed to co-own or lead several attributes. “Good value” and “offers diversity of experiences” are best opportunities.

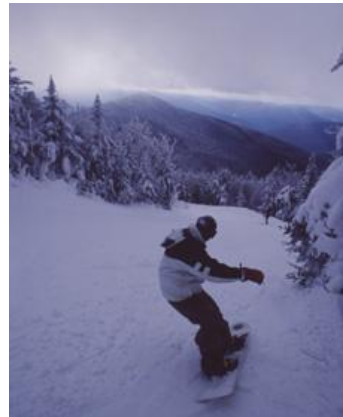
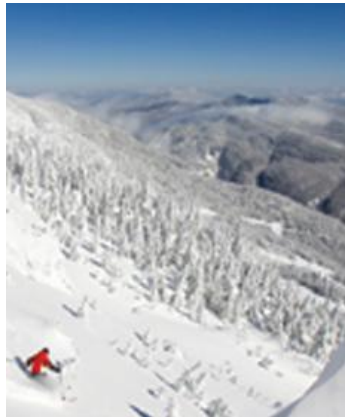


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- Emphasize Vermont’s unique attributes within the competitive set
- **Incorporate images that are relevant to Vermont**
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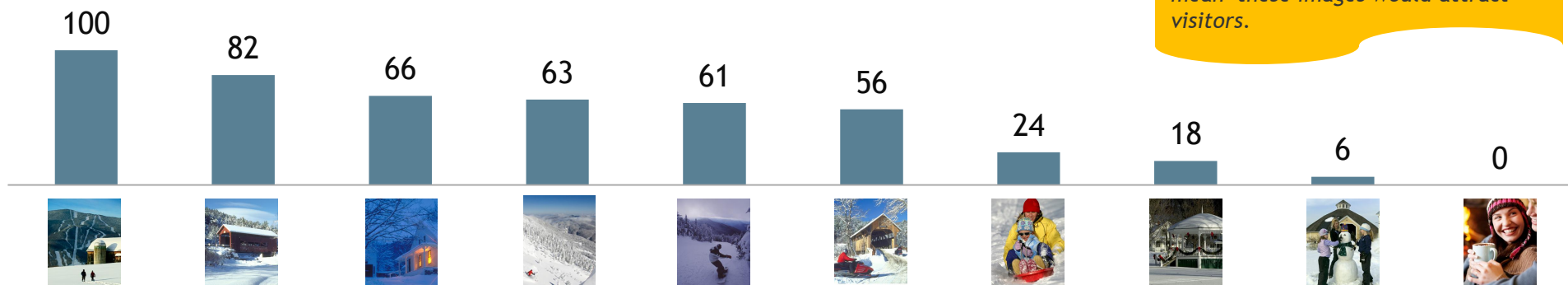
Winter Images Tested

The images tested are reflective of the work done in representing rational, emotional and cultural elements.



Most Relevant Winter Images

These findings reflect vacationer perception. It does not necessarily mean these images would attract visitors.



Scale = relative degree of relevance

Most Relevant to VT

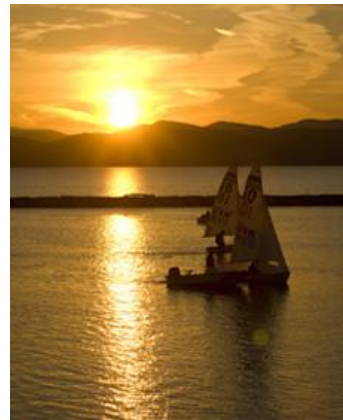


2nd Most Relevant to VT



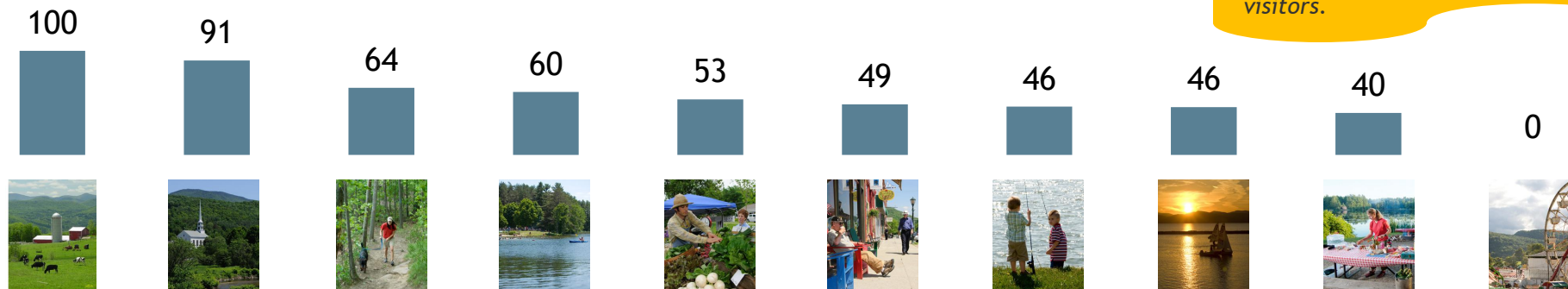
Summer Images Tested

Like the winter images, the summer images tested are a mix of landscapes, personal interactions and activities.



Most Relevant Summer Images

These findings reflect vacationer perception. It does not necessarily mean these images would attract visitors.



Scale = relative degree of relevance

Most Relevant to VT



2nd Most Relevant to VT



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Messages Tested

The messaging concepts tested were season specific and were products of marketing research done previously. Respondents were asked to highlight words that were relevant to Vermont and those that were not relevant to Vermont. An overview of respondents' reactions are listed below.

Words / Phrases To Use

Winter / Spring...

- Winter
- Pure and Simple

Summer / Fall...

- Unhurried
- Unspoiled
- Farmland and forests

Words / Phrases To Avoid

Winter / Spring...

- Nor'easters
- Eccentricity
- Upscale

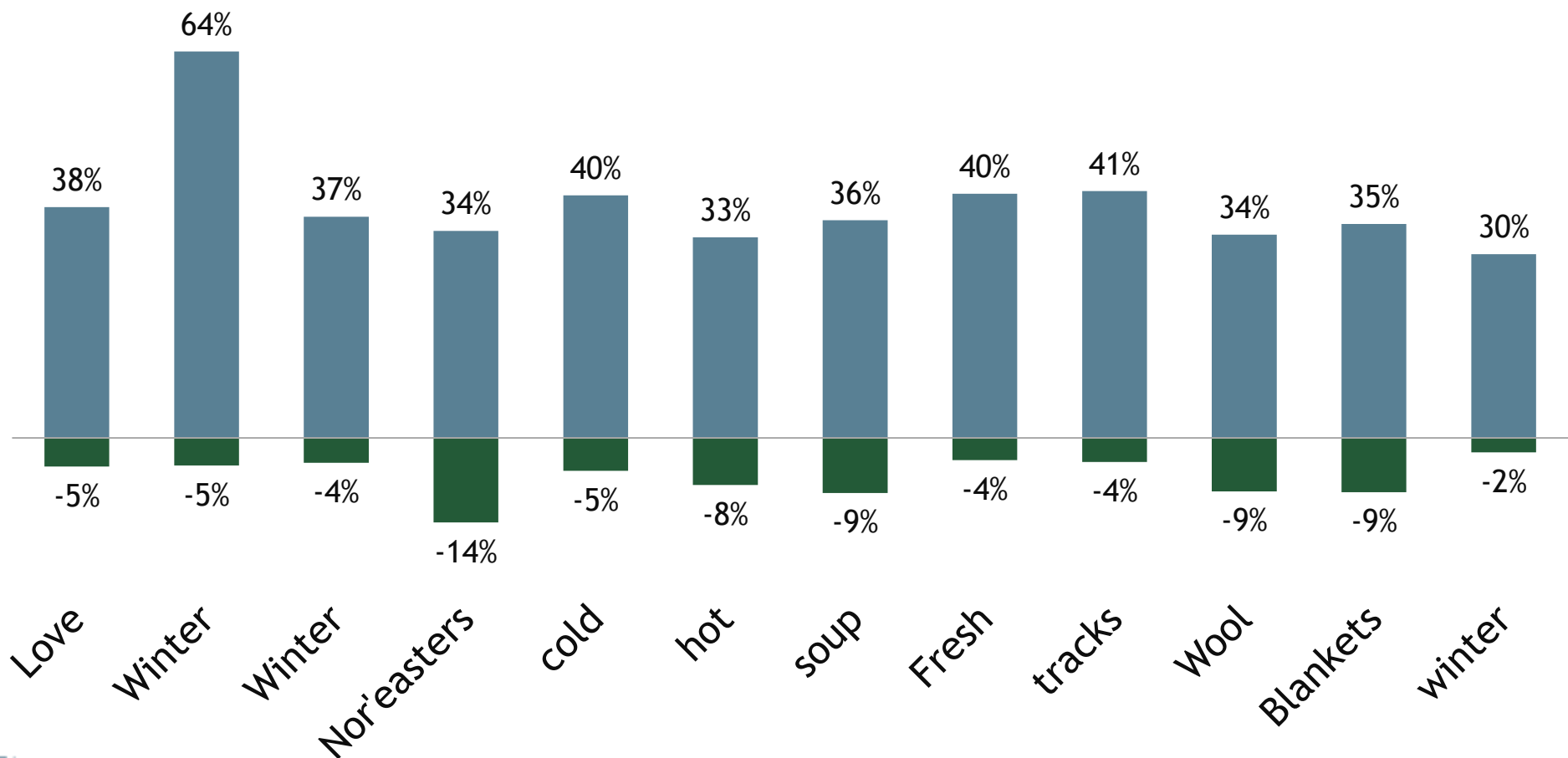
Summer / Fall...

- Sun-drenched dock
- Kayaking
- Strawberry
- Thriving downtowns
- Reconnect

Winter Concept #1

Love Winter.

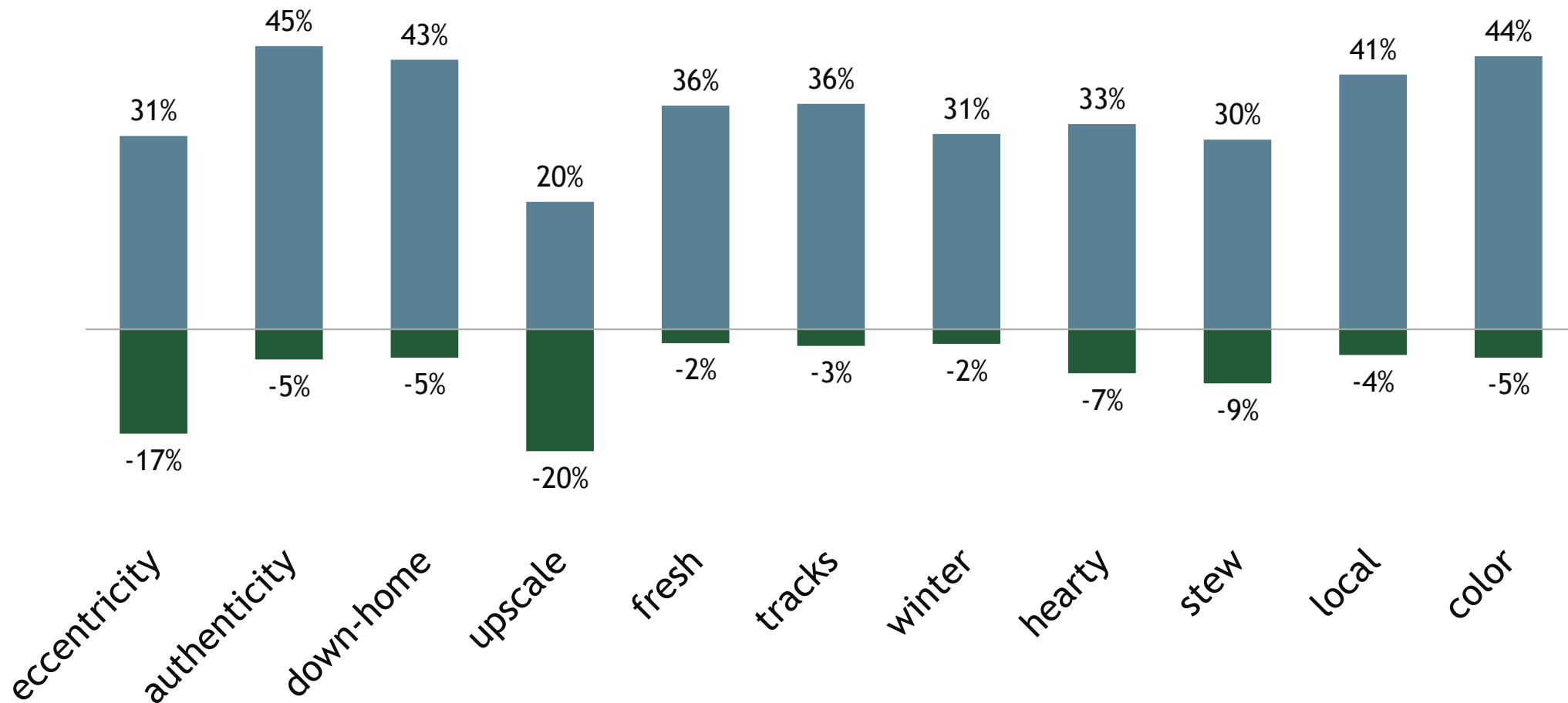
We're Vermonters and we love Winter. Epic Nor'easters. The tingle of cold on our cheeks. Steaming bowls of hot soup. Fresh tracks. Heavy Wool Blankets. We love how winter in Vermont makes us feel and for all the ways there are to enjoy it.



Winter Concept #2

Vermont Winter. It's all True.

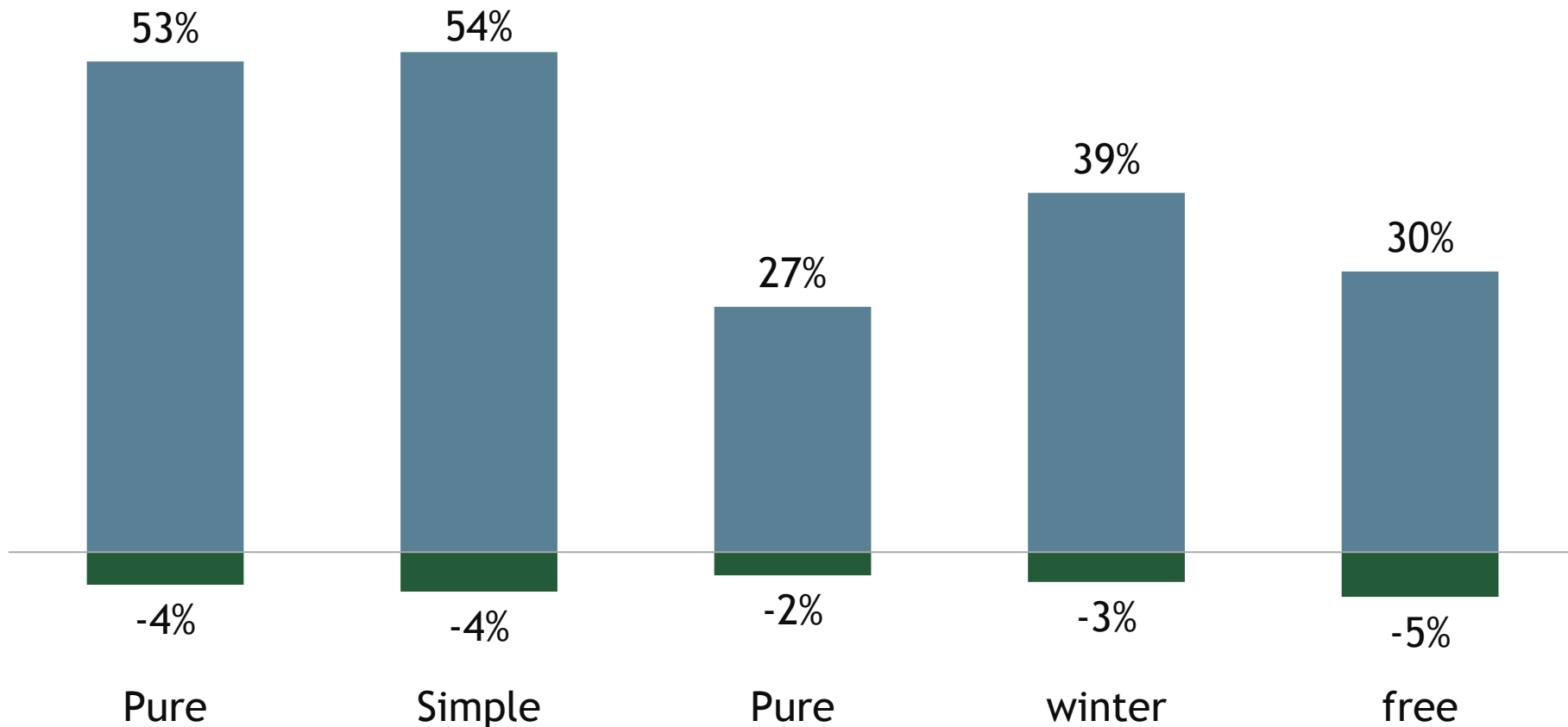
Whether you like eccentricity or authenticity, down-home or upscale, fresh tracks or fresh ideas, winter in Vermont is a hearty stew to which everyone gets to add their own ingredients. In Vermont, local color comes in every shade imaginable.



Winter Concept #3

Vermont Winter. Pure and Simple.

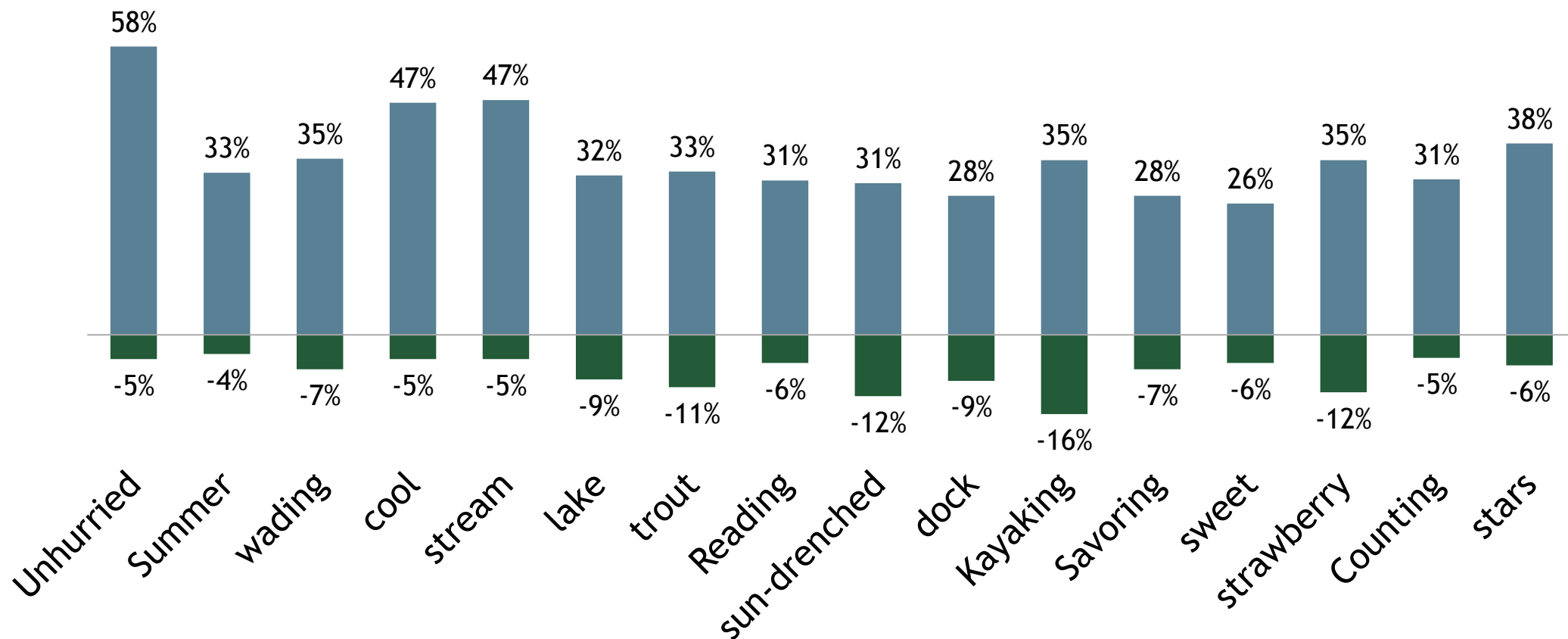
Pure and simple, Vermont winter is the best of everything you remember combined with the best of what's to come. Where you're free to come as you are and be who you want.



Summer Concept #1

Unhurried Summer.

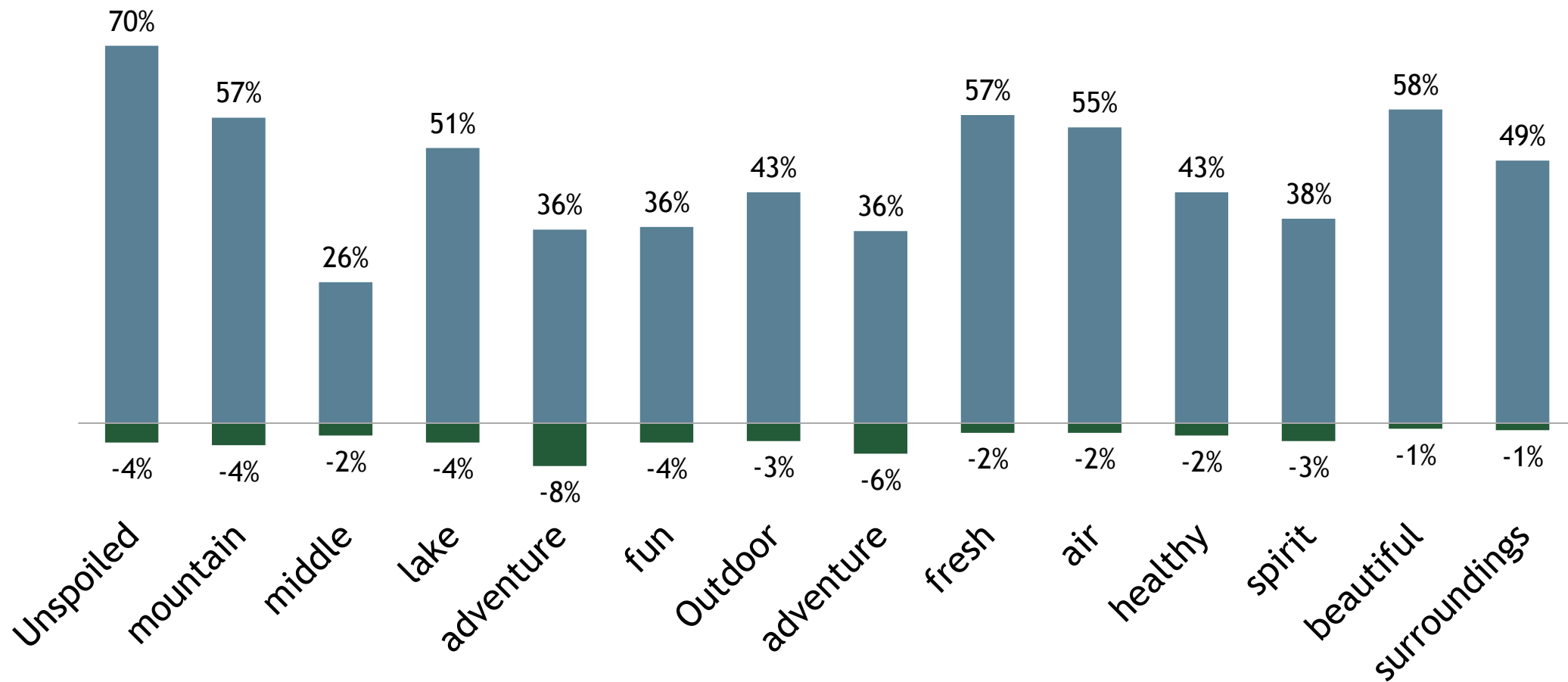
Summer in Vermont means wading in a cool stream. Casting for lake trout. Reading on a sun-drenched dock. Kayaking among loons. Savoring a sweet strawberry. Counting the stars. Find yourself in Vermont.



Summer Concept #2

Vermont. Unspoiled.

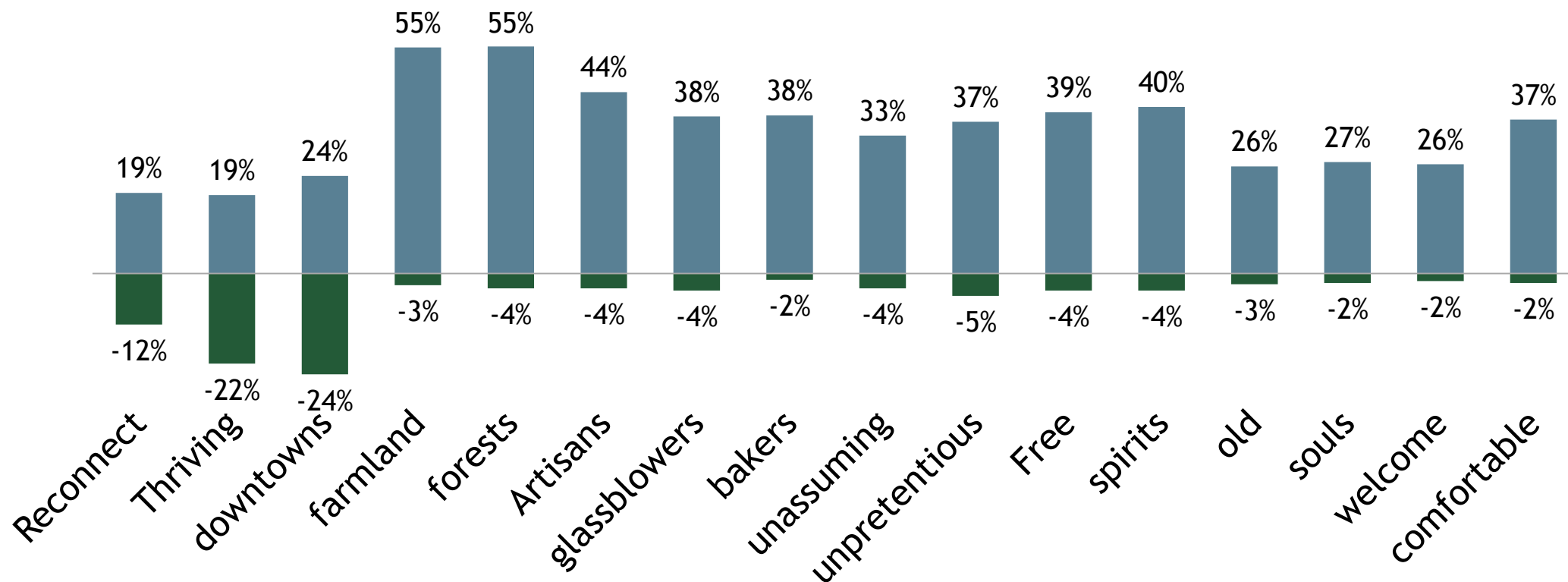
On top of a mountain or in the middle of a lake, you can find adventure and fun. Outdoor adventure never gets old here. You can play every day and never tire of the fresh air and healthy spirit that permeates our beautiful surroundings.



Summer Concept #3

Vermont. Reconnect.

Thriving downtowns blend seamlessly into farmland and forests. Artisans, from glassblowers to bakers, greet visitors, unassuming and unpretentious. Free spirits and old souls are equally welcome, and equally comfortable. It's about connecting, and you'll find it in Vermont.



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Differences Between Winter & Summer Vacationers

Those who described a winter vacation seem to be younger, more outdoor-oriented and aware of Vermont than those who described a summer vacation.

Winter Vacationers

More likely than those who described a summer/fall vacation to...

- Describe a Vermont vacation
- Be from NYC metro or MA
- Be younger than 40
- Be single
- Be employed full-time
- Have a household income of \$100K+
- Stay 2 nights on vacation
- Stay in a house / condo
- Vacation with friends
- Do outdoor activities on vacation
- Want to be seen as “adventurous”, “outdoorsy”, “spontaneous” and “youthful”
- “Unspoiled landscape” is more important
- Go to destination websites for planning

Summer Vacationers

More likely than those who described a winter/spring vacation to...

- Describe a non-Vermont vacation
- Be 40 or older
- Have only a high school diploma
- Be married/partnered
- Be retired or unemployed
- Have a household income of \$100K or less
- Stay 1 to 2 weeks on vacation
- Vacation with spouse and/or children
- Shop or do cultural activities on vacation
- Want to be seen as “conservative”, “urban”, “rational” and “mature”
- Go to a travel agent for planning
- Views more attributes to be “co-owned” leaving fewer important attributes “open”
- Not have noticed ads for Vermont

How Are Multi-seasonal Vacationers Different?

Of respondents that vacationed in Vermont, 34% vacationed in both the winter/spring and summer/fall seasons. These folks are more likely to have easier / inexpensive access to Vermont.

Seasons Vacationed in Vermont	MORE Likely Than Other Vermont Vacationers	LESS Likely Than Other Vermont Vacationers
Winter/Spring & Summer/Fall <i>(34% of VT vacationers)</i>	<ul style="list-style-type: none"> Be residents of Vermont and Massachusetts Be 41-50 Stay 2 nights Spend \$50 to \$99 traveling to Vermont Want to be seen as “active”, “adventurous” (compared with summer only) and “rational” (compared with winter only) 	<ul style="list-style-type: none"> Be residents of Canada metro Stay at a hotel or motel Spend \$300 to \$999 traveling to Vermont
Winter/Spring only <i>(34% of VT vacationers)</i>	<ul style="list-style-type: none"> Have HHI under \$100K Want to be seen as “spontaneous”, “passive” (compared with multi-season) and “Youthful” (compared with summer only) 	<ul style="list-style-type: none"> Be residents of Vermont Participate in cultural activities
Summer/Fall only <i>(32% of VT vacationers)</i>	<ul style="list-style-type: none"> Be residents of Canada metro Be 51 - 60 Married Stay at a campground Want to be seen as “conservative” and “passive” (compared with multi-season) and “rational” and “mature” (compared with winter only) Go to commercial travel websites and/or travel agents for vacation planning information 	<ul style="list-style-type: none"> Be single Vacation with friends Stay at house or condo Do outdoor activities Notice ads for Vermont (compared with multi-season)

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- **Target people who haven’t vacationed in Vermont**
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Differences Between VT and Non-VT Vacationers

There are a few demographic differences between those who have vacationed in Vermont and those who have not.

Vacationed in Vermont

More likely than those who don't vacation in Vermont to...

- Describe a winter vacation
- Be from MA
- Want to be seen as “adventurous”, “outdoorsy”, “spontaneous”, “thrifty”, “independent” and “idealistic”
- Be 31-40
- Have a household size of 2
- Have a graduate degree
- Be employed full-time
- Have a household income \$150K+
- Stay for 2 nights
- Vacation with their spouse and/or friends
- Stay in a B&B / inn
- Do outdoor activities on vacation
- Go to online sources and family & friends for vacation planning information
- View “unspoiled landscape” as a less important attribute when considering winter destinations
- View “not crowded” to have similar importance to “good value”, “warm friendly people” and “easy to get to”
- View the image of the ski slope & barn as clearly more relevant than other winter images

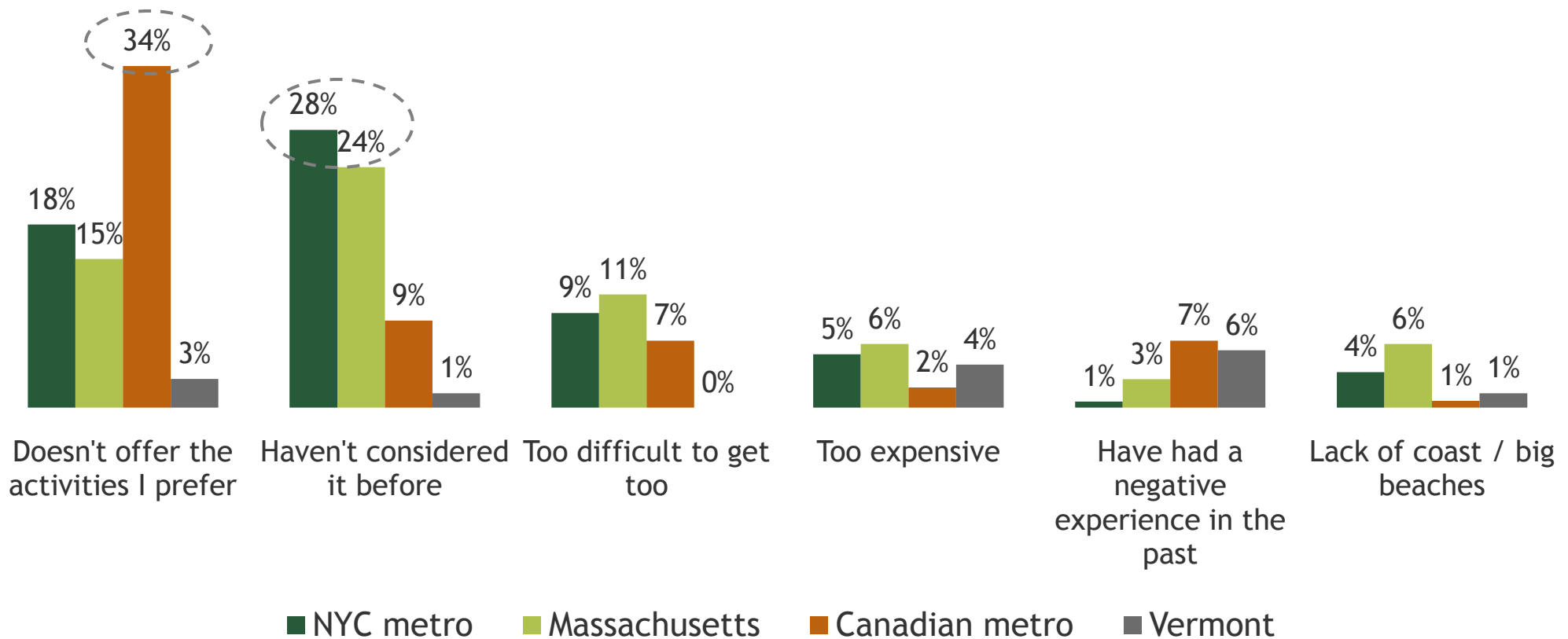
Not Vacationed in Vermont

More likely than those who vacation in Vermont to...

- Describe a summer vacation
- Be from Canada metro
- Want to be seen as “conservative”, “urban”, “rational”, “mainstream”, “practical” and “extravagant”
- Live alone or have a household size of 5 or more
- Have a high school diploma or GED or some college
- Be a homemaker or unemployed
- Have a household income less than \$100K
- Stay for more than a week
- Vacation alone
- Stay in a hotel / motel
- Spend \$1,000+ at the destination
- Spend \$300+ travelling to the destination
- Relax, shop and do cultural activities on vacation
- View the image of the ski slope & barn, bridge & river and bridge & snowmobile to have similar relevance
- View the lake image as more relevant
- Not have noticed Vermont ads

Reasons for Not Vacationing in Vermont

About a quarter of NYC metro and Massachusetts residents who have not vacationed in Vermont, have not done so because they “haven’t considered it before”, while a third of Canadians feel Vermont “doesn’t offer the activities I prefer”.



Reasons that received less than 5% responses include: lack of nightlife, too cold, inconsistent availability of wireless coverage/service, unpredictable snow conditions, have heard negative things about it, unpredictable weather conditions

Those Who Haven't Considered Vermont

Those who haven't considered vacationing in Vermont seem to prefer the shore, are younger and less educated. Specifically, they are different from other non-VT vacationers in that they are...

Vacations

- More likely to go to the Cape and Mid-Atlantic shore but less like to have vacationed in ME
- More likely to go to family and friends as a vacation planning resource

Demographics & Attitudes

- More likely to be unemployed, have a high school diploma or GED, less than 50
- More likely to want to be seen as “adventurous”

Vermont Awareness from Ads

- No difference in awareness of Vermont ads

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NYC Metro: Looking for a luxury escape

NYC Metro

Includes New York City
and suburbs of CT, NJ,
and NY



- Doesn't view "free" in "you're free to come as you are", "sun-drenched dock", "savoring sweet strawberries", "fun" "reading" or "reconnect" as relevant or not relevant to VT

Looking for luxury escape

- More likely to want to be seen as "extravagant" (compared with MA & VT), "elegant" (compared with VT), and "conservative" (compared with MA)
- More likely have a household income >\$100K (compared with VT & Canada metro)
- More likely to spend \$1,000+ at their destination (compared with MA)
- More likely to vacation for 1 to 2 weeks (compared with MA & VT)
- More likely to stay in a house/condo (compared with Canada metro & VT)
- Less likely to be married (compared with VT)
- Top 5 vacation destinations excluding VT: Mid-Atlantic shore, Adirondacks, Poconos, other destinations, West Coast
- Views image of snowmobile & bridge as most relevant winter image
- Doesn't view image of church as very relevant
- 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"

MA: Looking for practical, outdoor weekend trips

Massachusetts

Includes all of
Massachusetts,
not just Boston



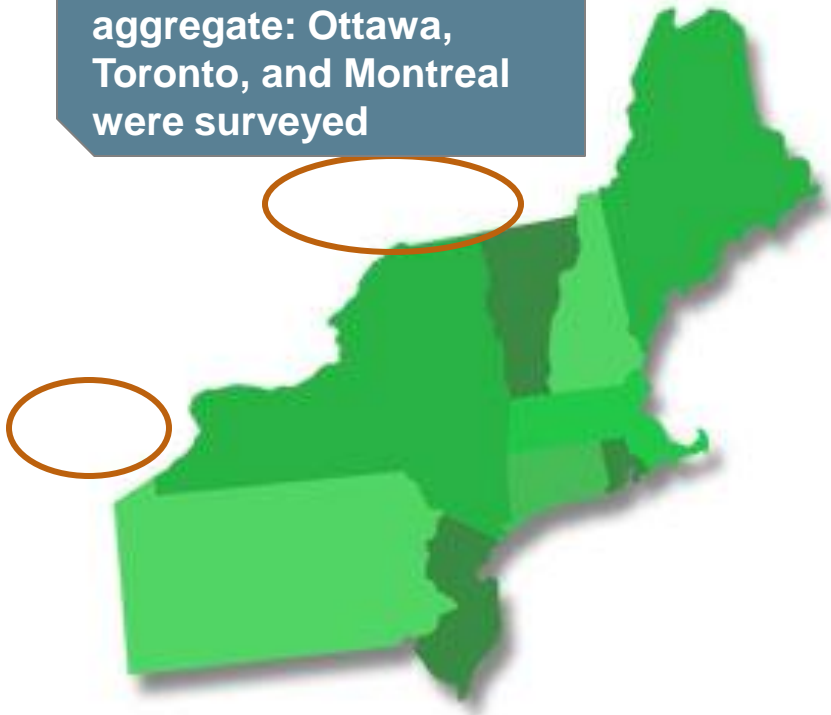
- Clearly views “reconnect” as not relevant to VT
- Doesn’t view “heavy” in “heavy wool blankets”, “hearty stew”, “sun-drenched dock”, “spirit” or “unassuming” as relevant or not relevant to VT

Looking for practical, outdoor weekend vacations

- More likely to want to be seen as “thrifty” (compared with NYC & Canada metro) and “adventurous” (compared with NYC metro)
- More likely to participate in outdoor activities
- More likely to take 2-night vacations
- More likely to stay in a house/condo (compared with Canada metro & VT)
- More likely have a household income >\$100K (compared with VT)
- Less likely to spend \$1,000+ at their destination (compared with NYC & Canada metro)
- Top 5 vacation destinations excluding VT: NH, ME, Cape Cod & the Islands, RI, other destinations
- Views “Not crowded” and “easy to get to” as more important compared to other vacationers
- Views VT to co-own “unspoiled landscape” and lead “environmentally-minded”
- Views the image of the farmers’ market as the most relevant summer image
- Views image of snowmobile & bridge as more relevant than Canada and VT vacationers

Canada Metro

Canada considered as aggregate: Ottawa, Toronto, and Montreal were surveyed



- The word “adventure” is more polarizing
- “Sun-drenched docks” is relevant for Canadian but not for other regions
- Doesn’t view “heavy wool blankets”, “free” in “you’re free to come as you are”, “fresh tracks”, “Nor’easters”, “counting stars” or “reconnect” as relevant or not relevant

Looking for luxury vacations in Canada or Northeastern US

- More likely to want to be seen as “people-oriented”, “extravagant” (compared with MA & VT) and “rebellious” (compared with MA & NYC metro)
- More likely to take 1-2 week vacations
- More likely to spend \$1,000+ at their destination (compared with MA & VT)
- More likely to spend \$1,000+ travelling to their destination
- More likely to shop and do cultural activities (compared with MA & VT) on their vacations
- Views “Natural” is a top 5 important attribute while overall winter vacationers do not
- More likely to stay at a hotel (compared with MA & VT)
- Top 6 vacation destinations excluding VT: eastern Canada, western Canada, other destinations, NH, ME, Adirondacks
- More likely to have not noticed ads for Vermont
- “Warm friendly people” is as important as “good value”
- Views VT to lead / co-own “warm, friendly people” with E. Canada

VT: Looking to relax and be seen as outdoorsy

Vermont

Includes all of Vermont



- Doesn't view "savoring sweet strawberries", "sun-drenched dock", "outdoor adventure", "reconnect", "unassuming" or "unpretentious" as relevant or not relevant to VT

Looking to relax and be seen as outdoorsy

- More likely to want to be seen as "outdoorsy" and "natural" and "thrifty" (compared with NYC & Canada metro)
- More likely to "relax" on their winter vacation
- More likely to have a household income <\$50K and not have graduate degree
- More likely to be married and /or female
- More likely to take a day trip or 1-night vacation
- Top 5 vacation destinations excluding VT: ME, NH, Adirondacks, other destinations, RI
- Views VT as much more differentiated than out-of-state vacationers
- Views the images of the covered bridges as more relevant to VT
- Views images of the field with cows and church as clearly more relevant
- Doesn't view the word "upscale" as polarizing

Appendix

- Respondent Profiles
- Vacation Profiles
- Attribute Importance
- Open Space
- Image Relevance
- Word/Phrase Relevance
- Other

Vacationer Demographics by Market (1 of 3)

		NYC Metro	Massachusetts	Canada Metro	Vermont
Gender	Female	56%	52%	48%	62%
	Male	44%	48%	52%	38%
Age	Under 21	2%	1%	2%	3%
	21 - 30	14%	14%	19%	8%
	31 - 40	23%	17%	19%	18%
	41 - 50	26%	26%	21%	26%
	51 - 60	23%	28%	24%	29%
	60+	12%	14%	15%	17%
Race /	Black / African American	4%	1%	2%	0%
Ethnicity	Native American	1%	1%	0%	1%
	Hispanic / Latino	7%	2%	2%	0%
	Asian / Pacific Islander	7%	4%	10%	2%
	White / Caucasian	75%	88%	81%	93%
	Multi-racial	2%	1%	2%	1%
	Prefer not to answer	5%	4%	3%	3%

Significant difference from at least one other market

Vacationer Demographics by Market (2 of 3)

		NYC Metro	Massachusetts	Canada Metro	Vermont
Marital	Single	25%	22%	27%	19%
	Married / Partnered	63%	69%	66%	73%
	Divorced	7%	6%	5%	6%
	Separated	1%	1%	1%	1%
	Widowed	4%	2%	2%	1%
HH Size	Live alone	13%	11%	15%	10%
	2	29%	42%	39%	46%
	3	27%	18%	18%	20%
	4	19%	18%	19%	17%
	5 or more	12%	10%	9%	6%
Education	No high school diploma or GED	1%	0%	3%	0%
	High school diploma or GED	12%	11%	10%	19%
	Some college (didn't graduate)	21%	17%	17%	23%
	College degree	39%	45%	44%	43%
	Graduate degree	26%	26%	27%	15%

Significant difference from at least one other market

Vacationer Demographics by Market (3 of 3)

		NYC Metro	Massachusetts	Canada Metro	Vermont
Employment	Employed full-time	62%	59%	54%	52%
	Employed part-time	7%	7%	7%	8%
	Self-employed	9%	10%	10%	8%
	Student	4%	2%	5%	3%
	Homemaker	4%	6%	5%	8%
	Retired	9%	10%	15%	12%
	Not currently employed	6%	6%	5%	10%
HH Income	Less than \$50,000	13%	18%	18%	37%
	\$50,000-\$74,999	20%	21%	25%	22%
	\$75,000-\$99,999	19%	18%	19%	21%
	\$100,000-\$149,999	21%	18%	20%	8%
	\$150,000-\$199,999	9%	9%	6%	4%
	\$200,000 or more	8%	6%	3%	6%
	Prefer not to answer	10%	9%	9%	3%

Significant difference from at least one other market

Vacationer Demographics by Vacation (1 of 3)

		Vacation in VT	Not Vacation in VT
Gender	Female	51%	56%
	Male	49%	44%
Age	Under 21	1%	3%
	21 - 30	14%	14%
	31 - 40	22%	16%
	41 - 50	23%	27%
	51 - 60	26%	25%
	60+	13%	16%
Race /	Black / African American	1%	3%
Ethnicity	Native American	0%	1%
	Hispanic / Latino	3%	4%
	Asian / Pacific Islander	6%	6%
	White / Caucasian	85%	81%
	Multi-racial	1%	2%
	Prefer not to answer	5%	3%

Significantly different

Vacationer Demographics by Vacation (2 of 3)

		Vacation in VT	Not Vacation in VT
Marital	Single	22%	25%
	Married / Partnered	69%	65%
	Divorced	6%	7%
	Separated	0%	1%
	Widowed	2%	2%
HH Size	Live alone	10%	15%
	2	41%	35%
	3	23%	19%
	4	18%	19%
	5 or more	8%	12%
Education	No high school diploma or GED	1%	2%
	High school diploma or GED	8%	16%
	Some college (didn't graduate)	15%	23%
	College degree	44%	41%
	Graduate degree	32%	18%

Significantly different

Vacationer Demographics by Vacation (3 of 3)

		Vacation in VT	Not Vacation in VT
Employment	Employed full-time	66%	49%
	Employed part-time	6%	9%
	Self-employed	8%	10%
	Student	3%	4%
	Homemaker	4%	7%
	Retired	9%	13%
	Not currently employed	4%	8%
HH Income	Less than \$50,000	16%	22%
	\$50,000-\$74,999	18%	25%
	\$75,000-\$99,999	16%	21%
	\$100,000-\$149,999	19%	17%
	\$150,000-\$199,999	10%	5%
	\$200,000 or more	9%	4%
	Prefer not to answer	12%	5%

Significantly different

Appendix

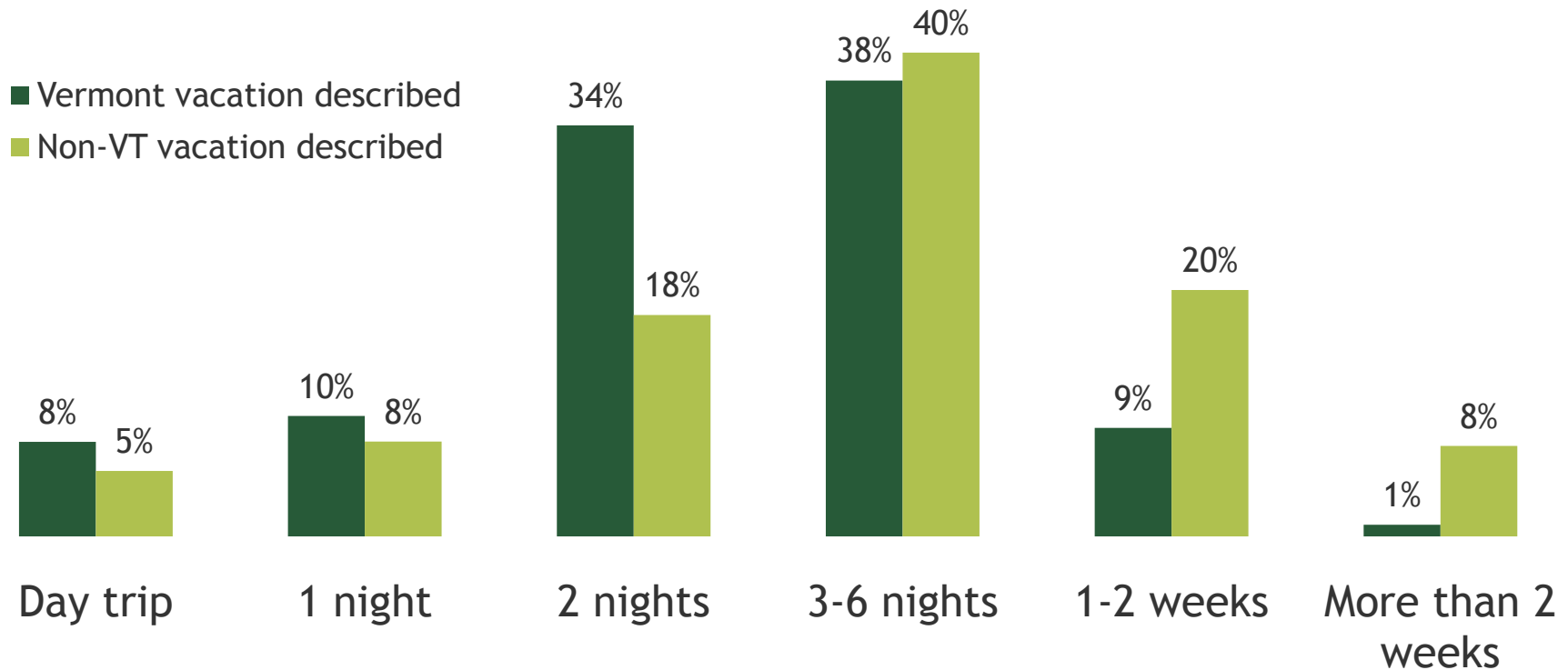
- Respondent Profiles
- **Vacation Profiles**
- Attribute Importance
- Open Space
- Image Relevance
- Word/Phrase Relevance
- Other

Other Destinations

Vacation Destinations: All Vacationers	NYC Metro	Massachusetts	Canada Metro	Vermont
New Hampshire	19%	60%	17%	32%
Maine	19%	51%	17%	46%
Cape Cod & Islands (MA)	18%	50%	9%	16%
New Jersey / Maryland / Delaware shore	47%	19%	15%	11%
Eastern Canada	11%	13%	47%	17%
Rhode Island or Connecticut shore	18%	30%	4%	19%
The Adirondacks / Upstate New York	28%	10%	17%	23%
West Coast	21%	18%	9%	14%
The Rocky Mountains	14%	15%	6%	12%
The Berkshires	11%	20%	2%	6%
Other Mid-Atlantic location	12%	11%	8%	9%
The Poconos	26%	4%	2%	3%
Western Canada	5%	5%	27%	2%
Other New England location	9%	5%	5%	13%
Other location	25%	29%	36%	24%

Length of Vacation

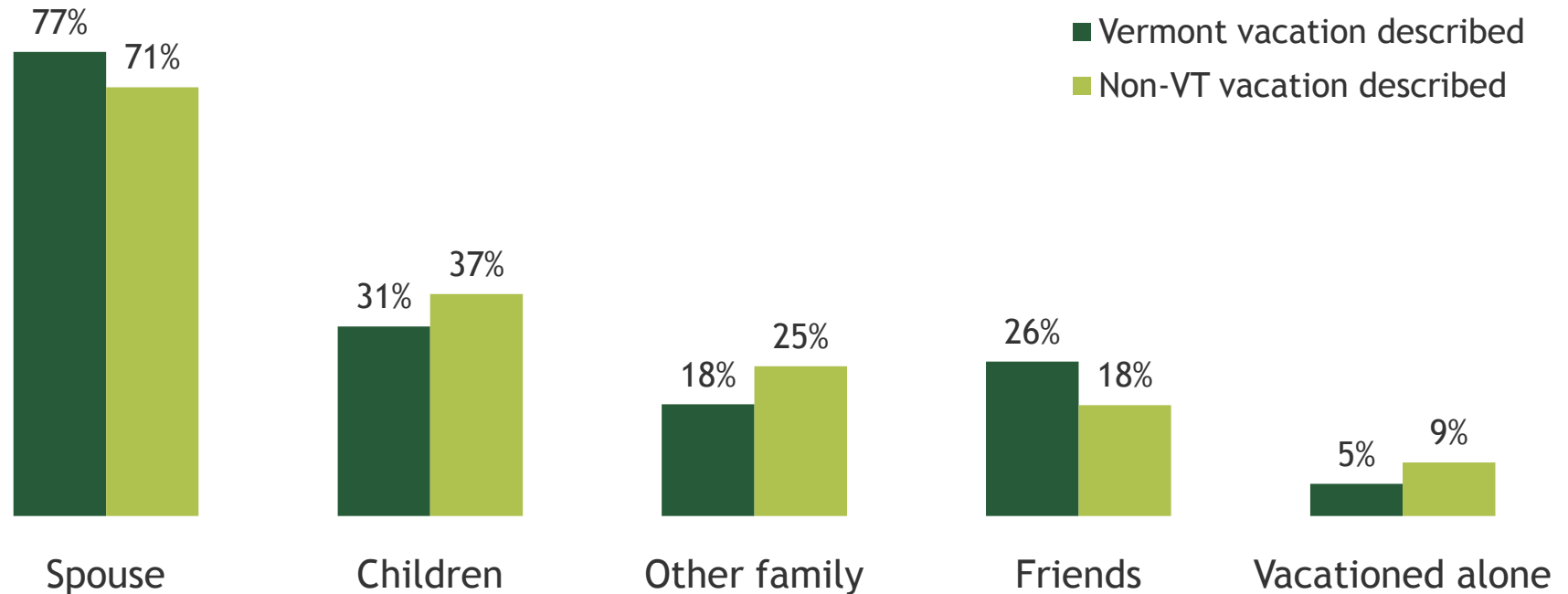
Vacations to Vermont are more likely to be 2-night stays and less likely to be more than a week compared to vacations to other destinations. The majority (65%) of vacations, regardless of location, are 2 to 6 nights in length.



- Winter vacations are slightly more likely to be 2-night stays (29% vs. 21%) and slightly less likely than summer stays (12% vs. 19%) to be 1-2 week stays
- Massachusetts residents are more likely to stay 2 nights (40%)
- NYC and Canada metro residents are more likely to stay 1-2 weeks (18% and 23%)

Vacation Companions

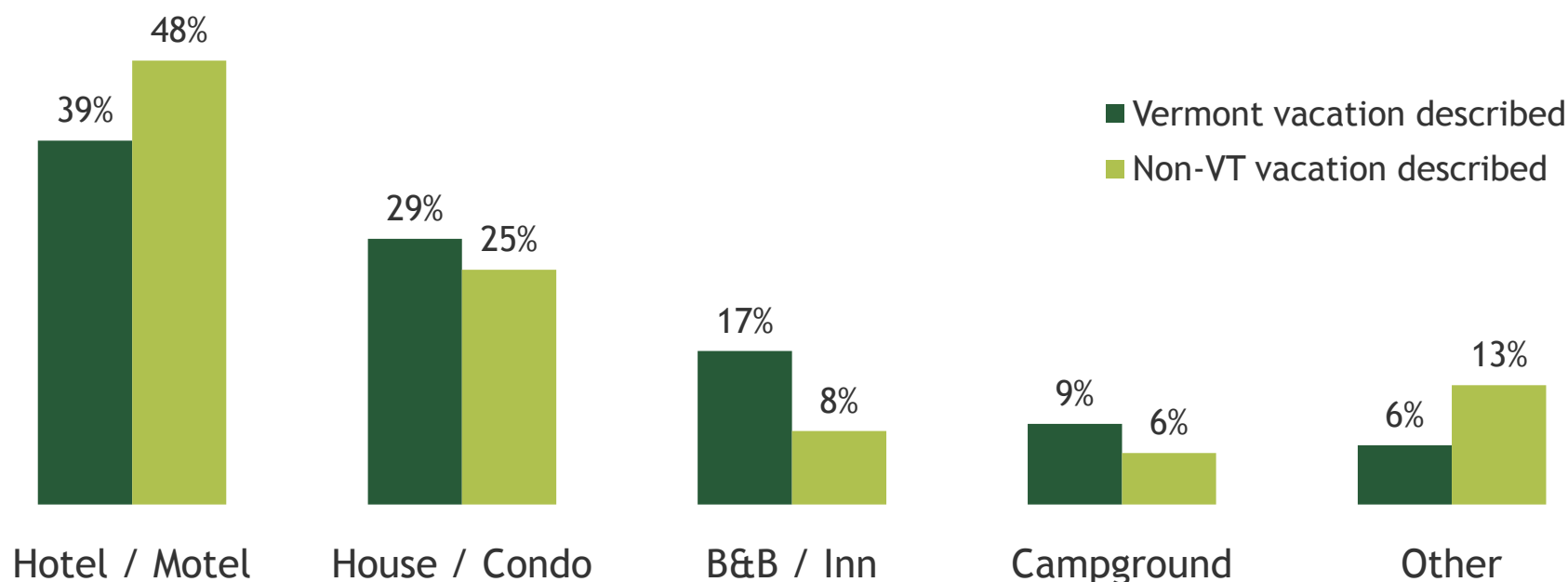
Vermont vacationers are more likely than other destination vacationers to vacation with their spouse and/or friends.



- Winter vacationers are slightly more likely to vacation with their friends (27% vs. 14%)
- Summer vacationers are slightly more likely to vacation with their spouse (77% vs. 72%) and / or children (37% vs. 32%)
- NYC metro residents are more likely to vacation with their children (39%)

Vacation Lodging

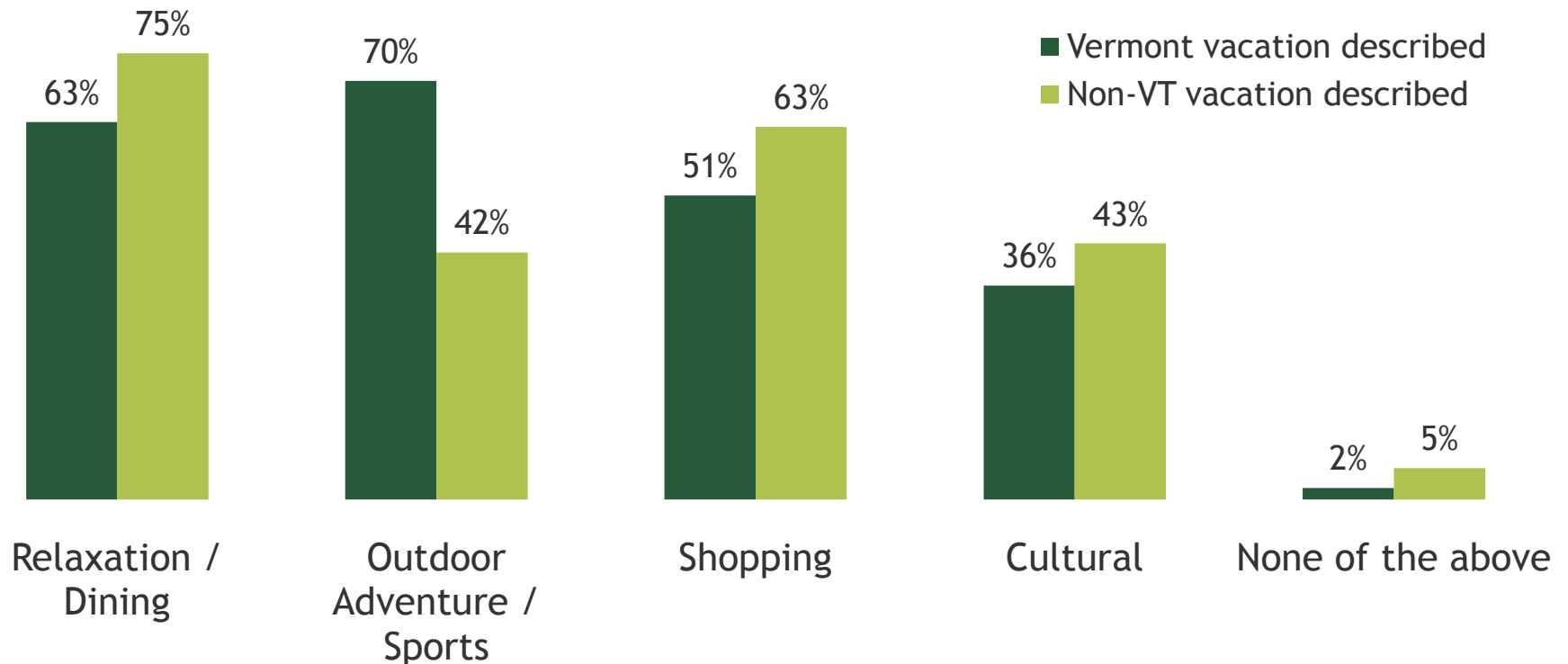
Respondents who vacation in Vermont are more likely to stay in a bed & breakfast or inn and less likely to stay in a hotel or motel than those who do not vacation in Vermont.



- Winter vacationers are more likely to stay at a house or condo (32% vs. 20%) and less likely to stay at a campground (3% vs. 13%)
- Winter vacationers who stay at a hotel/motel or B&B/inn are more likely than summer vacationers to stay at a resort (36% vs. 35%)
- Canada metro residents are less likely to stay at a house or condo (16%)

Vacation Activities

The majority of Vermont vacationers are interested in outdoor adventure and sports and relaxation and dining.



- Winter vacationers are more likely to participate in outdoor activities (63% vs. 44%)
- Summer vacationers are more likely to shop (62% vs. 53%) and participate in cultural activities (48% vs. 34%)
- Canada metro residents are more likely shop while on vacation (70%)

Vacation Activities

Outdoor Activities	Winter/ Spring	Summer/ Fall
Hiking	25%	24%
Camping	9%	10%
Fishing	7%	11%
Mountain / Rock climbing	6%	5%
Viewing a sporting event	5%	4%
Adventure games (e.g., paintball)	4%	1%
Hunting	2%	1%
Picnicking	--	13%
Boating / Water sports	--	12%
Bird / Wildlife viewing	--	10%
Road cycling	--	7%
Running / Jogging	--	6%
Golf	--	4%
Mountain biking	--	3%
Tennis	--	2%
Some type of skiing	42%	--
Alpine skiing	33%	--
Snowboarding	13%	--
Snowshoeing	7%	--
Nordic skiing	6%	--
Ice skating	6%	--
Snowmobile riding	6%	--
Ice fishing	3%	--
Telemark skiing	2%	--
Dog sledding	2%	--
Ice climbing	0%	--
Other outdoor adventure / sport	9%	7%

Significantly different

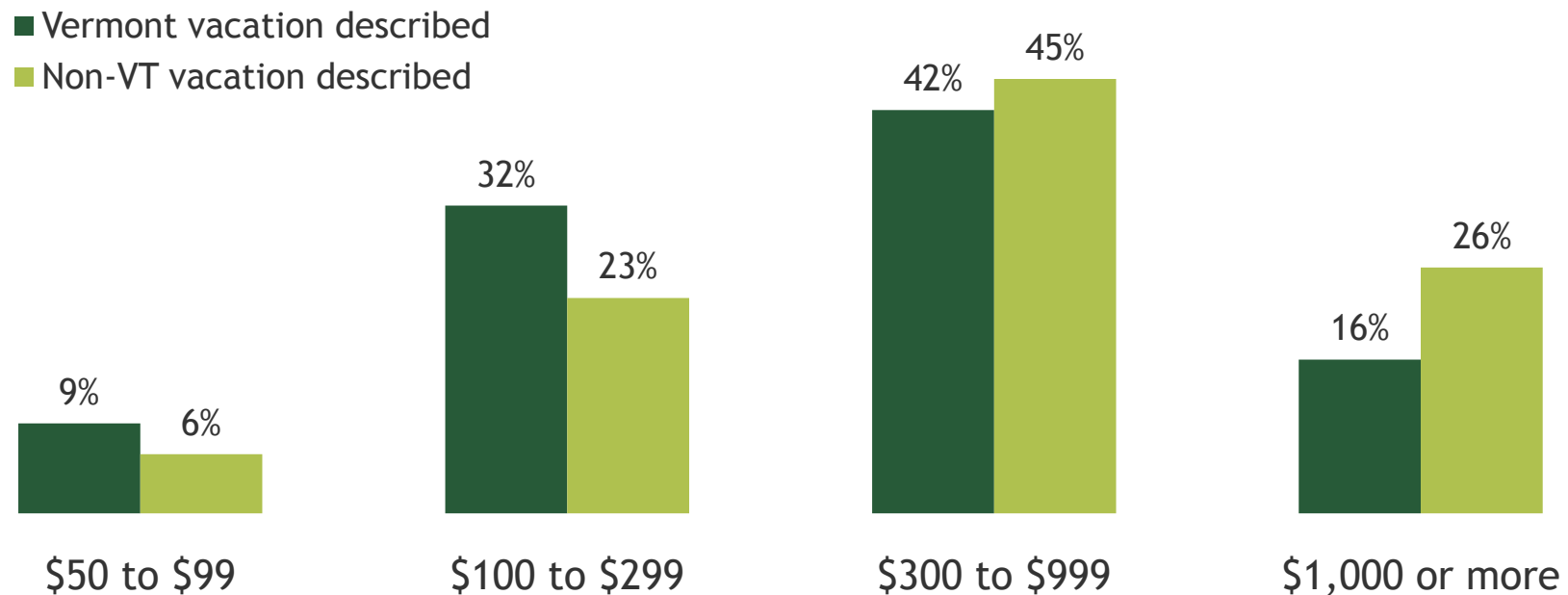
Relaxation / Dining Activities	Winter/ Spring	Summer/ Fall
Dining out	65%	71%
Relaxing	45%	58%
Reading	29%	33%
Engaging in local nightlife	24%	18%
Visiting spa / Retreat	12%	9%

Shopping Activities	Winter/ Spring	Summer/ Fall
Retail items / souvenirs	37%	45%
Local products / crafts (non-food)	34%	44%
Local food products	34%	38%
Antiques	9%	14%
Other shopping	6%	3%

Cultural Activities	Winter/ Spring	Summer/ Fall
Visiting a historic site	24%	32%
Visiting natural attractions / parks	16%	26%
Foliage / Sightseeing / Photogr.	16%	23%
Visiting galleries / museums	17%	22%
Driving back roads	14%	21%
Visiting farm or farmers' market	13%	19%
Visiting an attraction	13%	17%
Attending concerts / music festivals	10%	9%
Attending a fair	9%	11%
Attending a play / theatre	6%	4%
Attending a skill workshop	2%	2%

Vacation Expenses at Vacation Destination

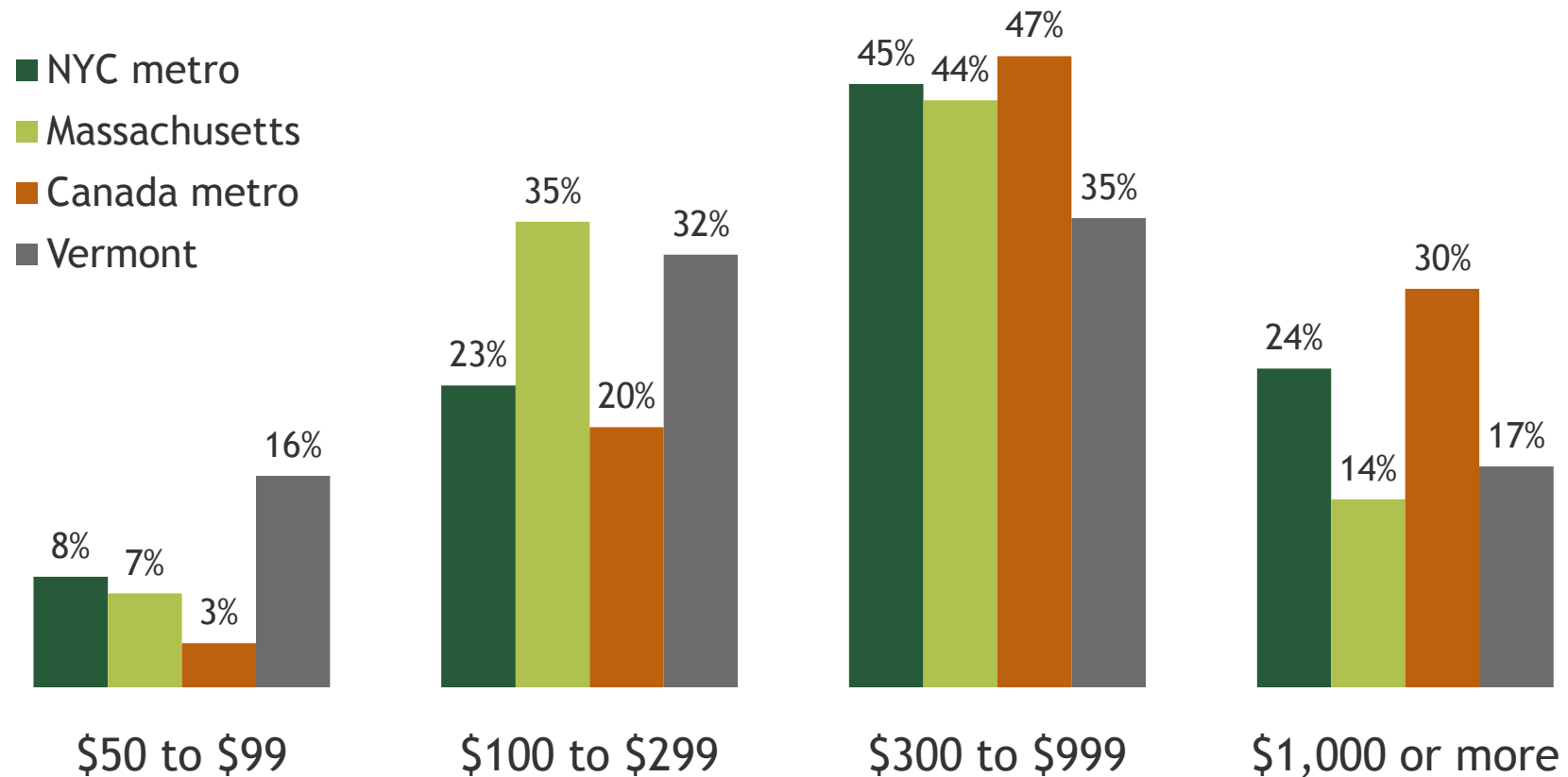
Vermont vacationers are more likely to spend less in Vermont than vacationers who vacation in other places.



- Vermont residents are more likely to spend \$50 to \$99 while on vacation (16%)
- NYC and Canada metro residents are more likely to spend \$1,000 or more on vacation (24% and 30% compared to MA at 14% and VT at 17%)

Vacation Expenses

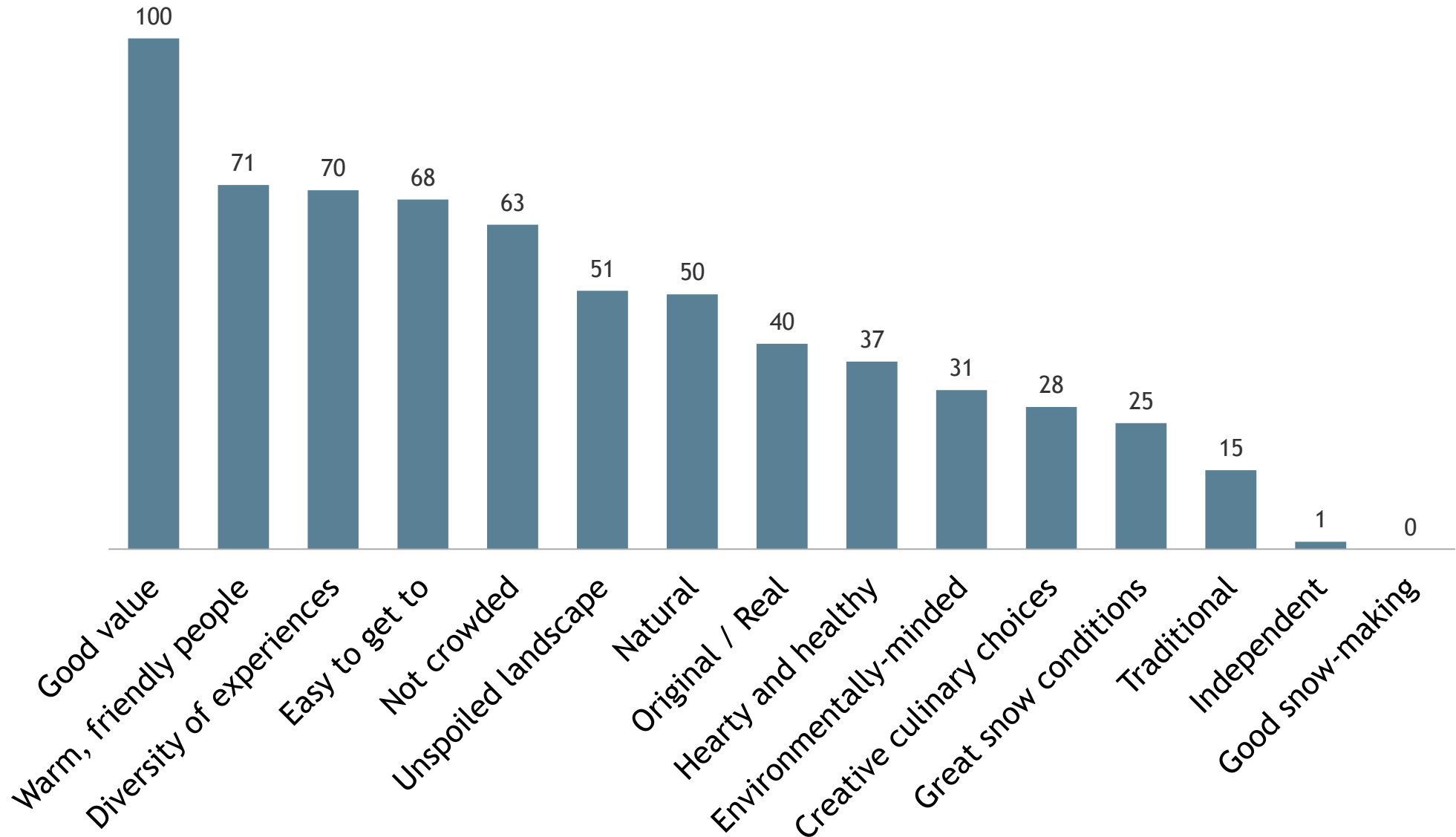
Canada metro residents are more likely to spend over \$300 while at their vacation destination.



Appendix

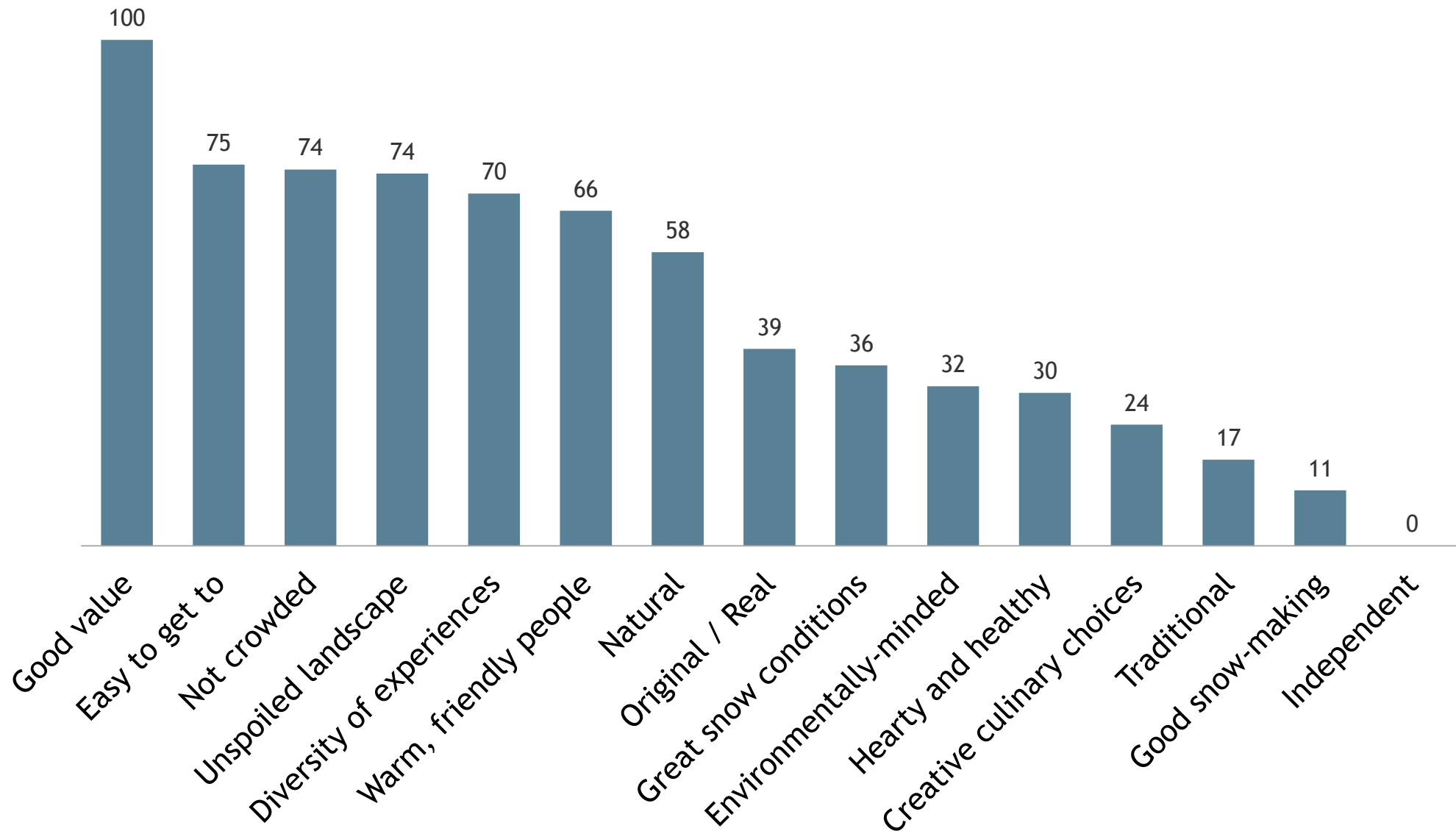
- Respondent Profiles
- Vacation Profiles
- **Attribute Importance**
- Open Space
- Image Relevance
- Word/Phrase Relevance
- Other

Attribute Importance – Winter: NYC



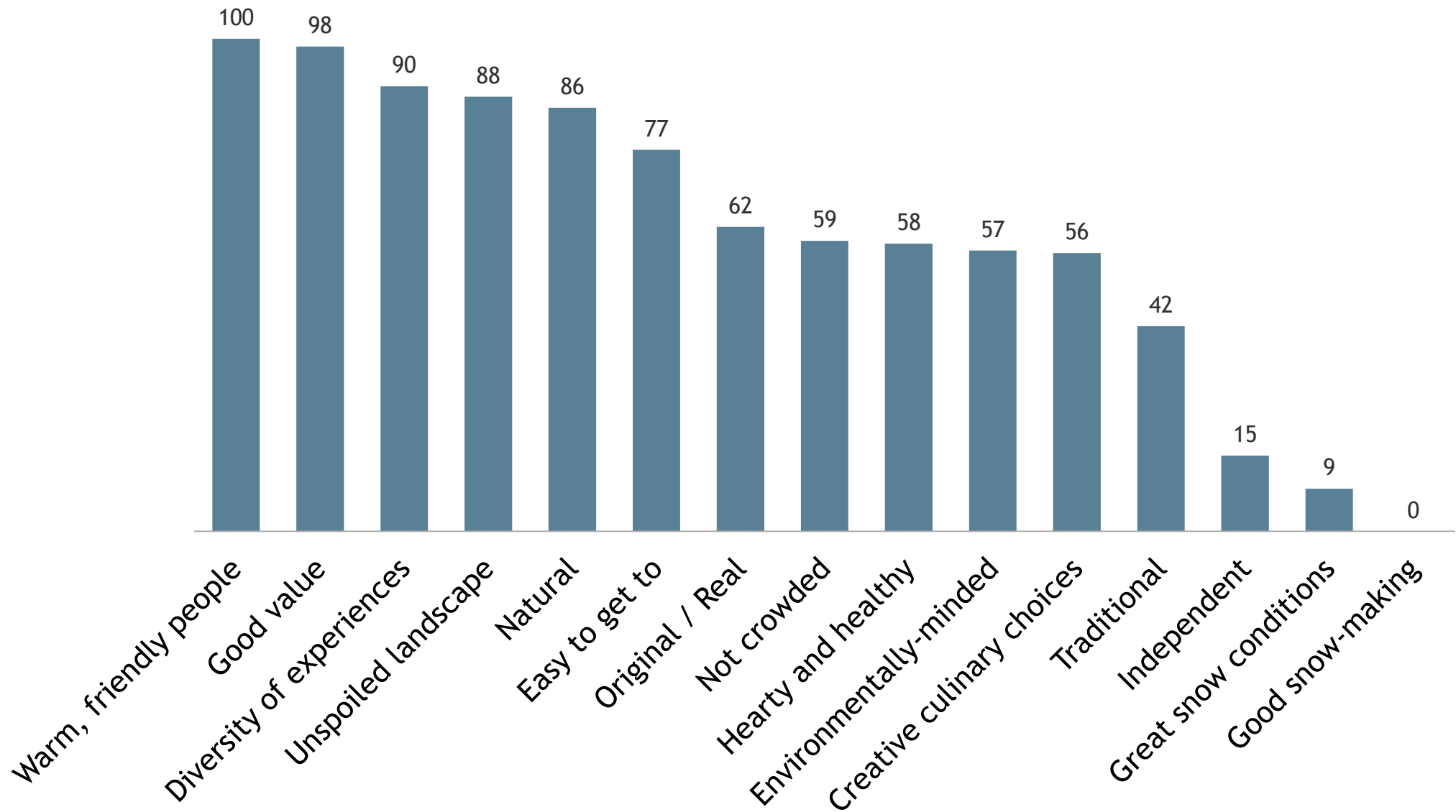
Scale = relative degree of importance

Attribute Importance – Winter: MA



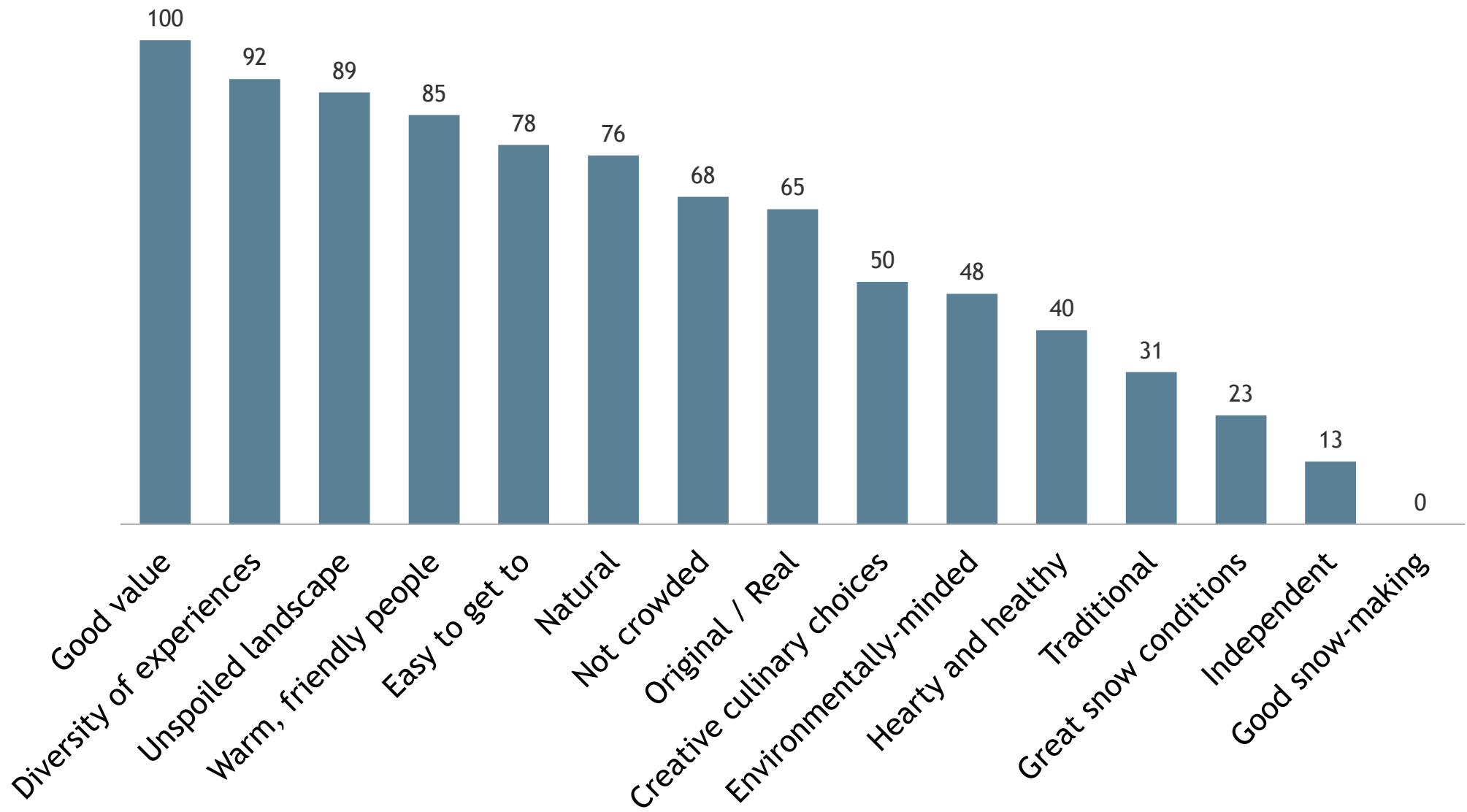
Scale = relative degree of importance

Attribute Importance – Winter: CAN



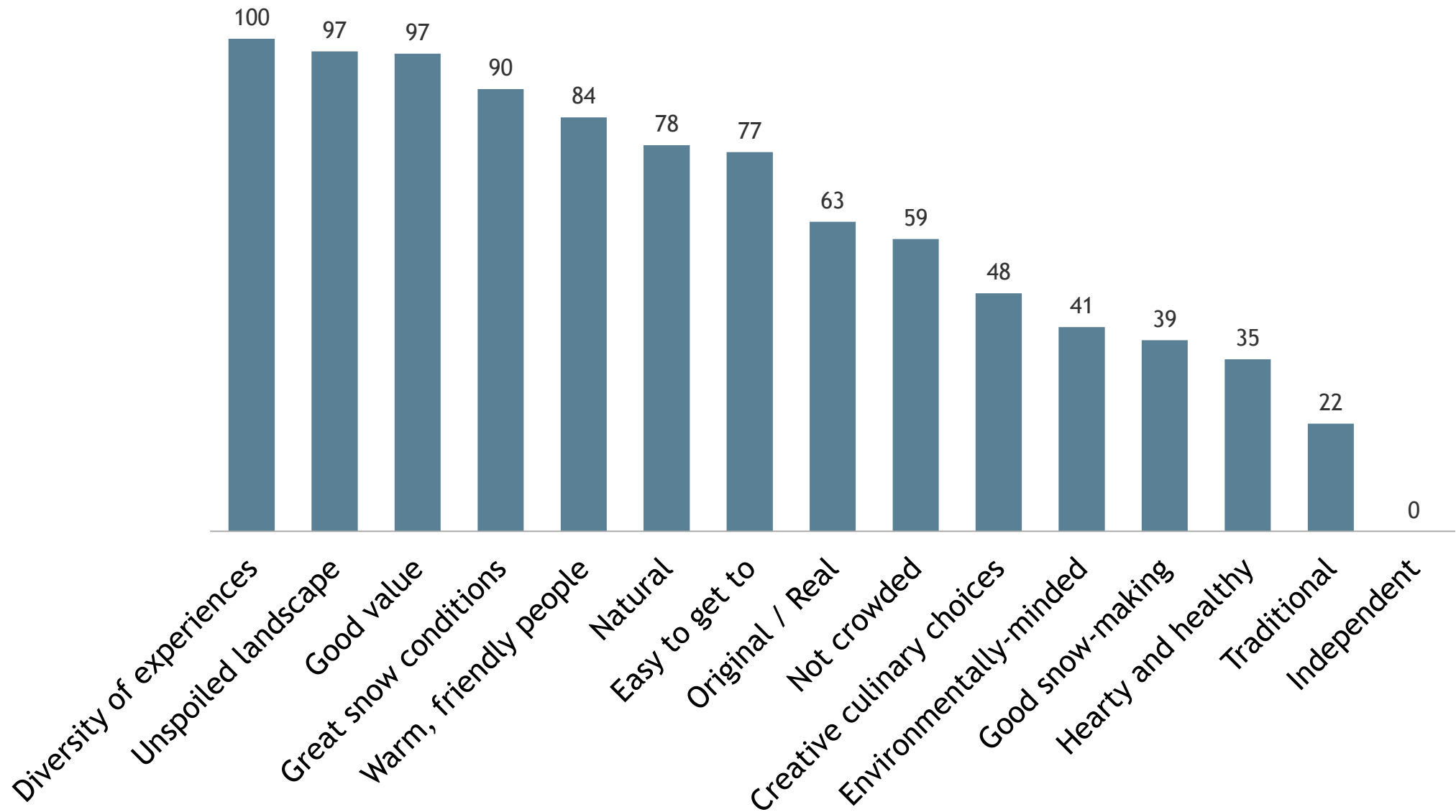
Scale = relative degree of importance

Attribute Importance – Winter: VT Resident



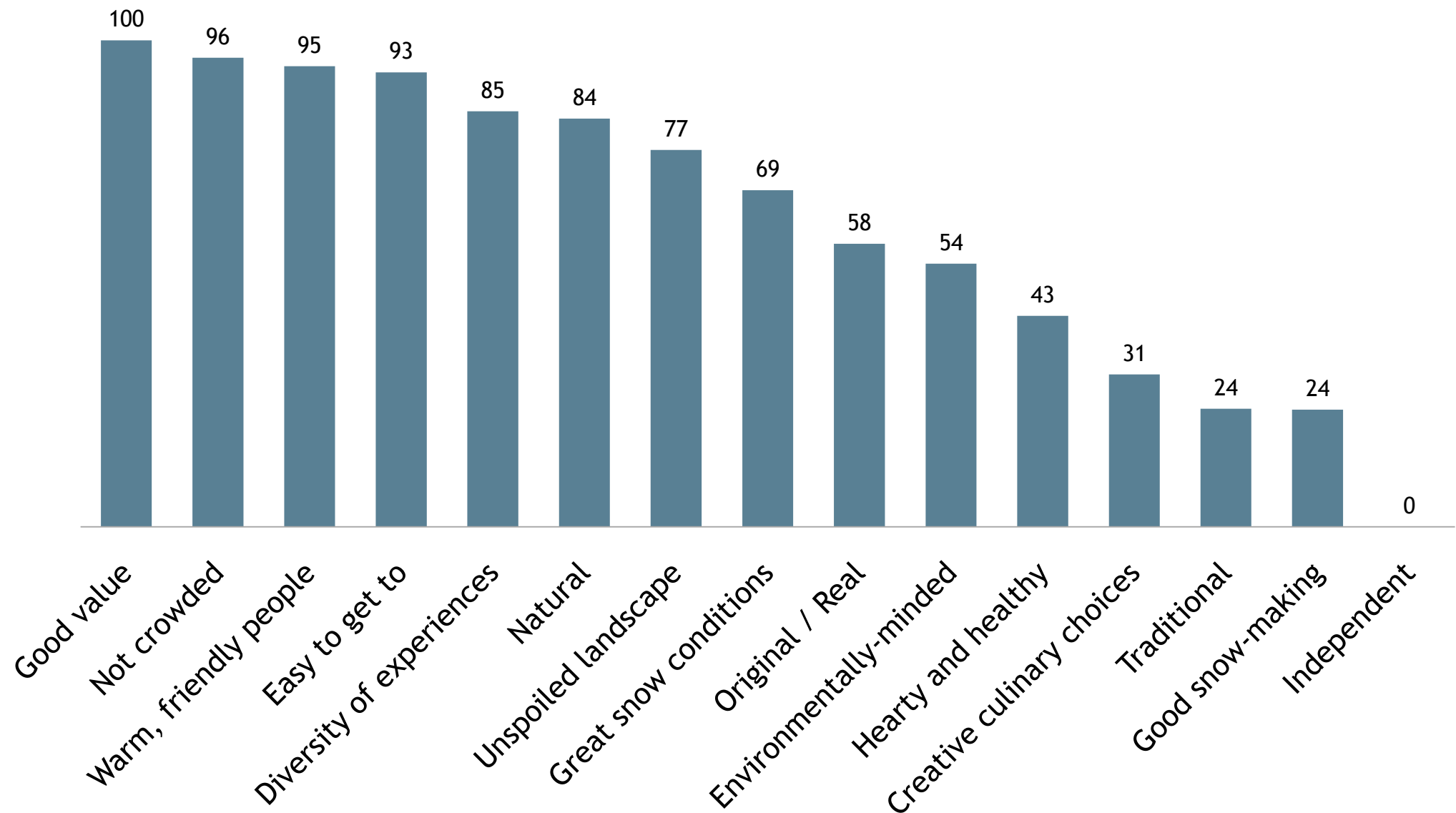
Scale = relative degree of importance

Attribute Importance – Winter: VT Provider



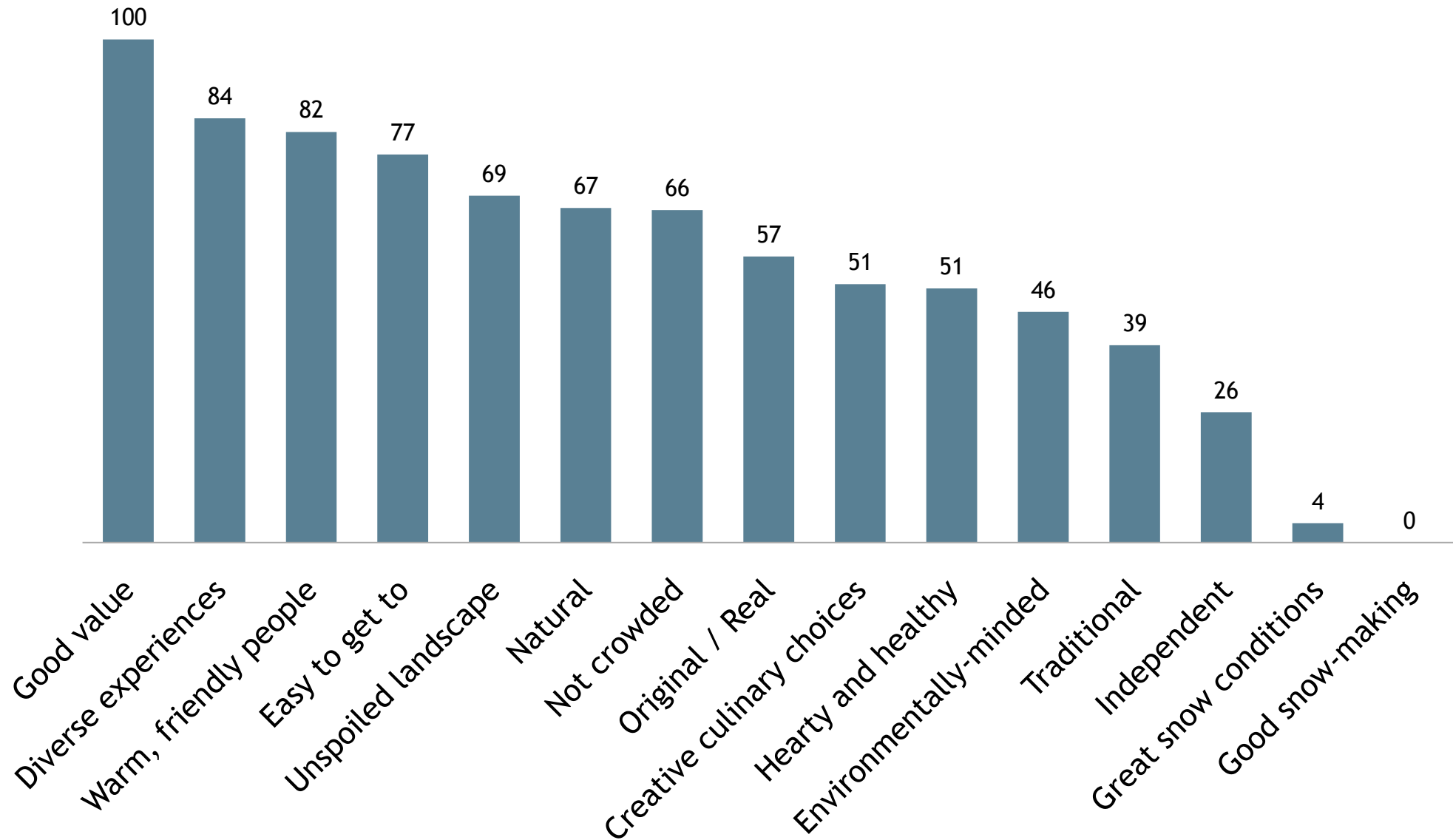
Scale = relative degree of importance

Attribute Importance – Winter: VT Vacation

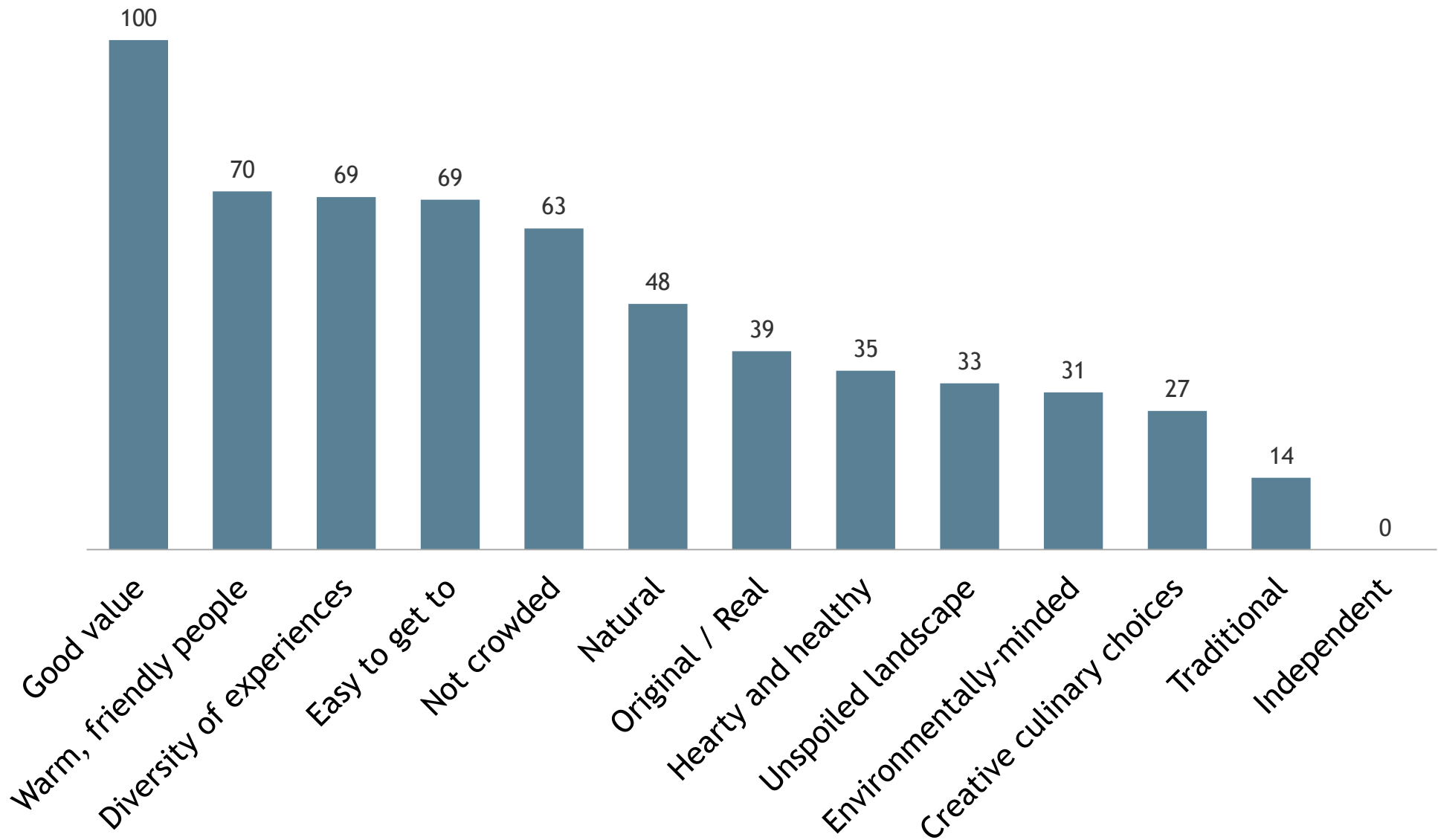


Scale = relative degree of importance

Attribute Importance – Winter: Non-VT Vacation

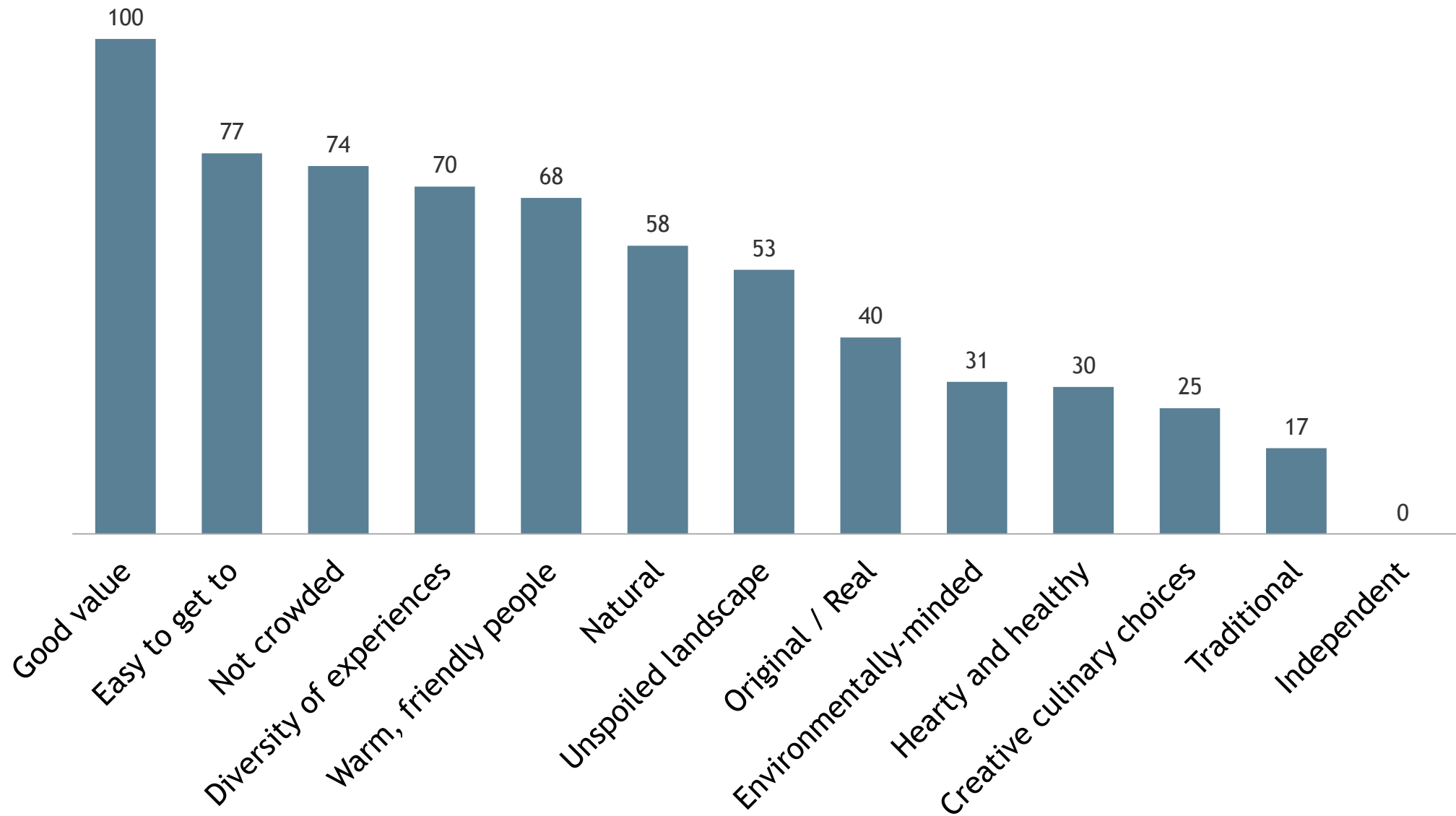


Attribute Importance – Summer: NYC



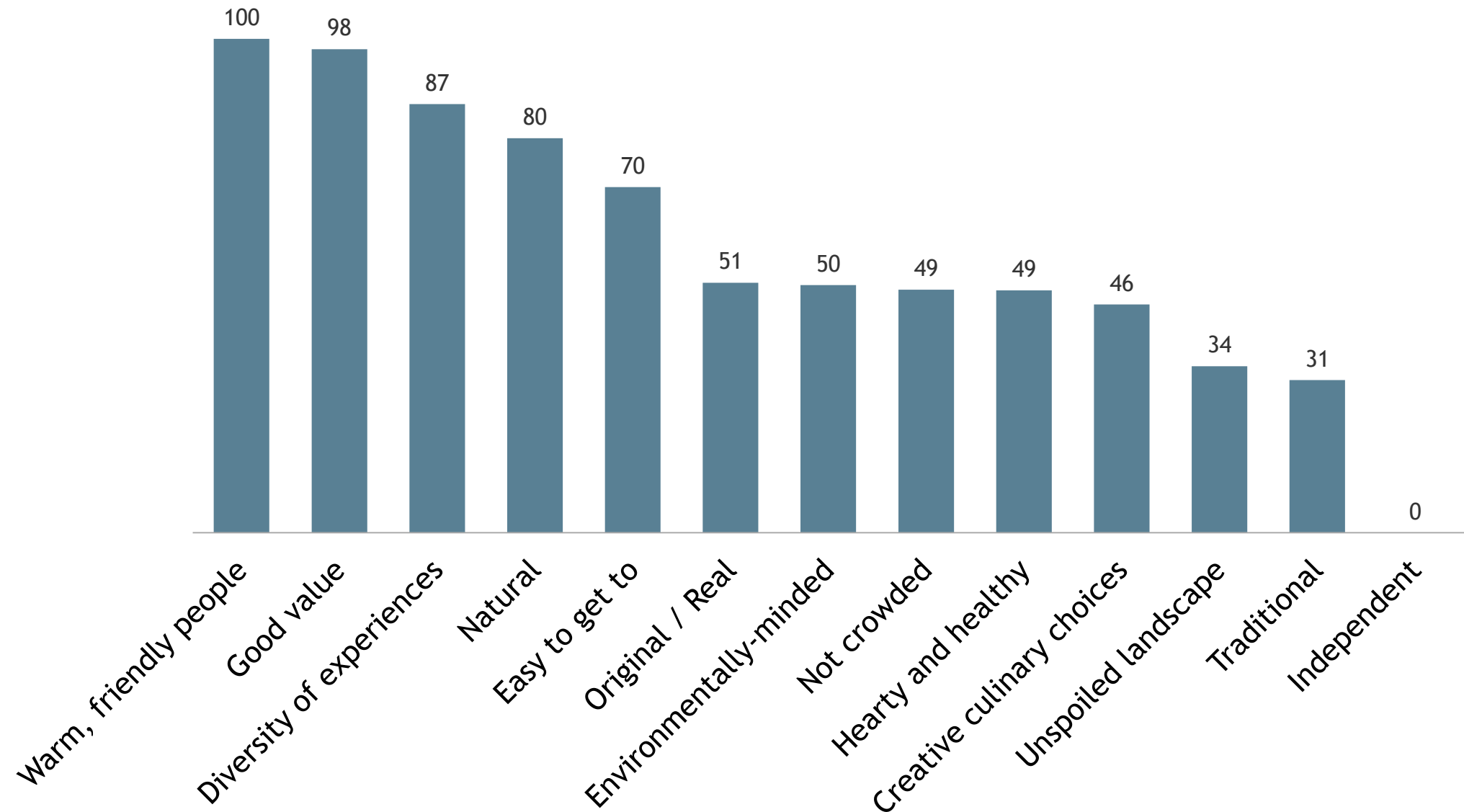
Scale = relative degree of importance

Attribute Importance – Summer: MA



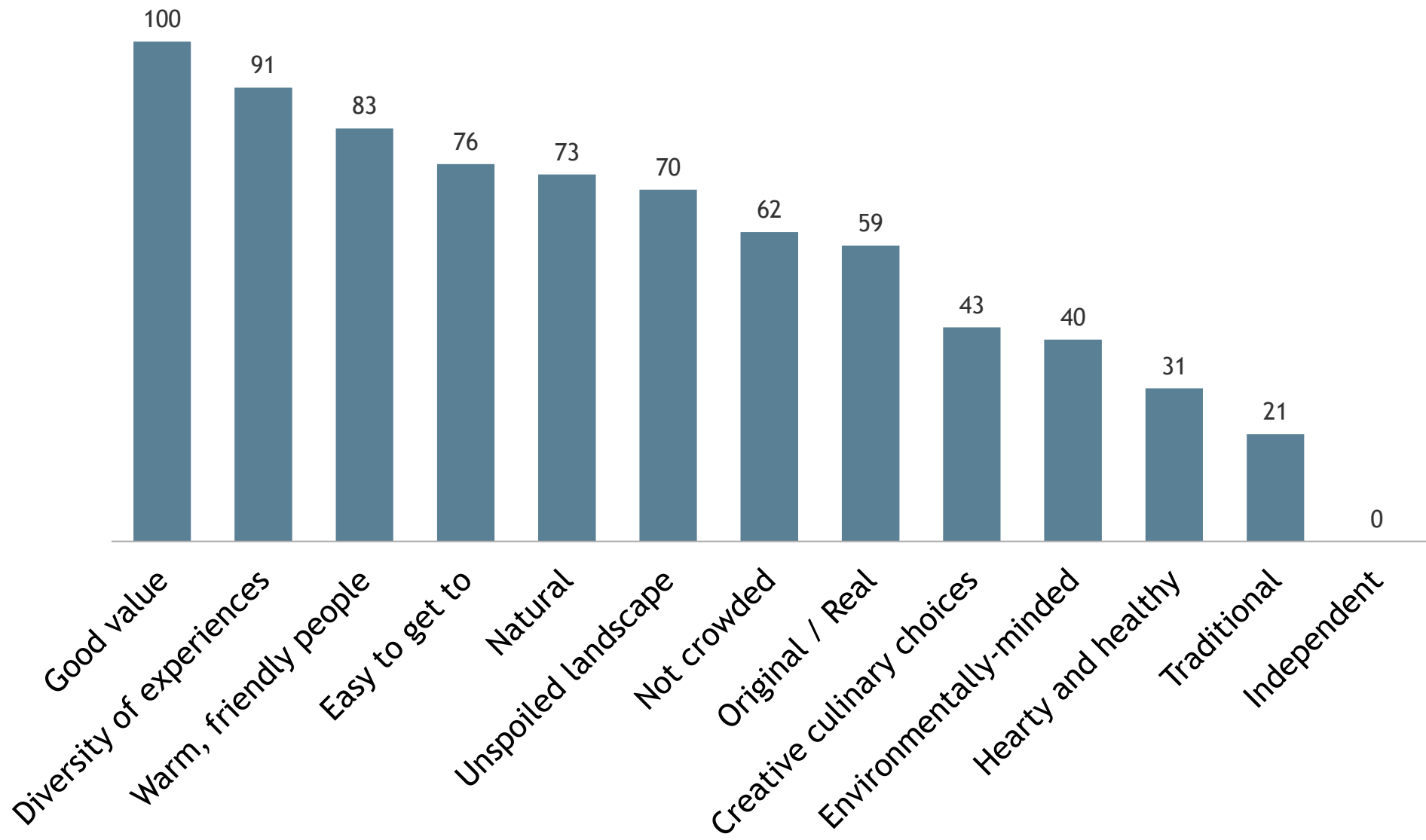
Scale = relative degree of importance

Attribute Importance – Summer: CAN



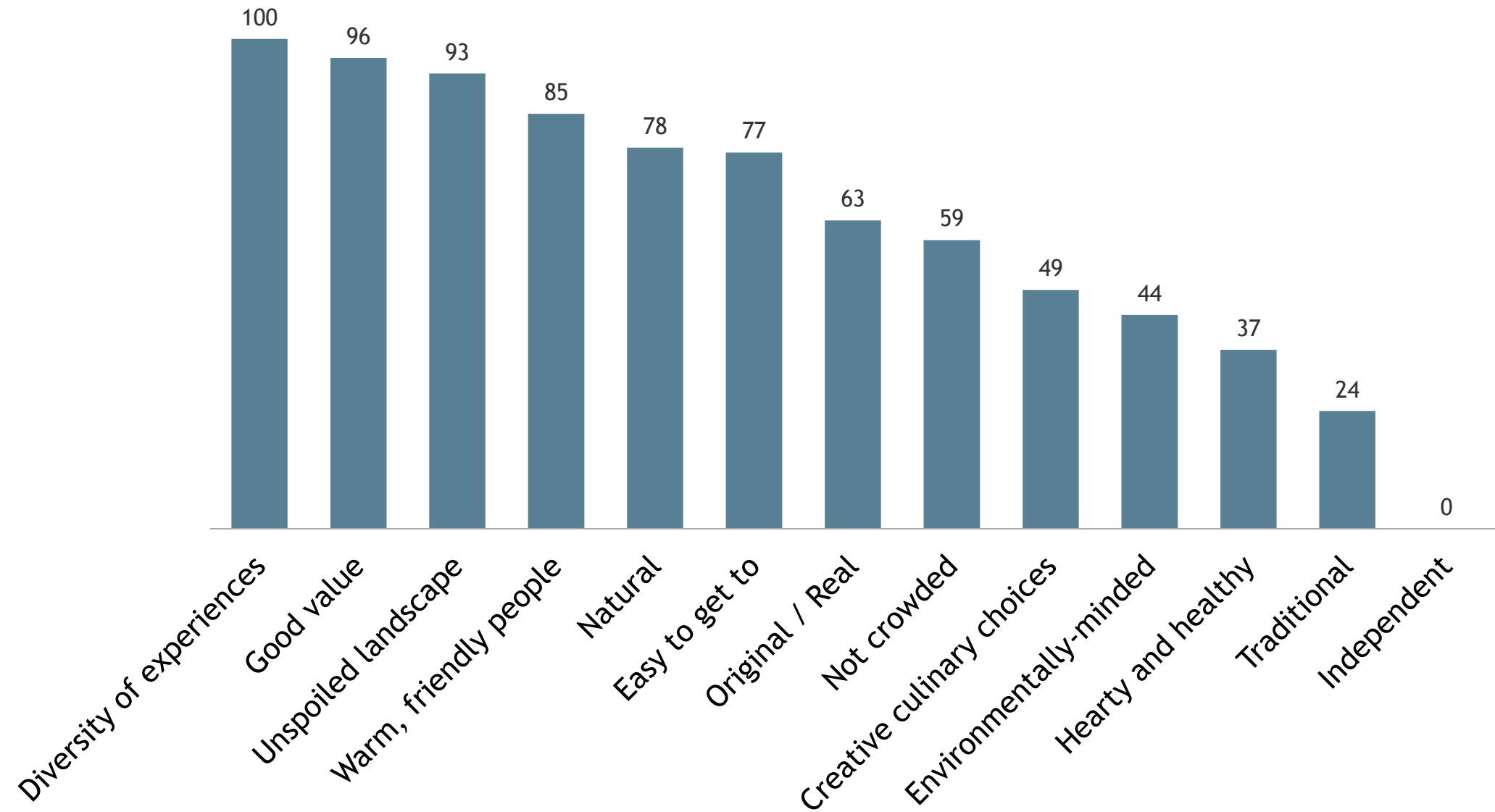
Scale = relative degree of importance

Attribute Importance – Summer: VT Resident



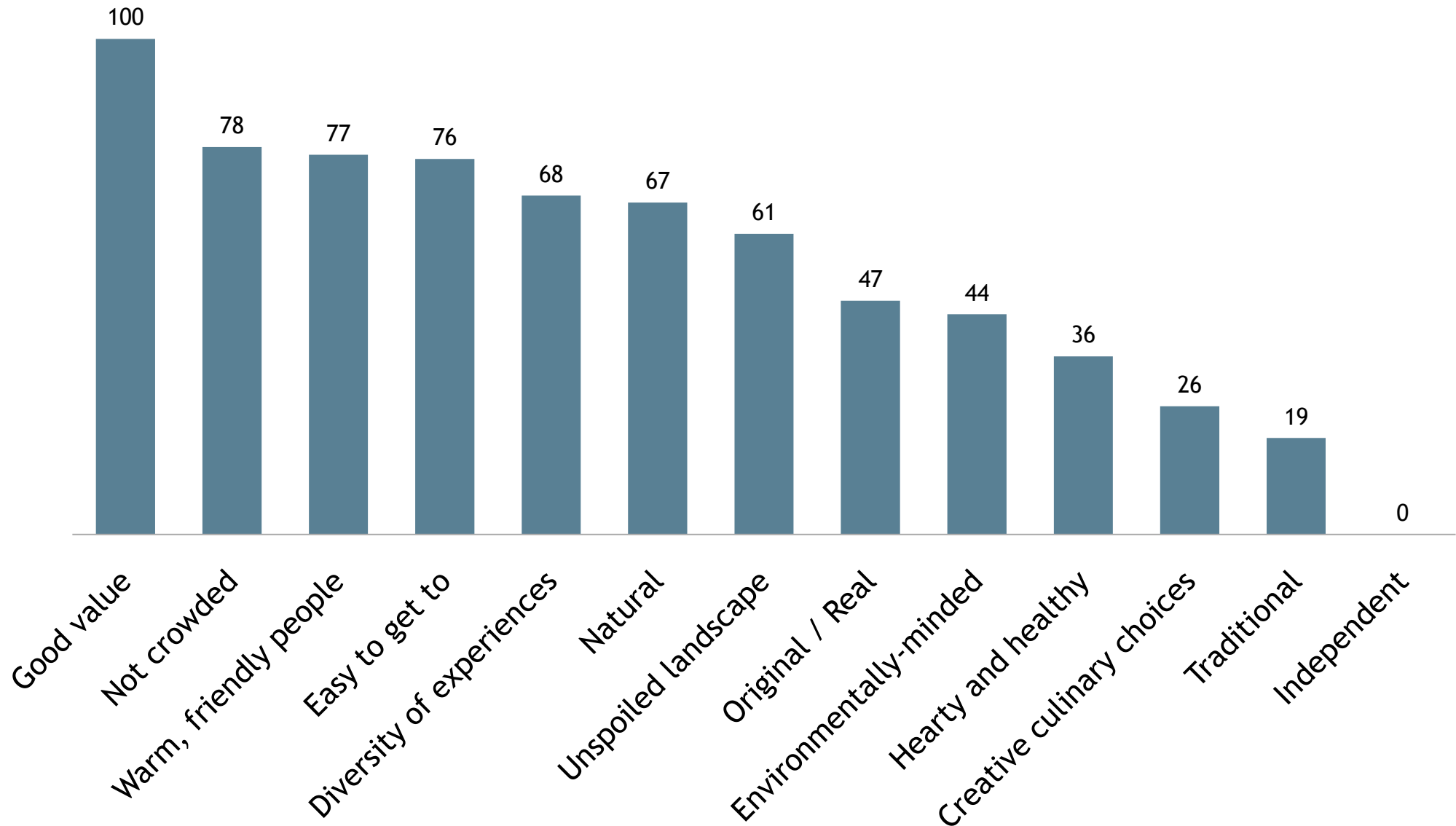
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Attribute Importance – Summer: VT Provider



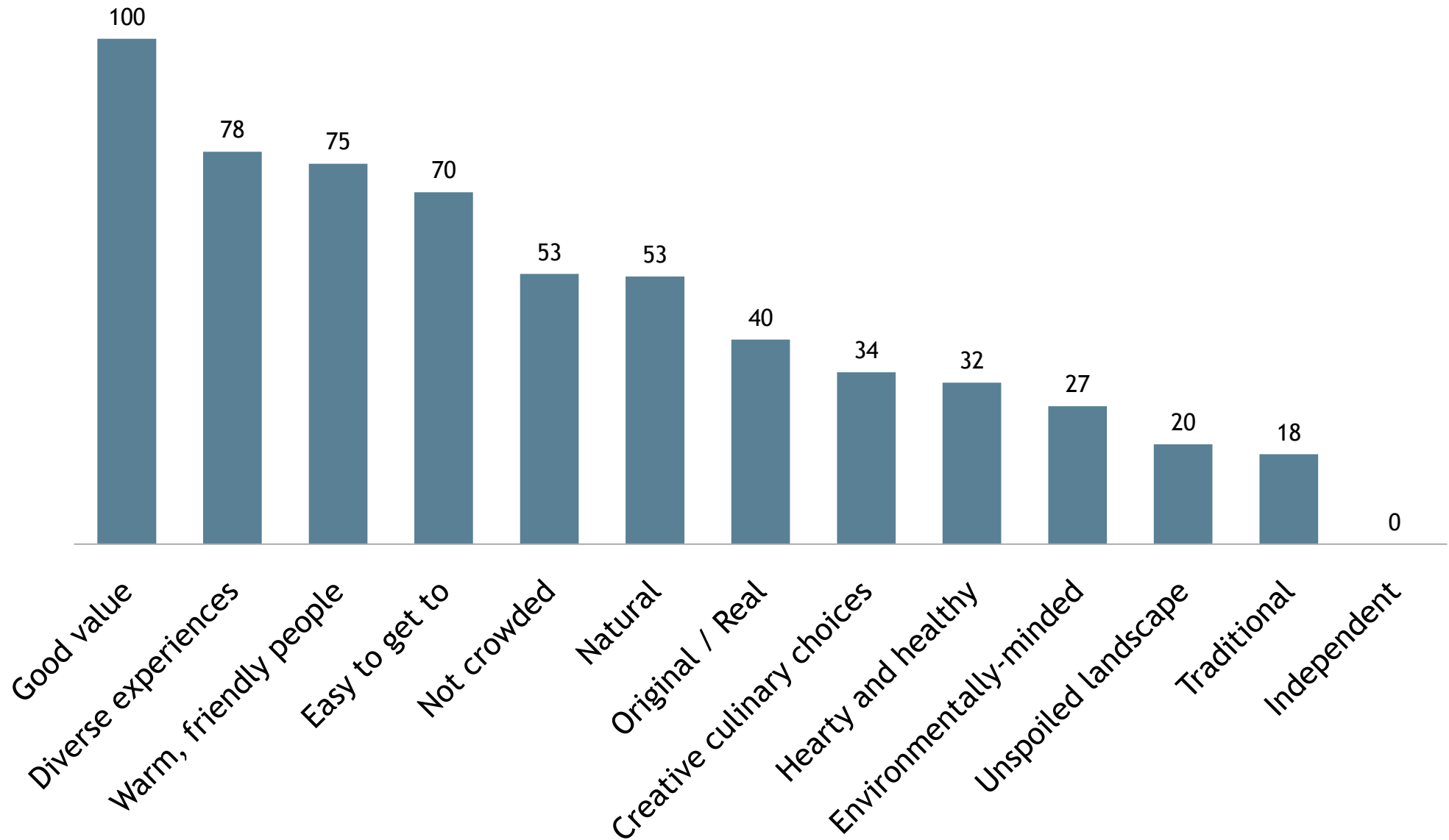
Scale = relative degree of importance

Attribute Importance – Summer: VT Vacation



Scale = relative degree of importance

Attribute Importance – Summer: Non-VT Vacation

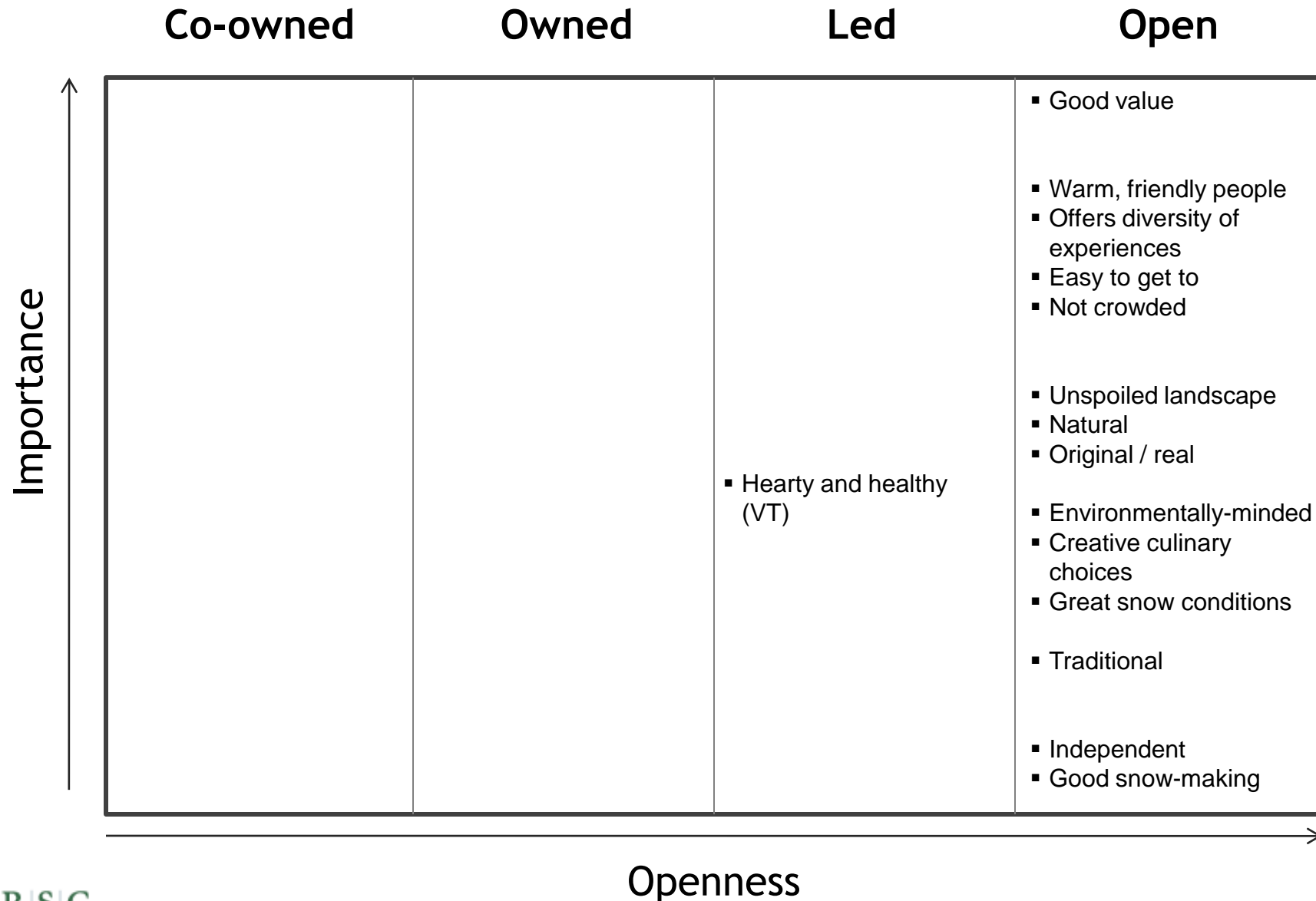


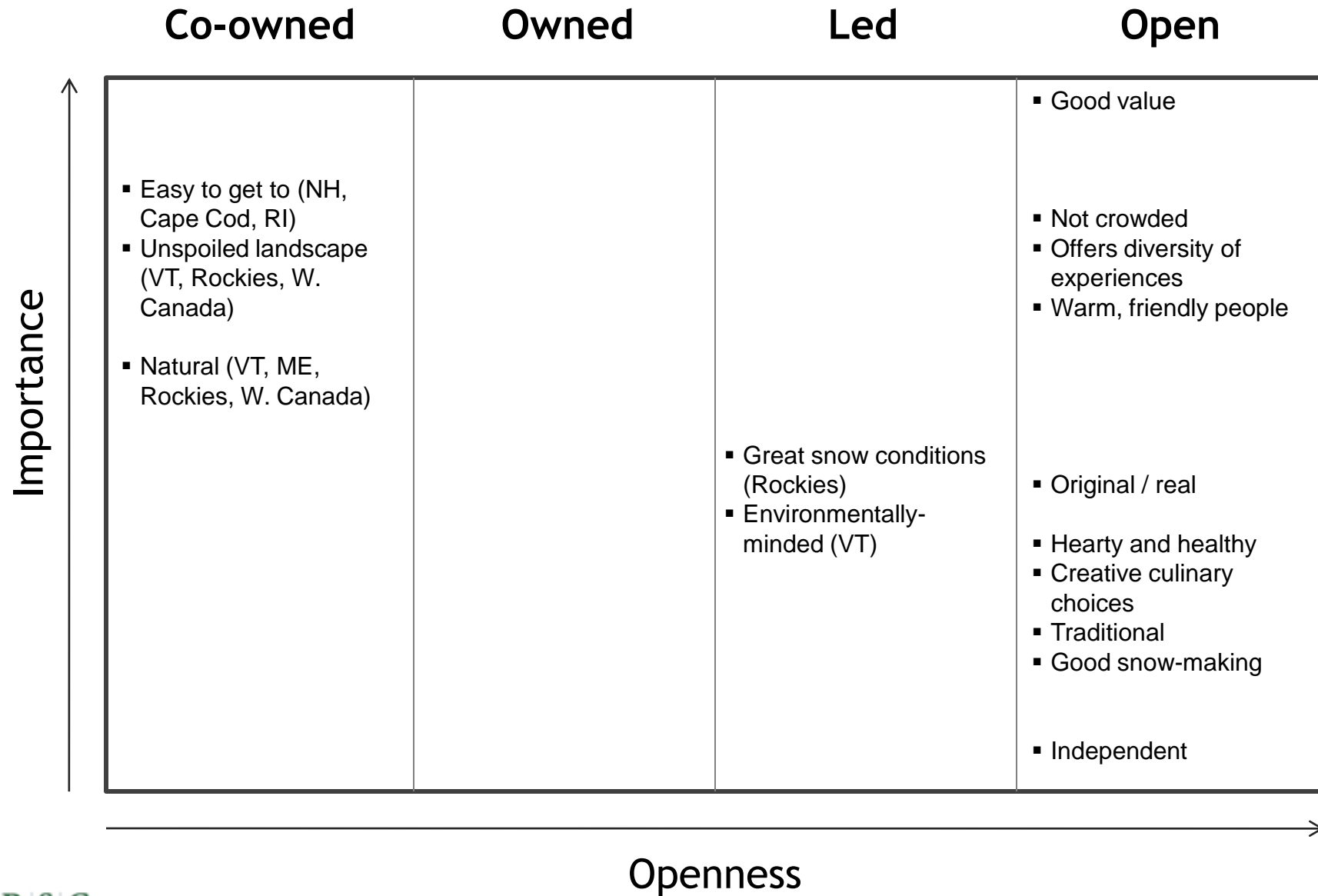
Scale = relative degree of importance

Appendix

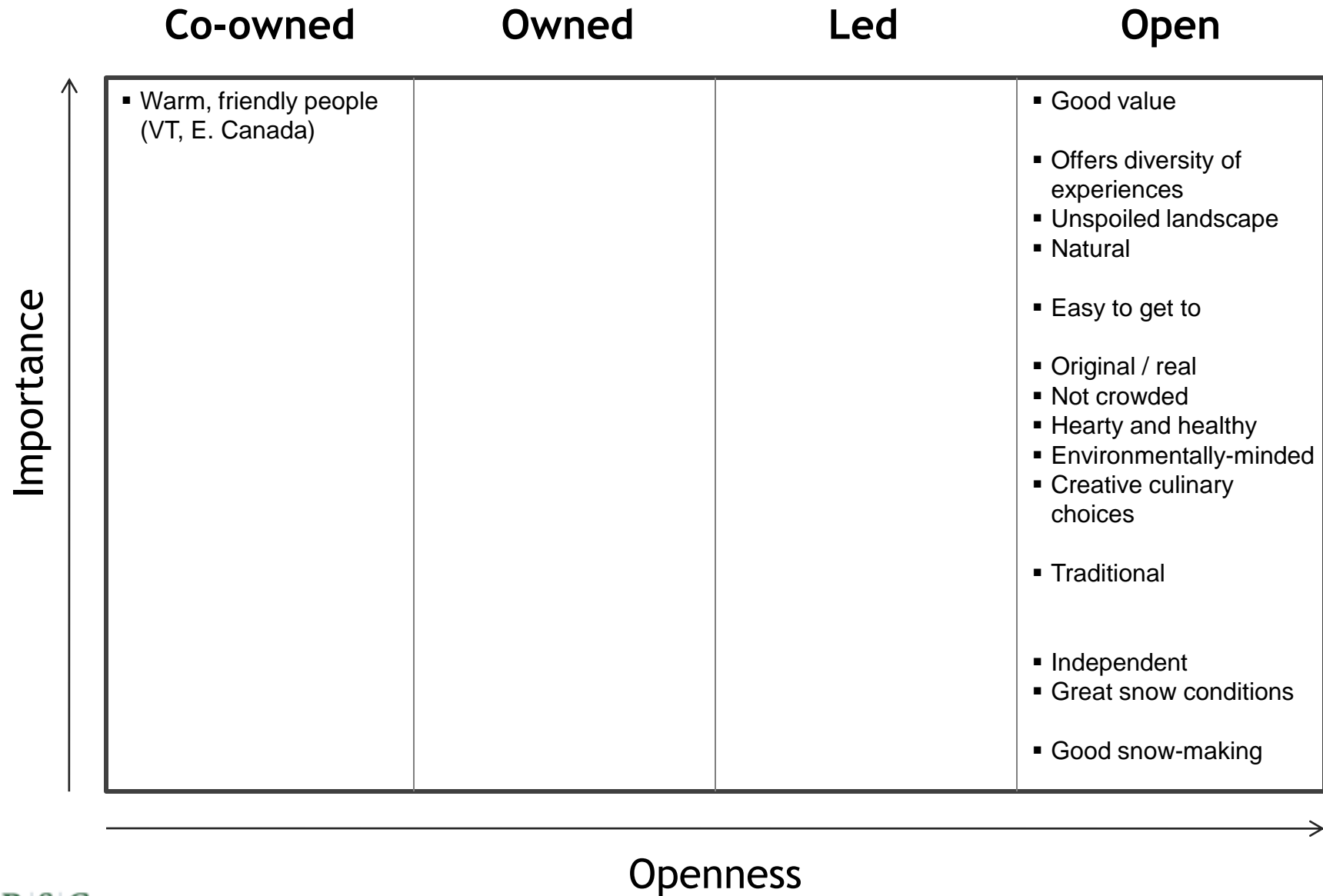
- Respondent Profiles
- Vacation Profiles
- Attribute Importance
- **Open Space**
- Image Relevance
- Word/Phrase Relevance
- Other

OpenSpace – Winter: NYC

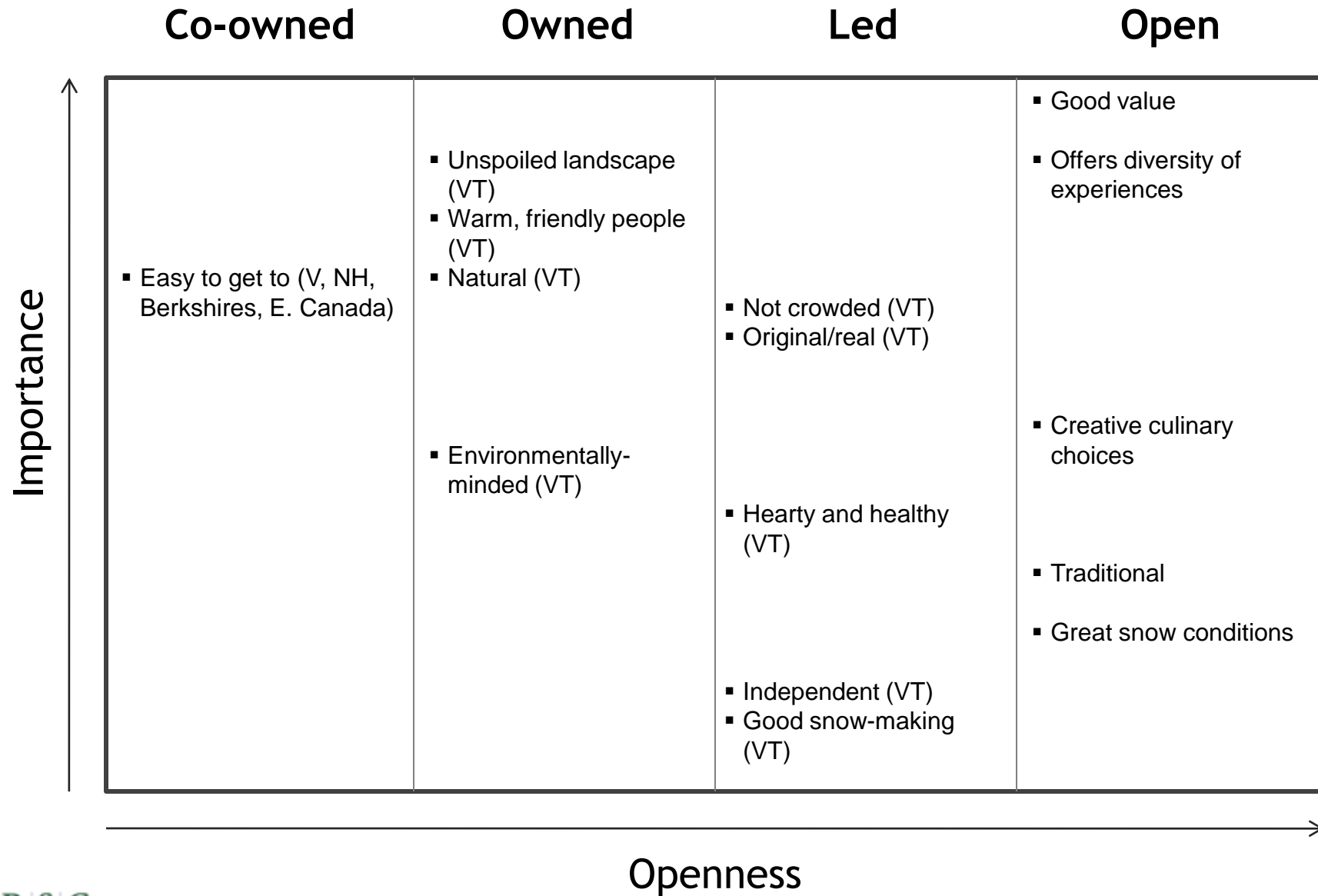




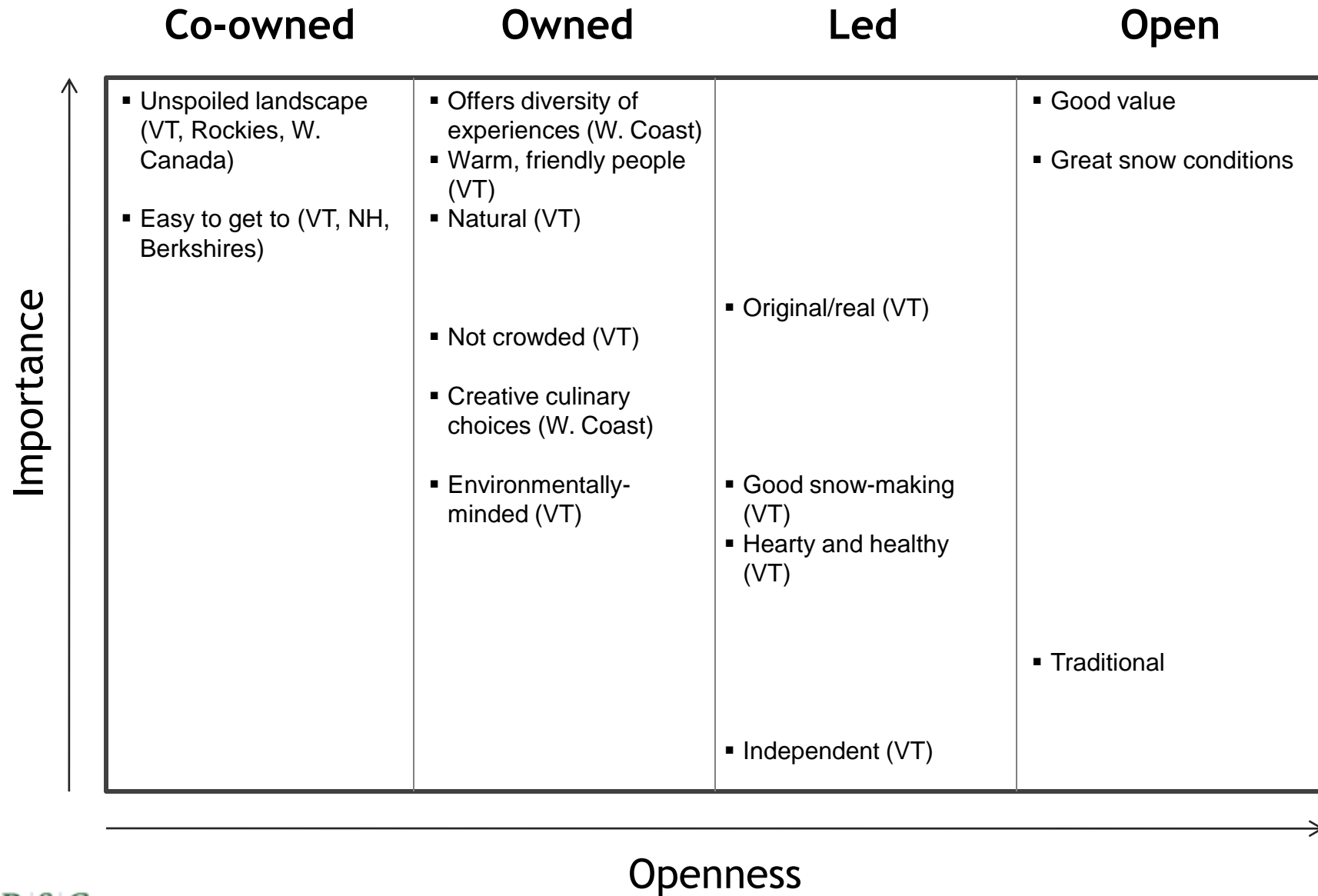
OpenSpace – Winter: CAN



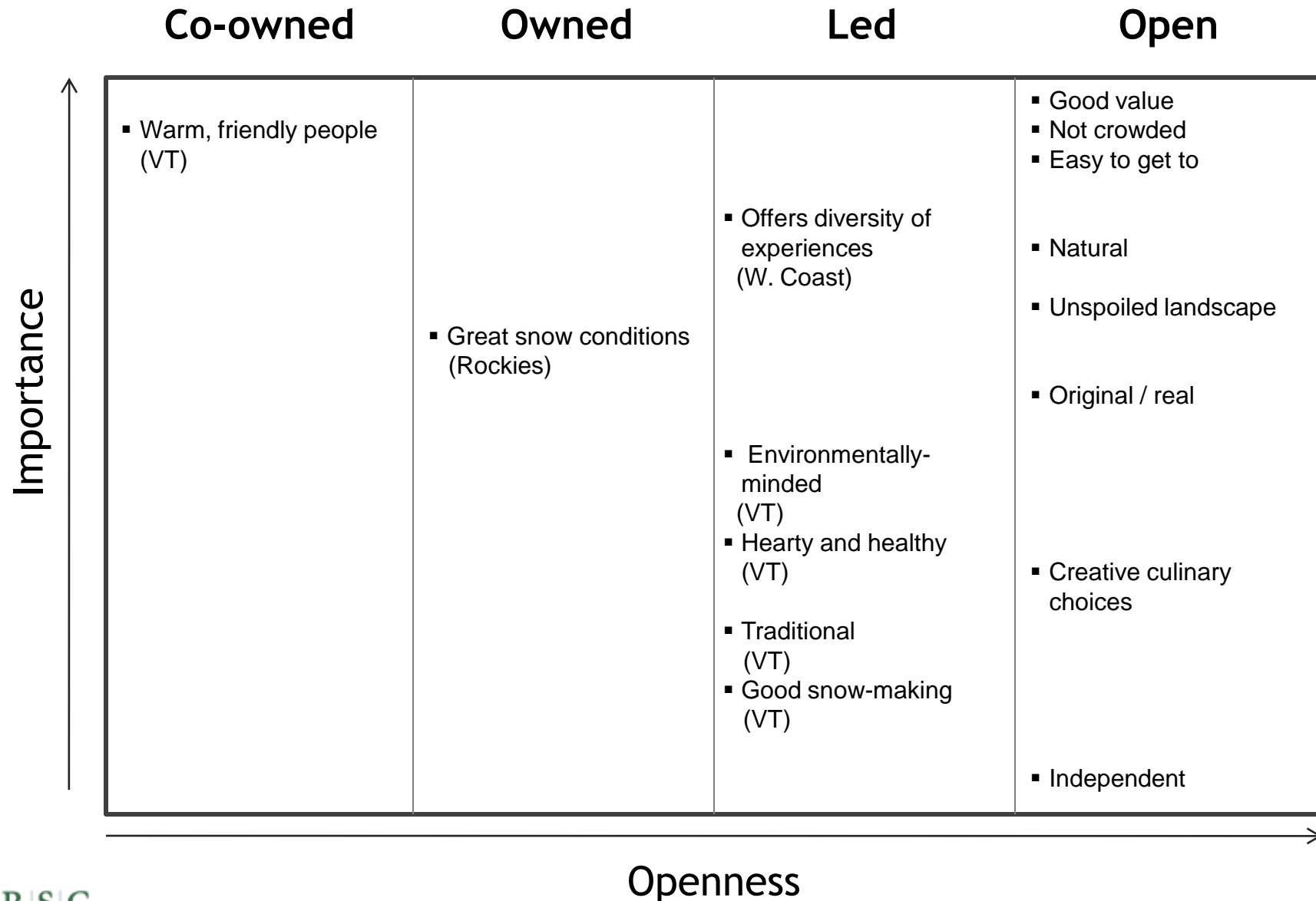
OpenSpace – Winter: VT Resident



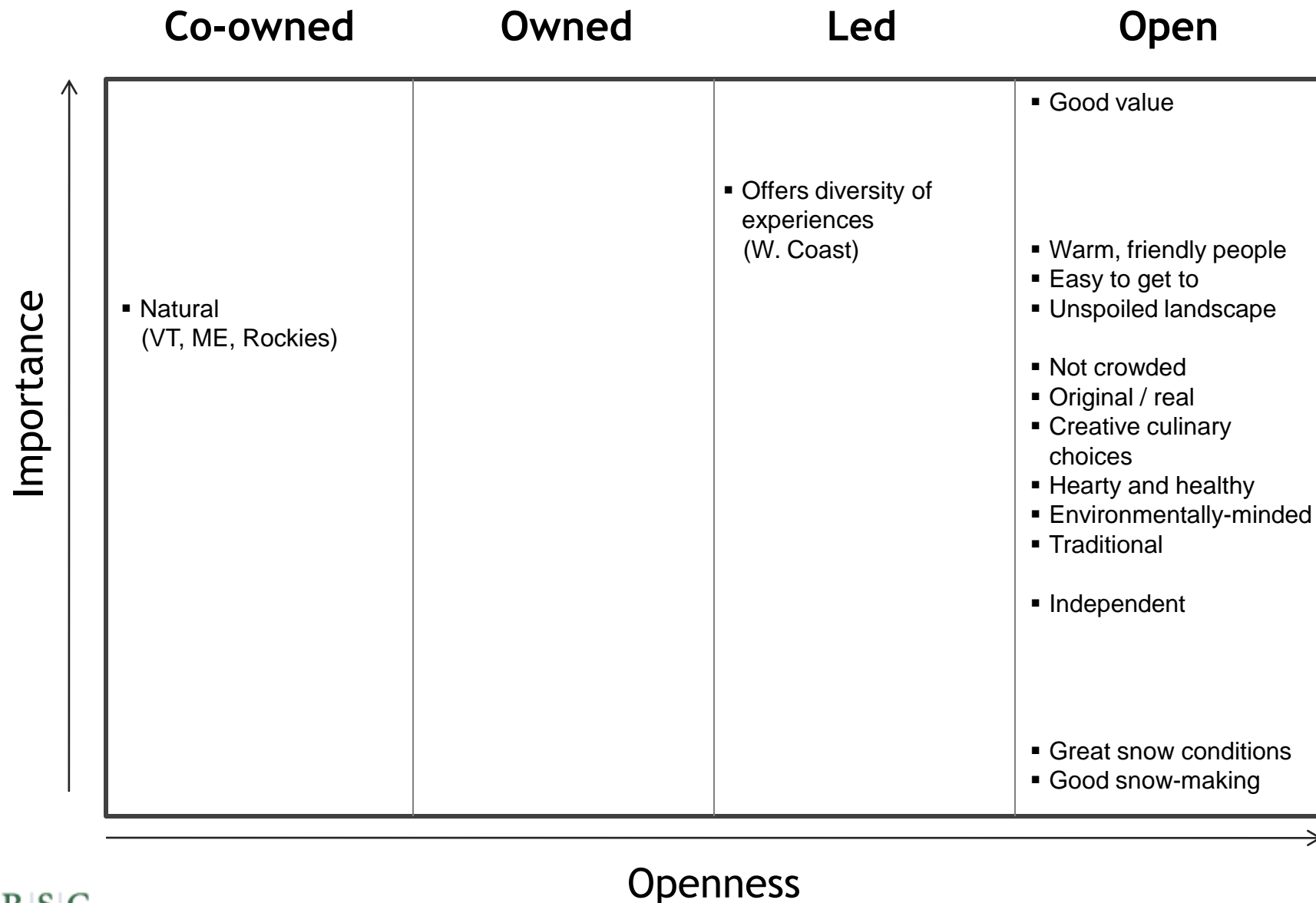
OpenSpace – Winter: VT Provider



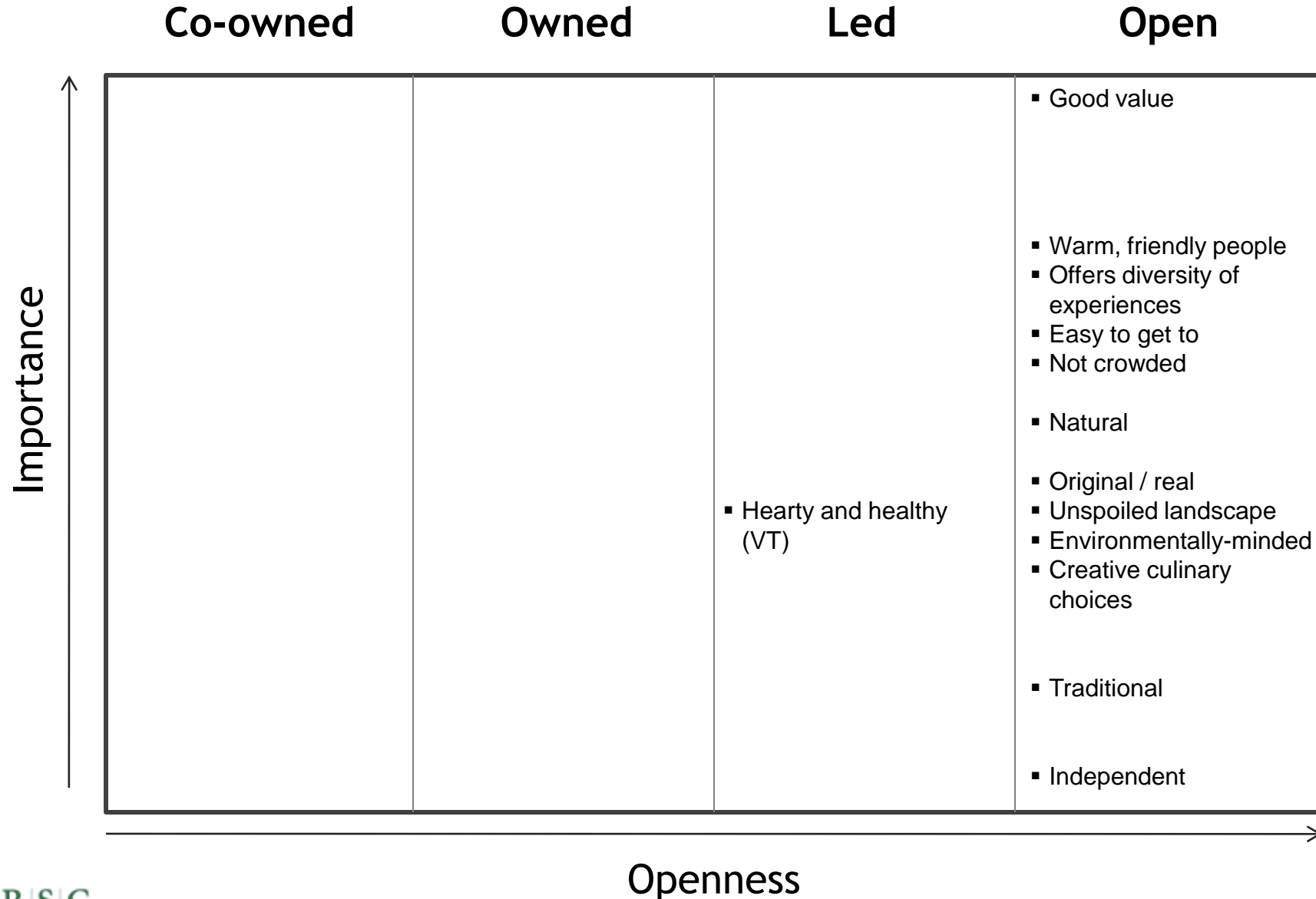
OpenSpace – Winter: VT Vacation



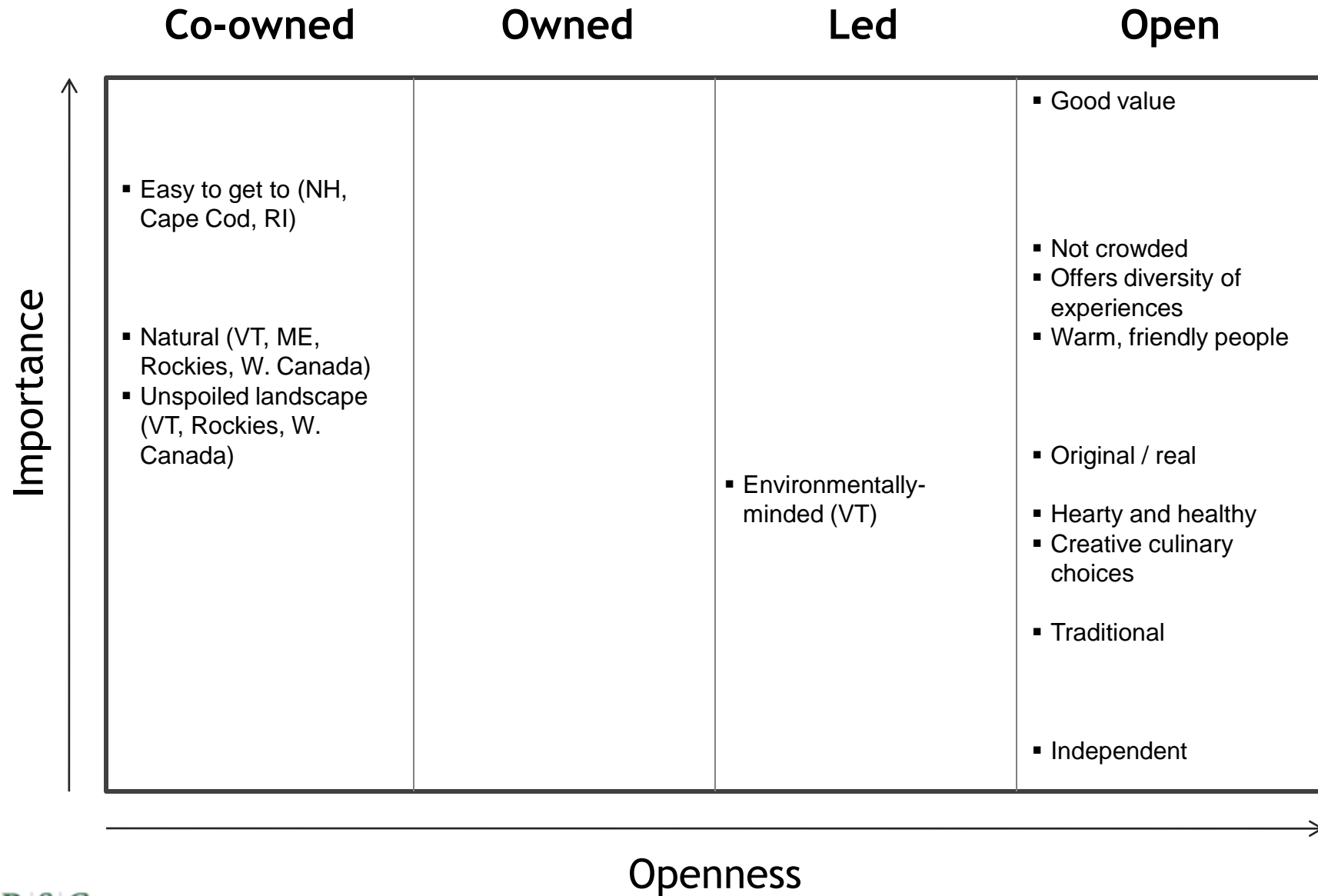
OpenSpace – Winter: Non-VT Vacation



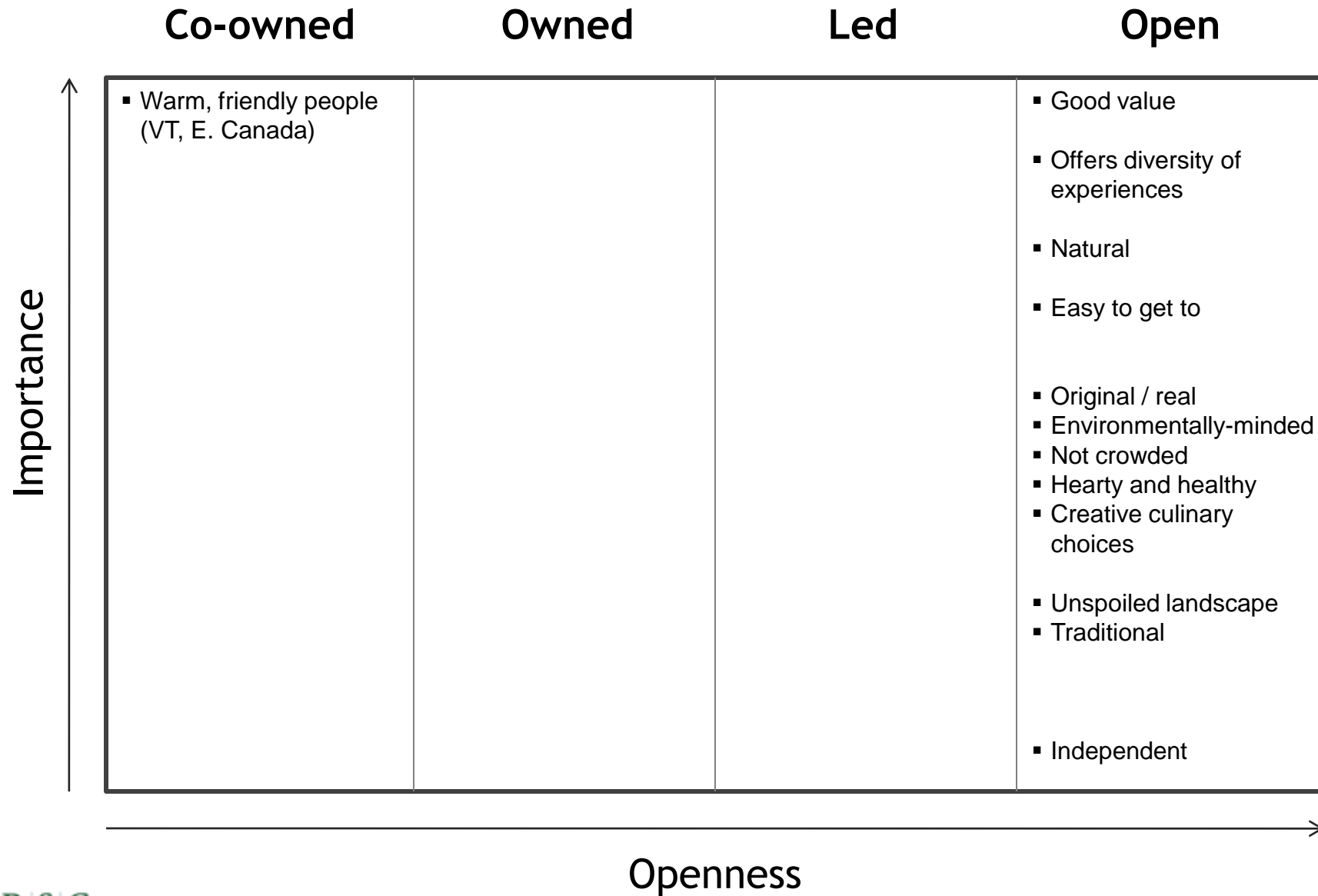
OpenSpace – Summer: NYC



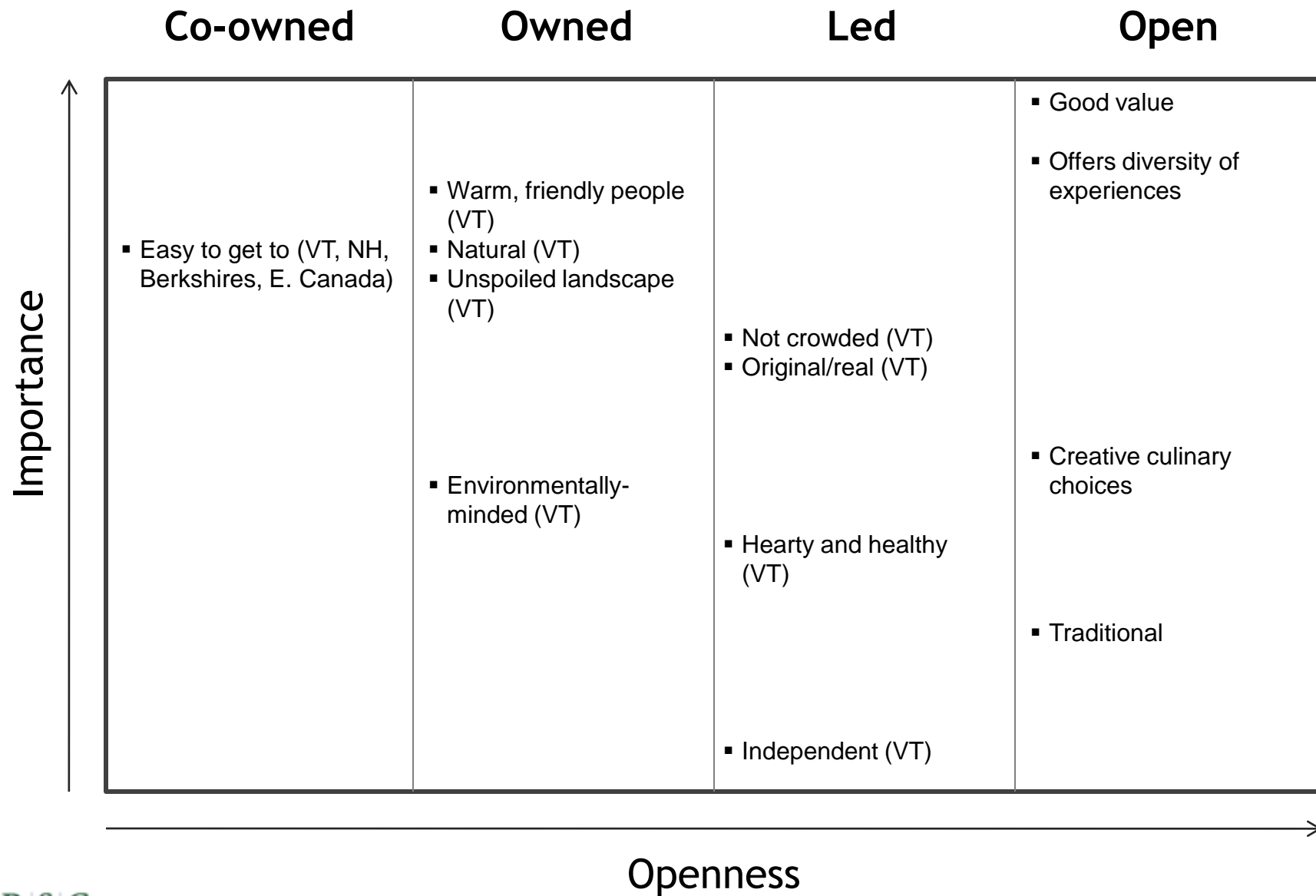
OpenSpace – Summer: MA



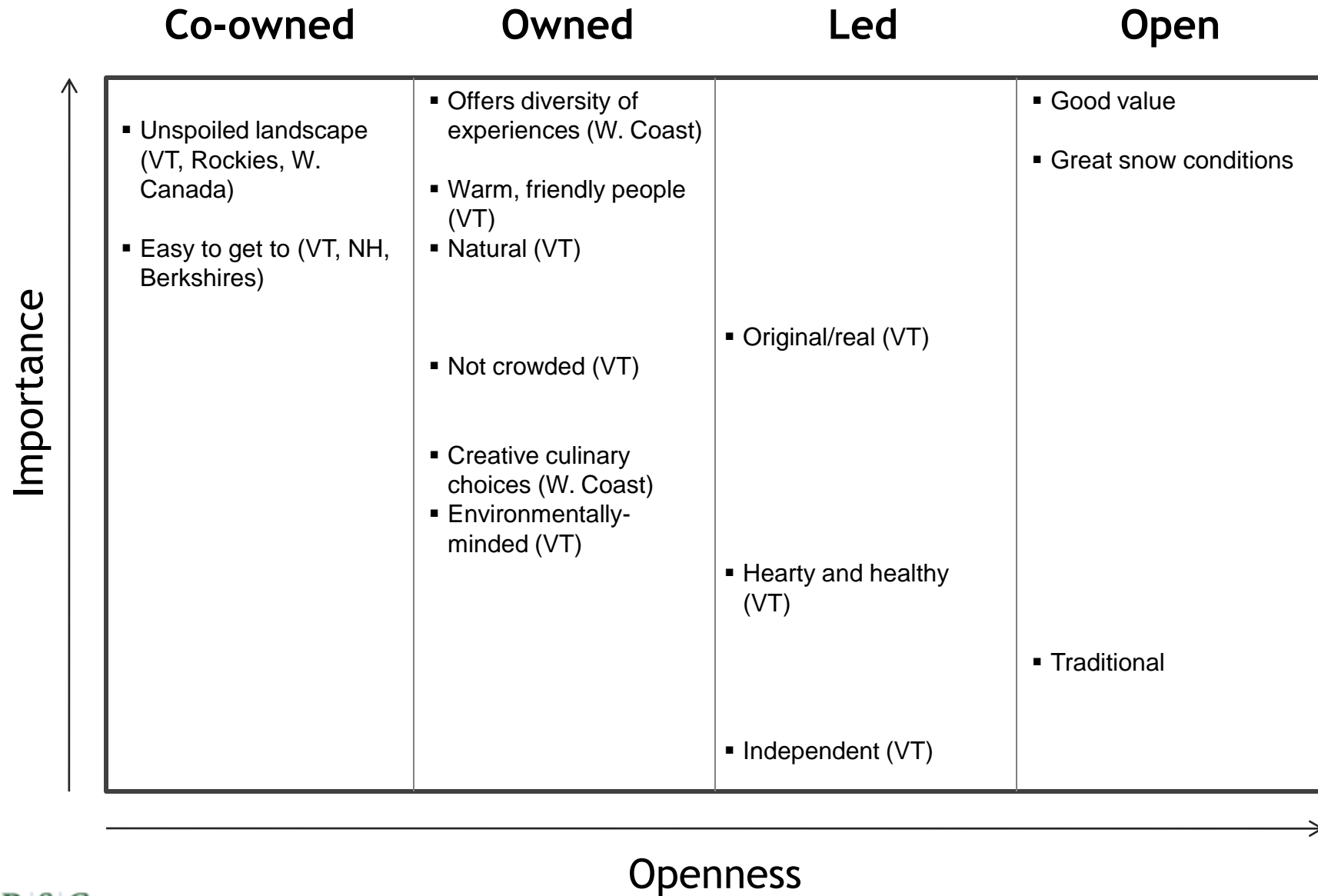
OpenSpace – Summer: CAN



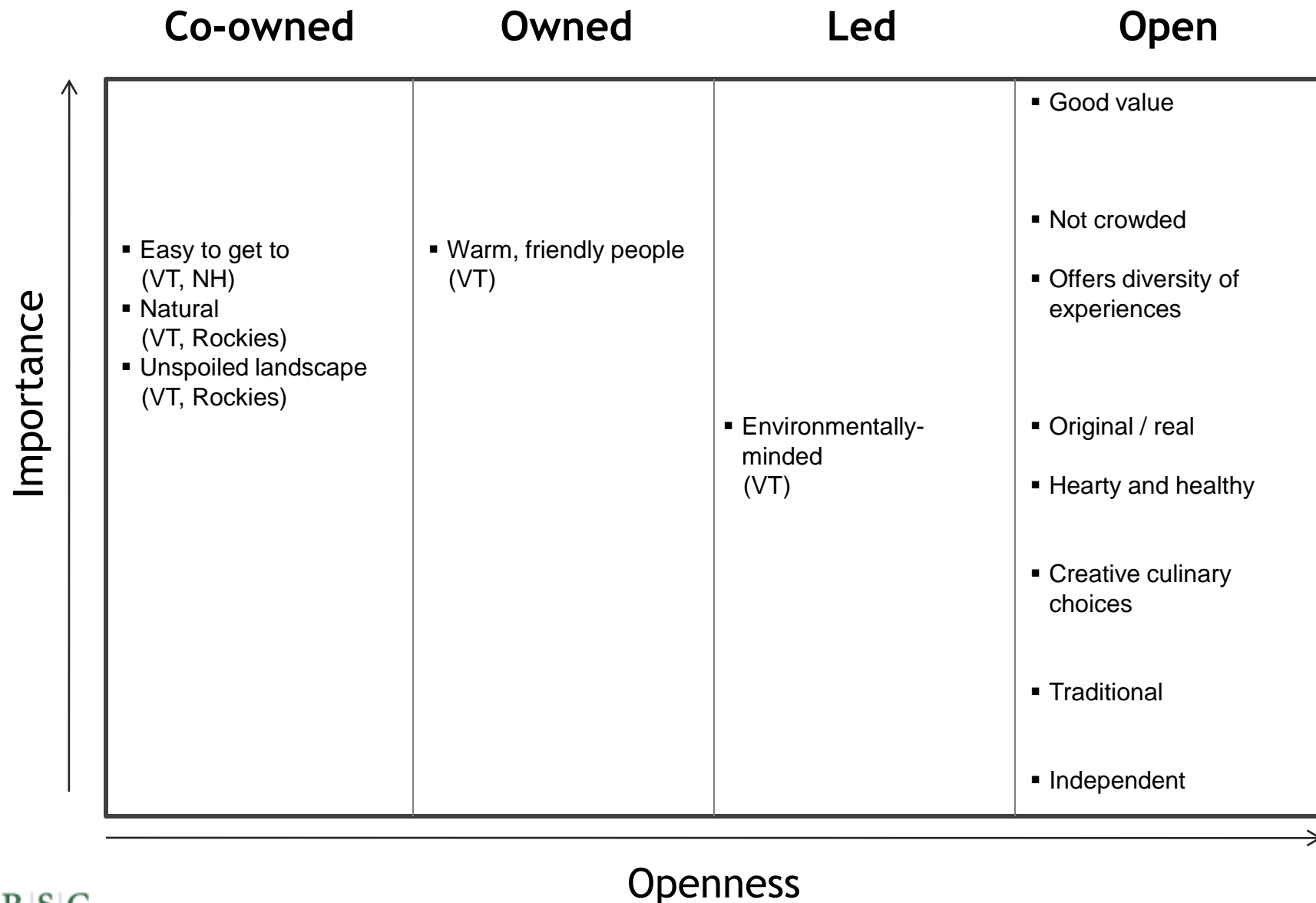
OpenSpace – Summer: VT Resident



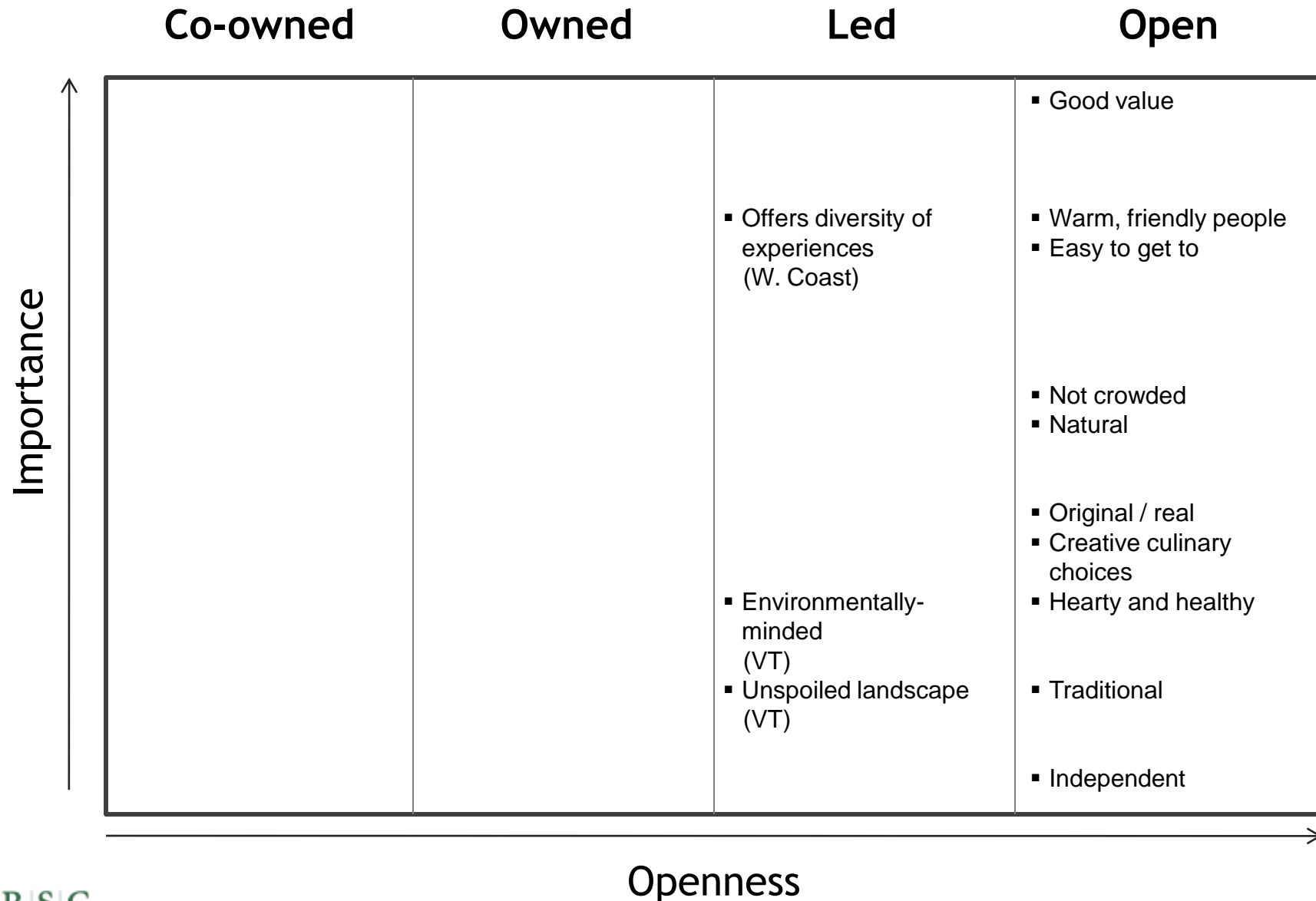
OpenSpace – Summer: VT Provider



OpenSpace – Summer: VT Vacationer



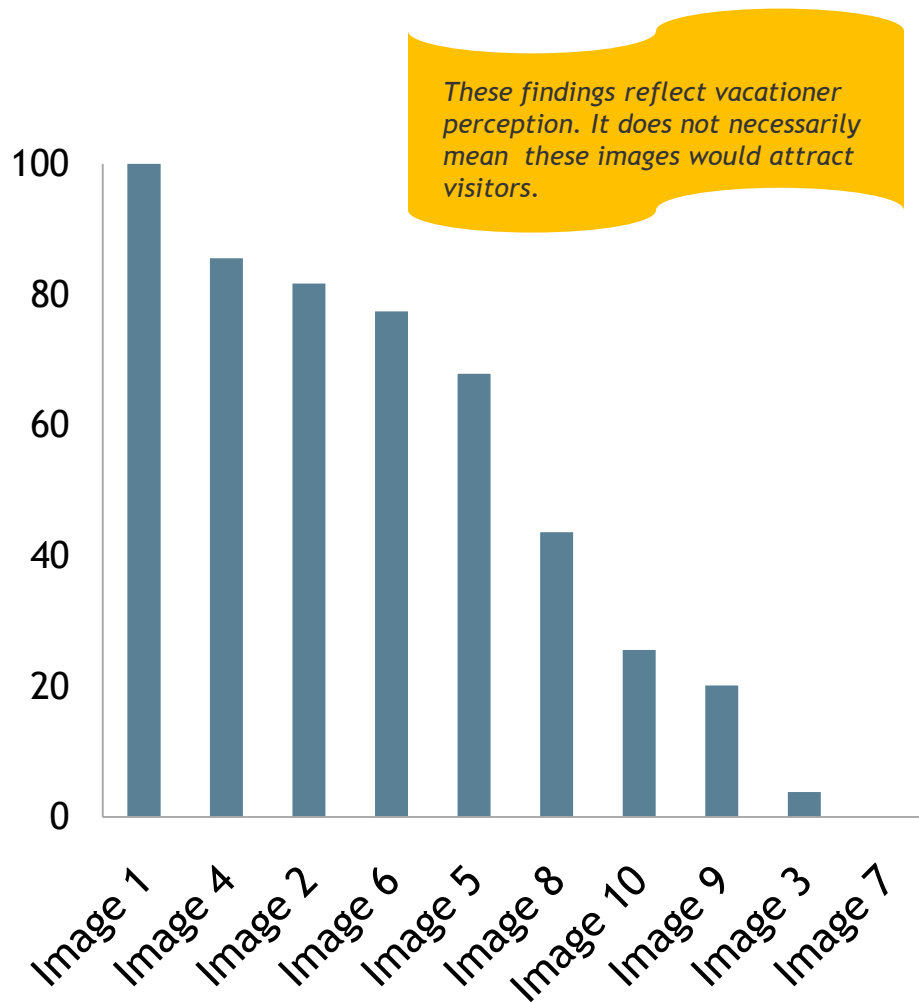
OpenSpace – Summer: Non-VT Vacationer



Appendix

- Respondent Profiles
- Vacation Profiles
- Attribute Importance
- Open Space
- **Image Relevance**
- Word/Phrase Relevance
- Other

Image Relevance – Winter: NYC



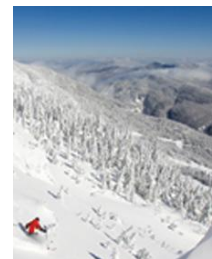
Img 1



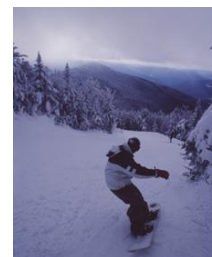
Img 2



Img 3



Img 4



Img 5



Img 6



Img 7



Img 8

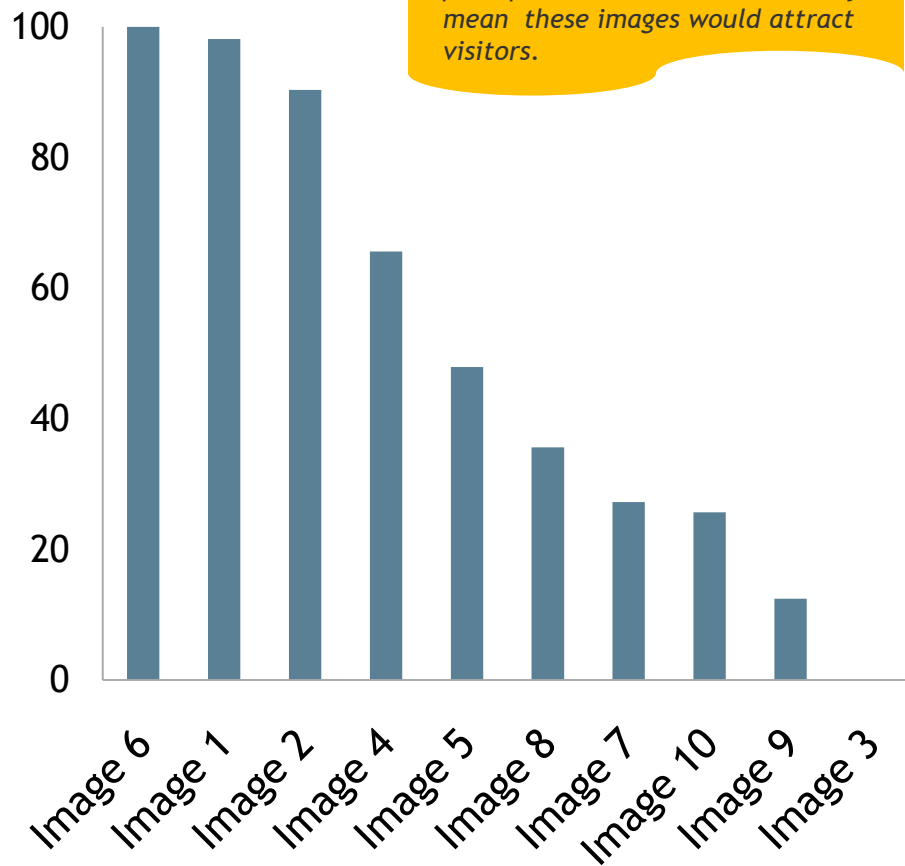


Img 9



Img 10

Image Relevance – Winter: MA



Img 1



Img 6



Img 2



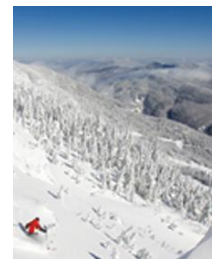
Img 7



Img 3



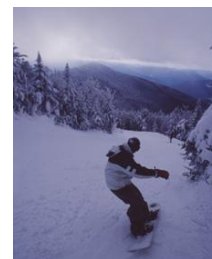
Img 8



Img 4



Img 9

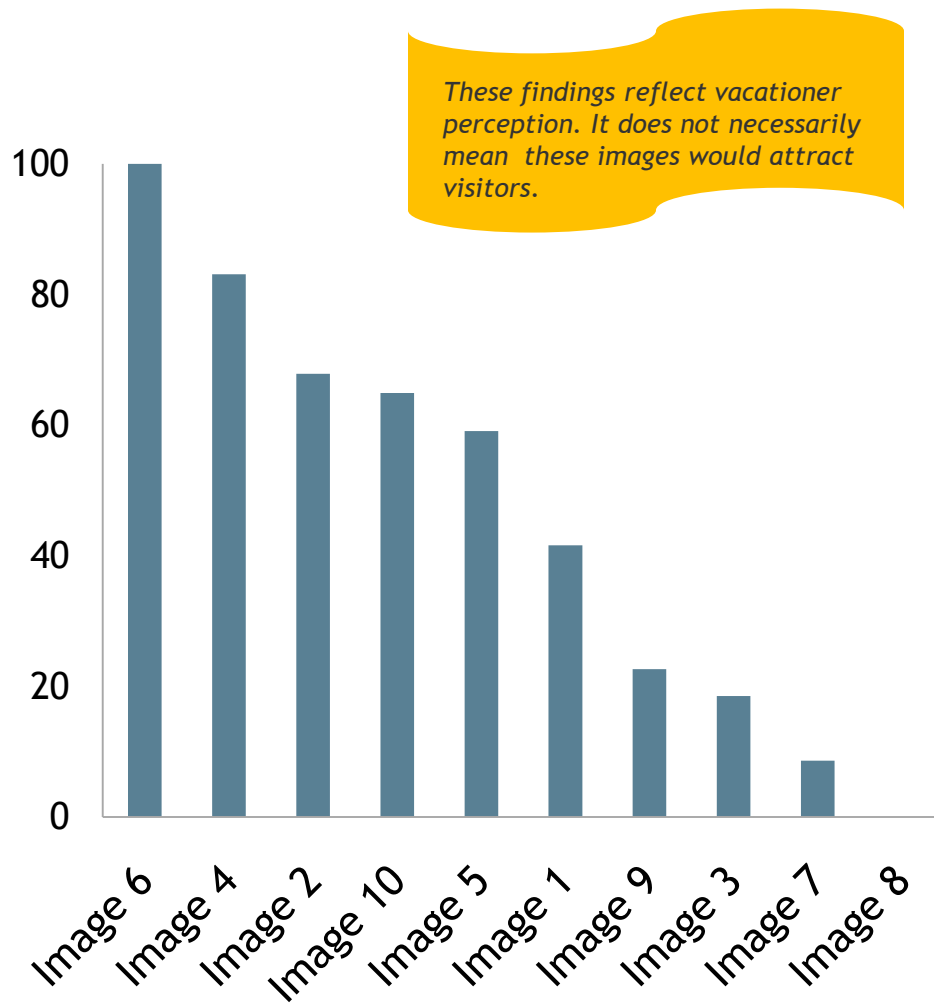


Img 5



Img 10

Image Relevance – Winter: CAN



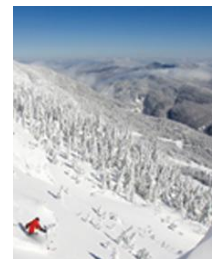
Img 1



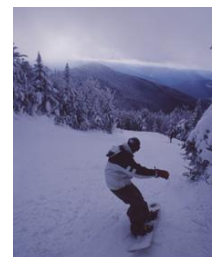
Img 2



Img 3



Img 4



Img 5



Img 6



Img 7



Img 8

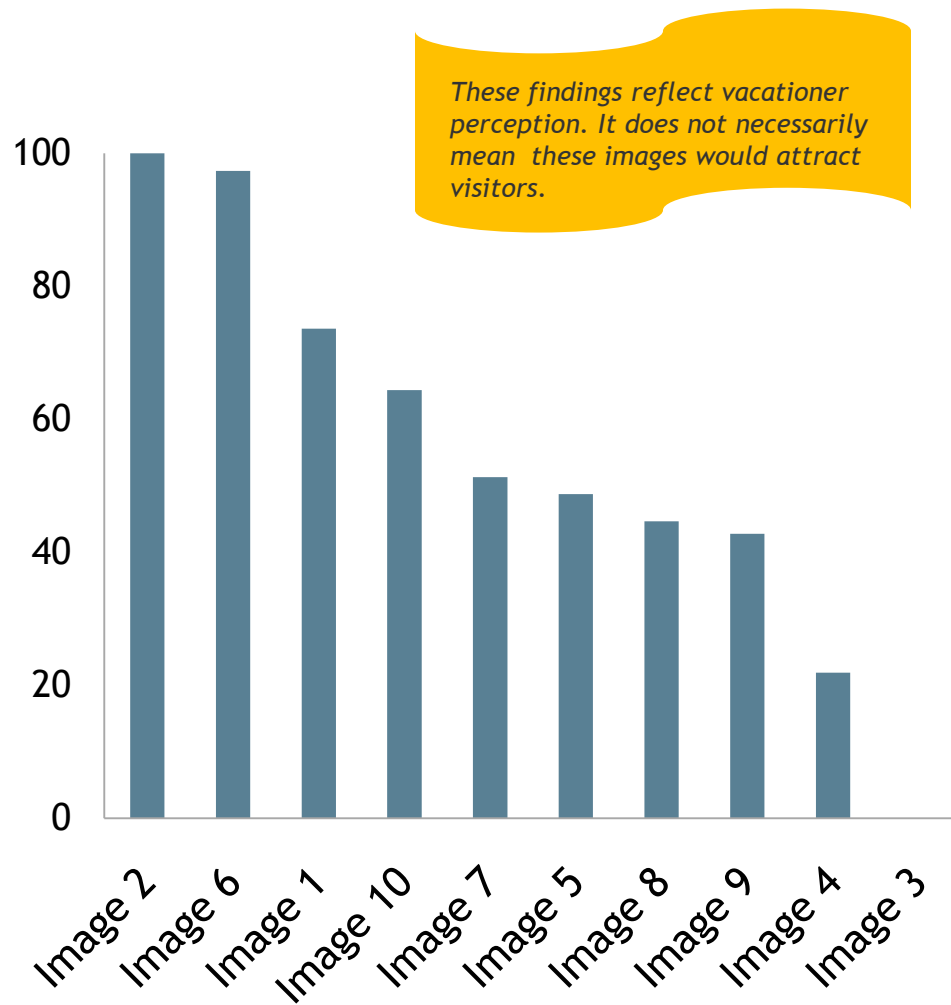


Img 9



Img 10

Image Relevance – Winter: VT Resident



Img 1



Img 6



Img 2



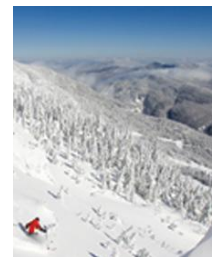
Img 7



Img 3



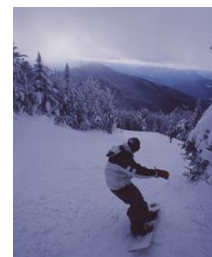
Img 8



Img 4



Img 9

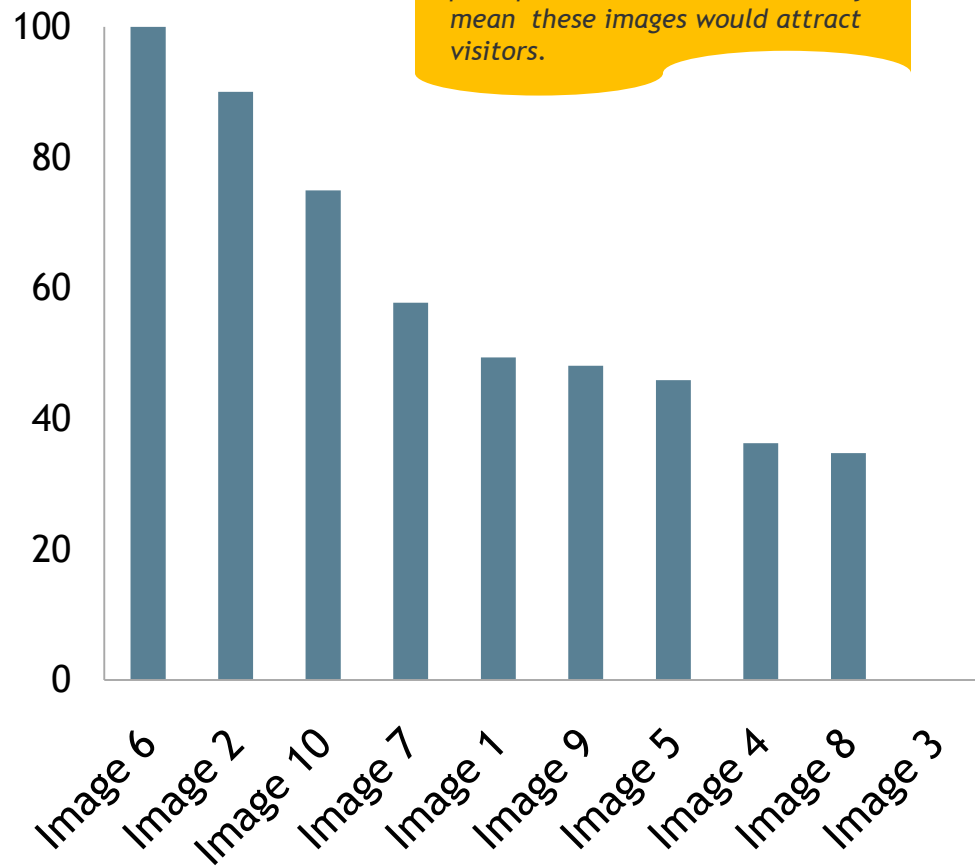


Img 5



Img 10

Image Relevance – Winter: VT Provider



Img 1



Img 6



Img 2



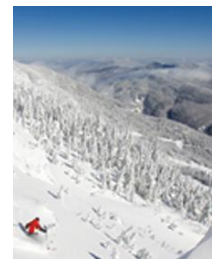
Img 7



Img 3



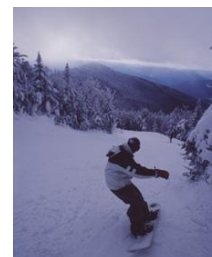
Img 8



Img 4



Img 9

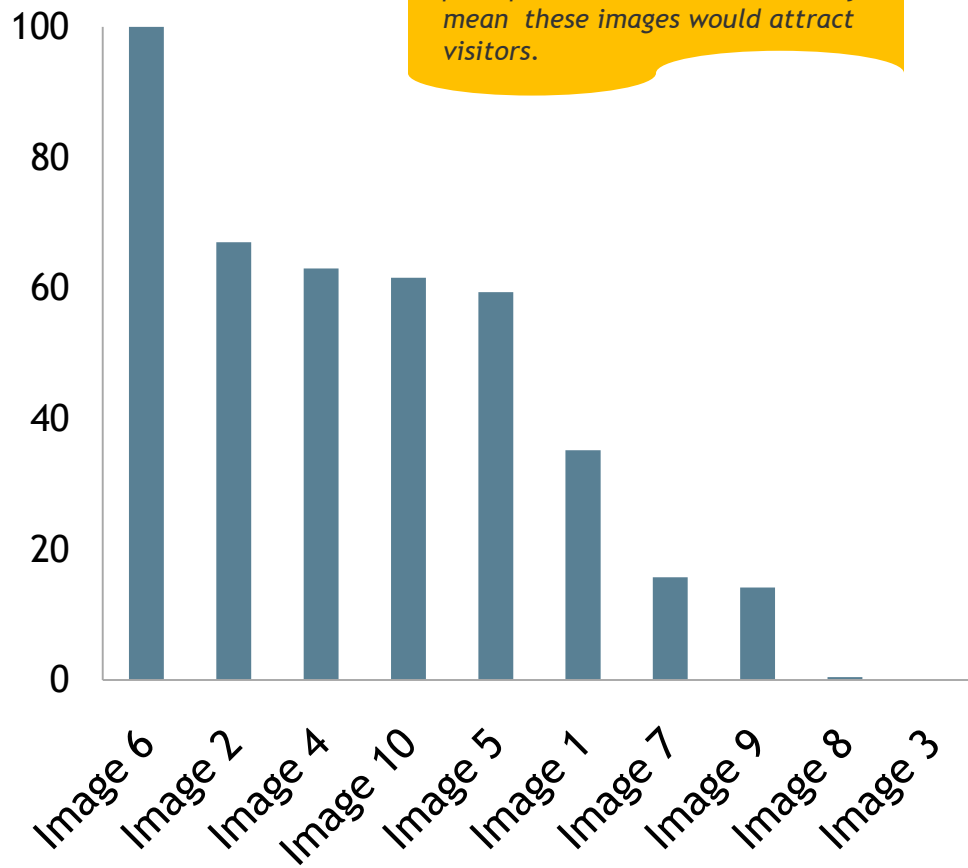


Img 5



Img 10

Image Relevance – Winter: VT Vacation



These findings reflect vacationer perception. It does not necessarily mean these images would attract visitors.



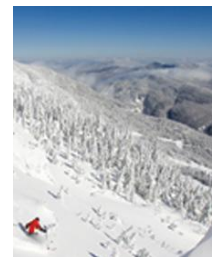
Img 1



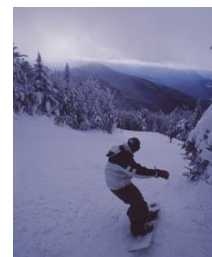
Img 2



Img 3



Img 4



Img 5



Img 6



Img 7



Img 8

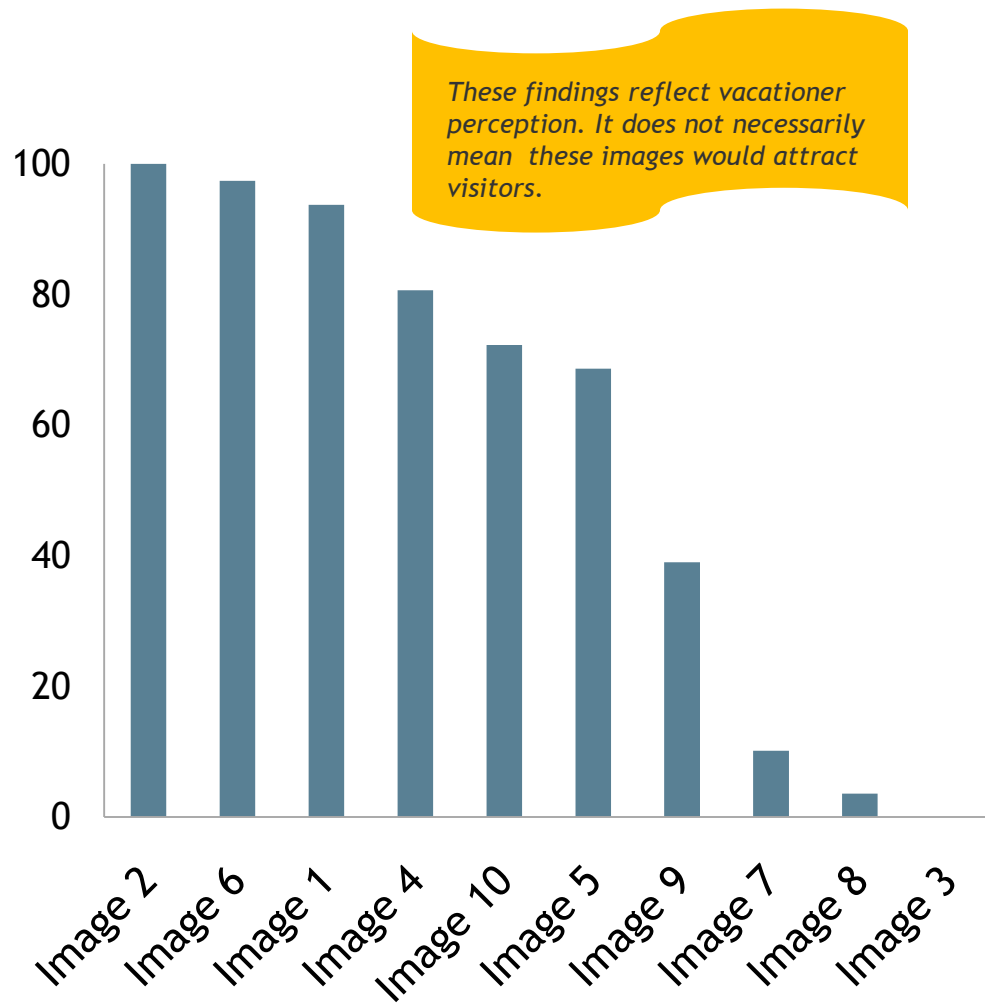


Img 9



Img 10

Image Relevance – Winter: Non-VT Vacation



Img 1



Img 6



Img 2



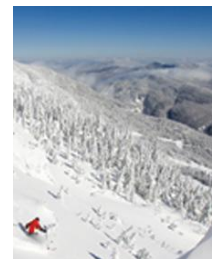
Img 7



Img 3



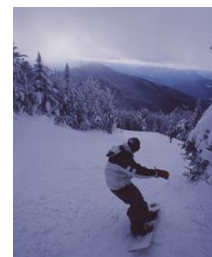
Img 8



Img 4



Img 9

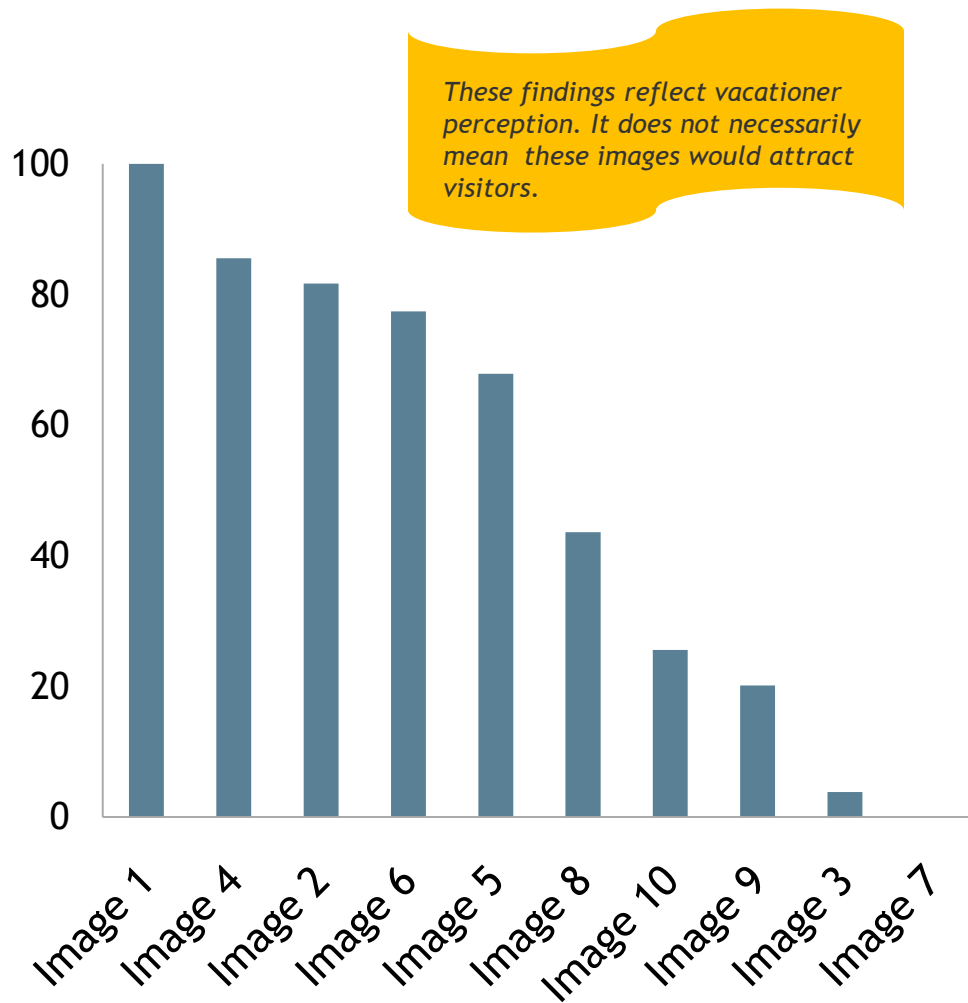


Img 5



Img 10

Image Relevance – Summer: NYC



Img 1



Img 6



Img 2



Img 7



Img 3



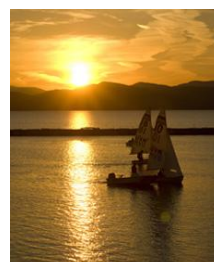
Img 8



Img 4



Img 9

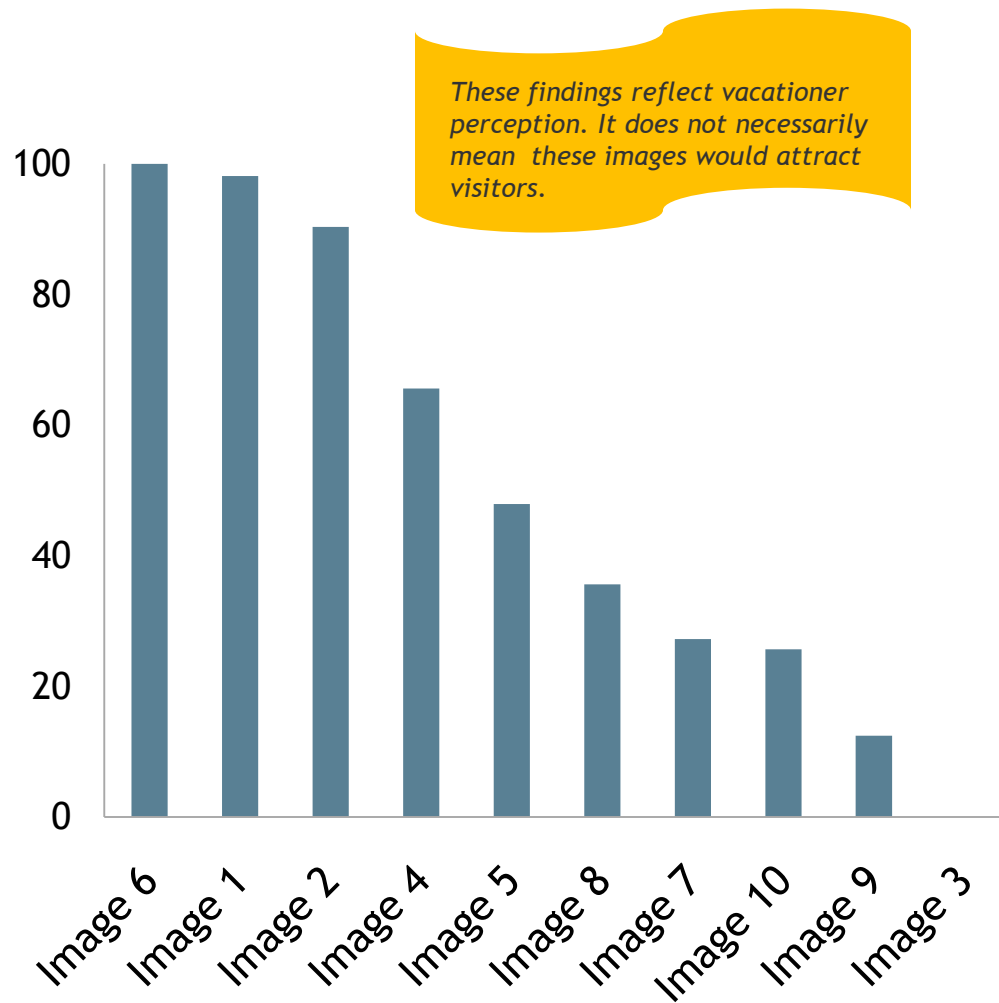


Img 5



Img 10

Image Relevance – Summer: MA



Img 1



Img 6



Img 2



Img 7



Img 3



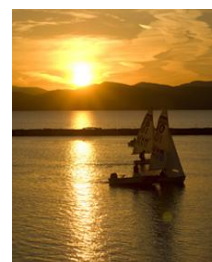
Img 8



Img 4



Img 9

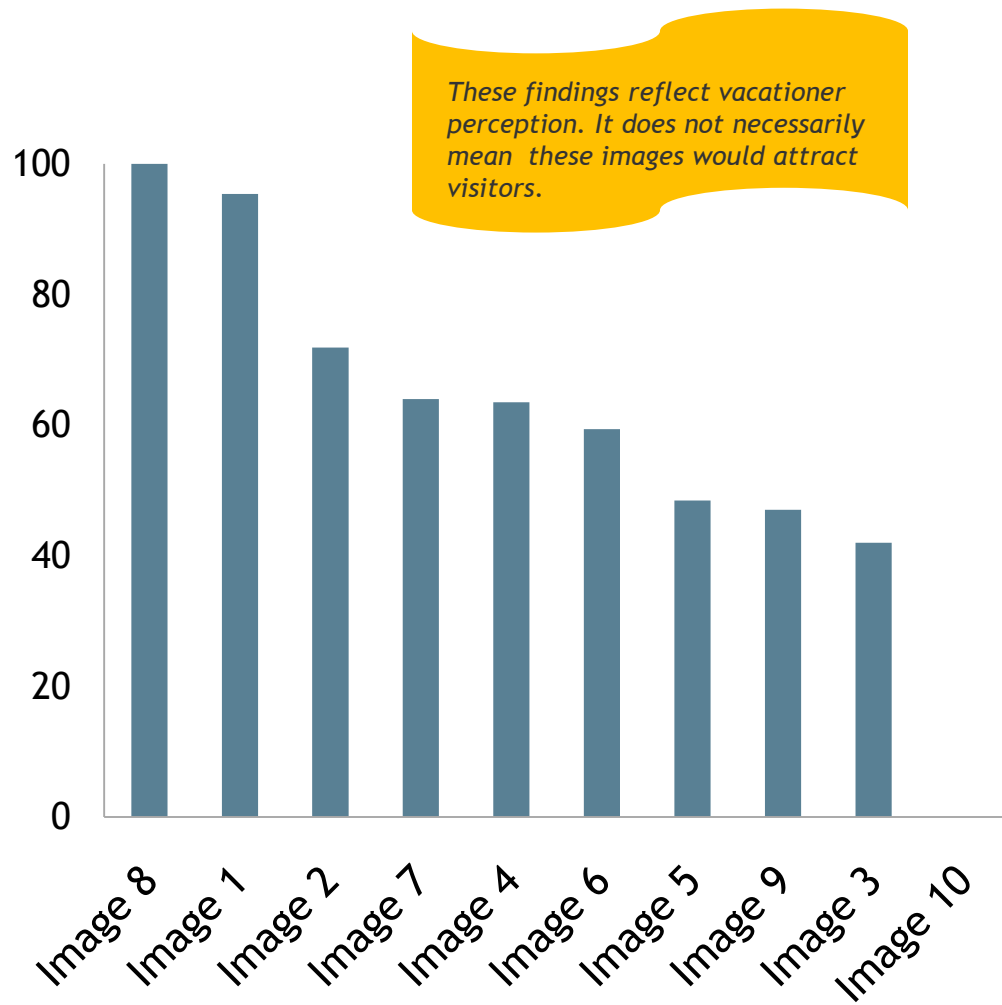


Img 5



Img 10

Image Relevance – Summer: CAN



Img 1



Img 6



Img 2



Img 7



Img 3



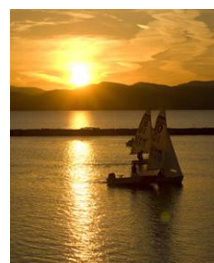
Img 8



Img 4



Img 9

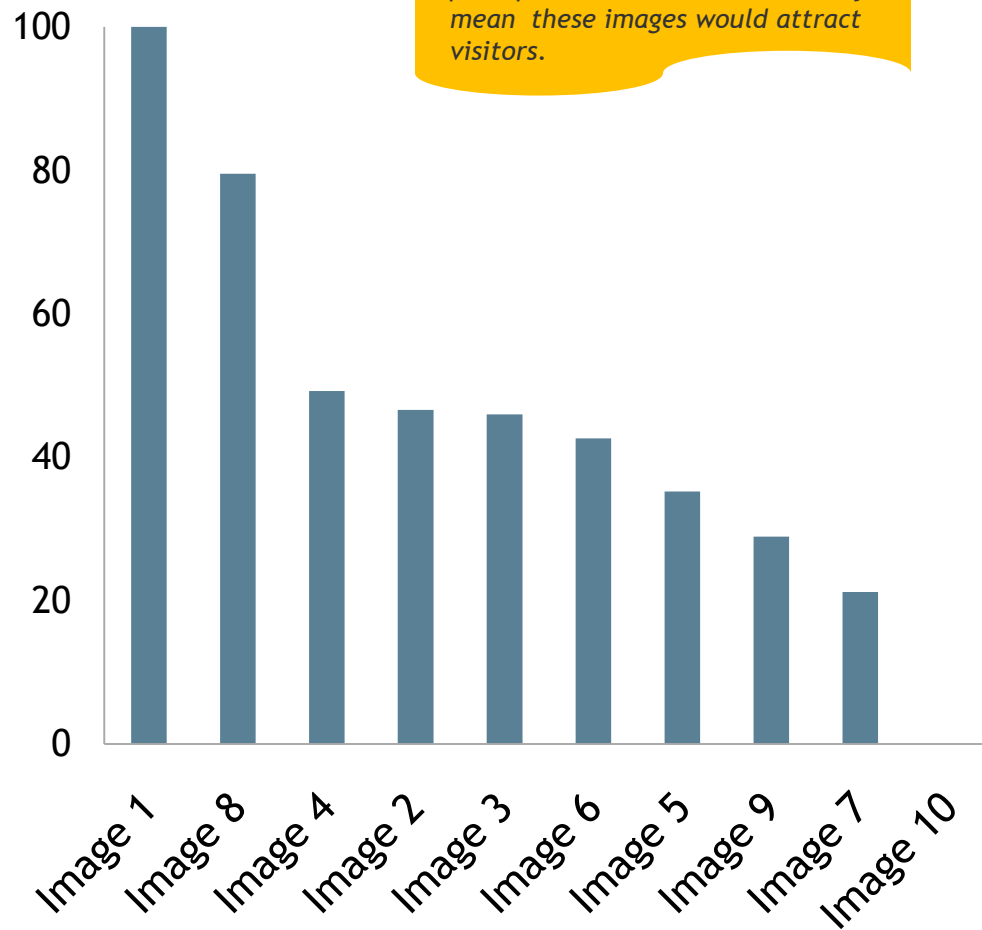


Img 5



Img 10

Image Relevance – Summer: VT Resident



These findings reflect vacationer perception. It does not necessarily mean these images would attract visitors.



Img 1



Img 6



Img 2



Img 7



Img 3



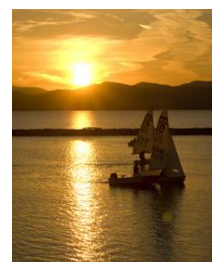
Img 8



Img 4



Img 9

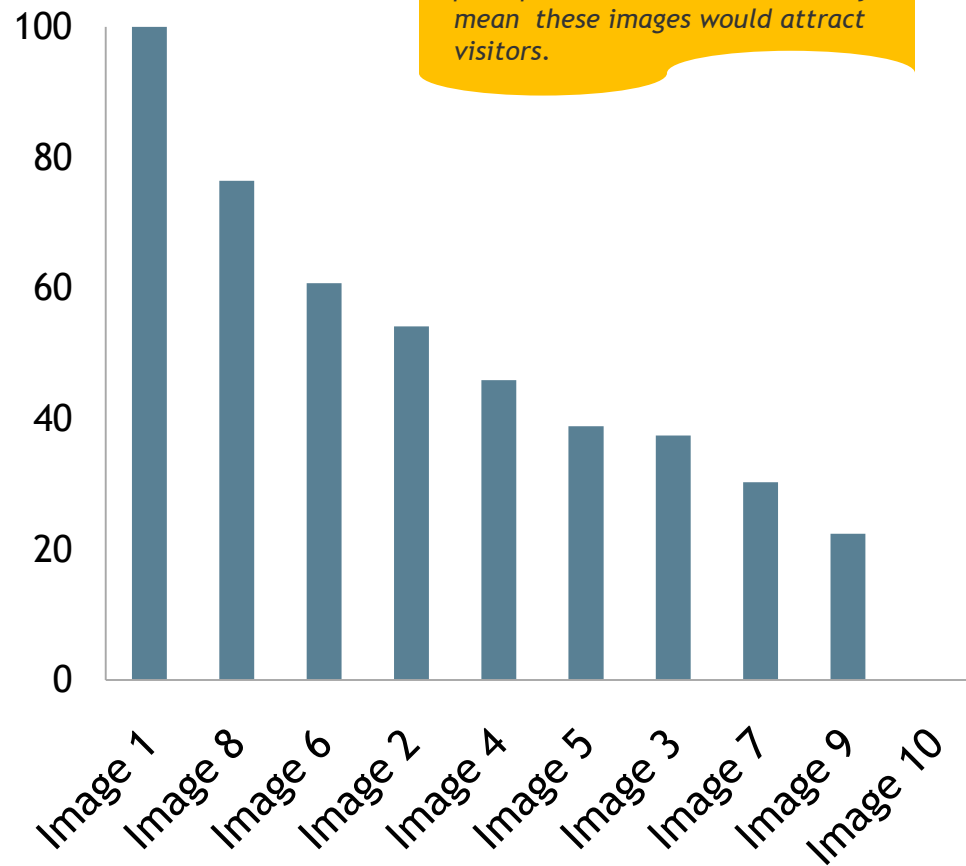


Img 5



Img 10

Image Relevance – Summer: VT Provider



Img 1



Img 6



Img 2



Img 7



Img 3



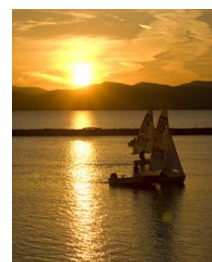
Img 8



Img 4



Img 9

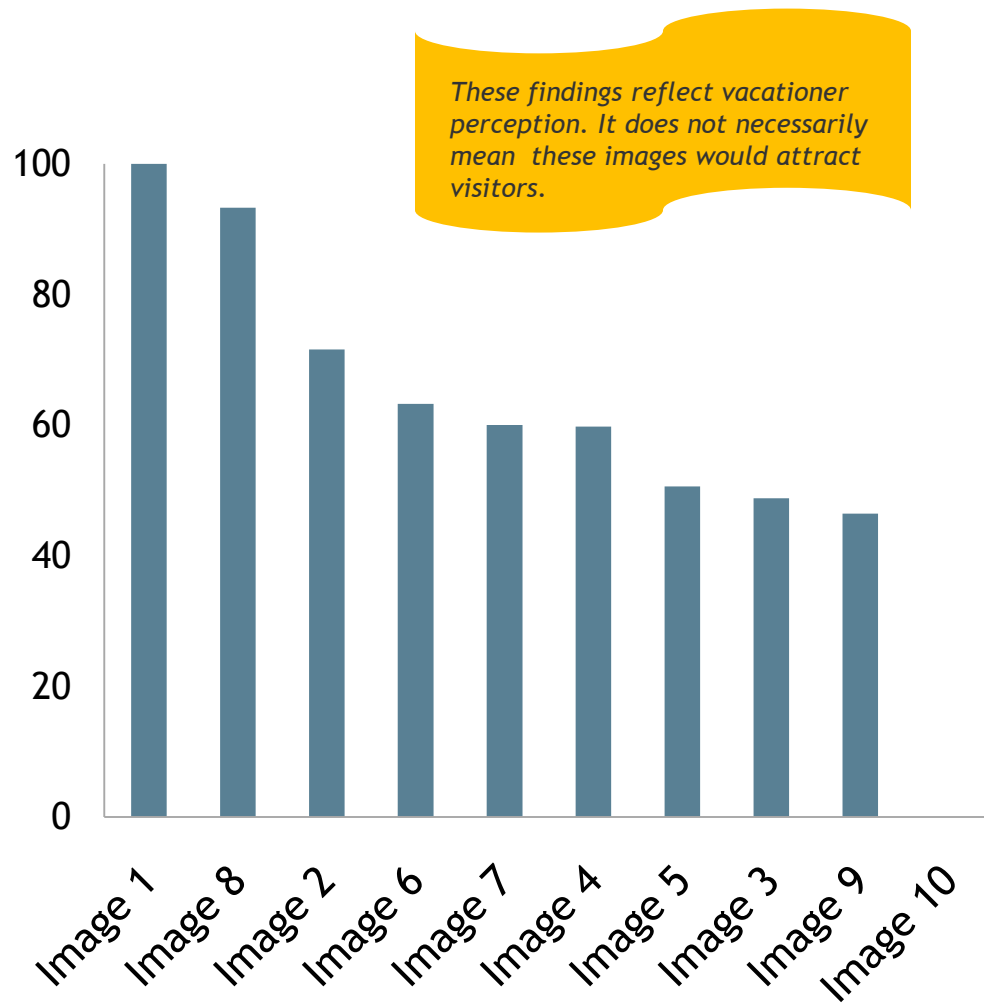


Img 5



Img 10

Image Relevance – Summer: VT Vacation



Img 1



Img 6



Img 2



Img 7



Img 3



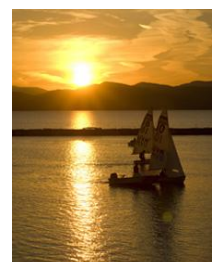
Img 8



Img 4



Img 9

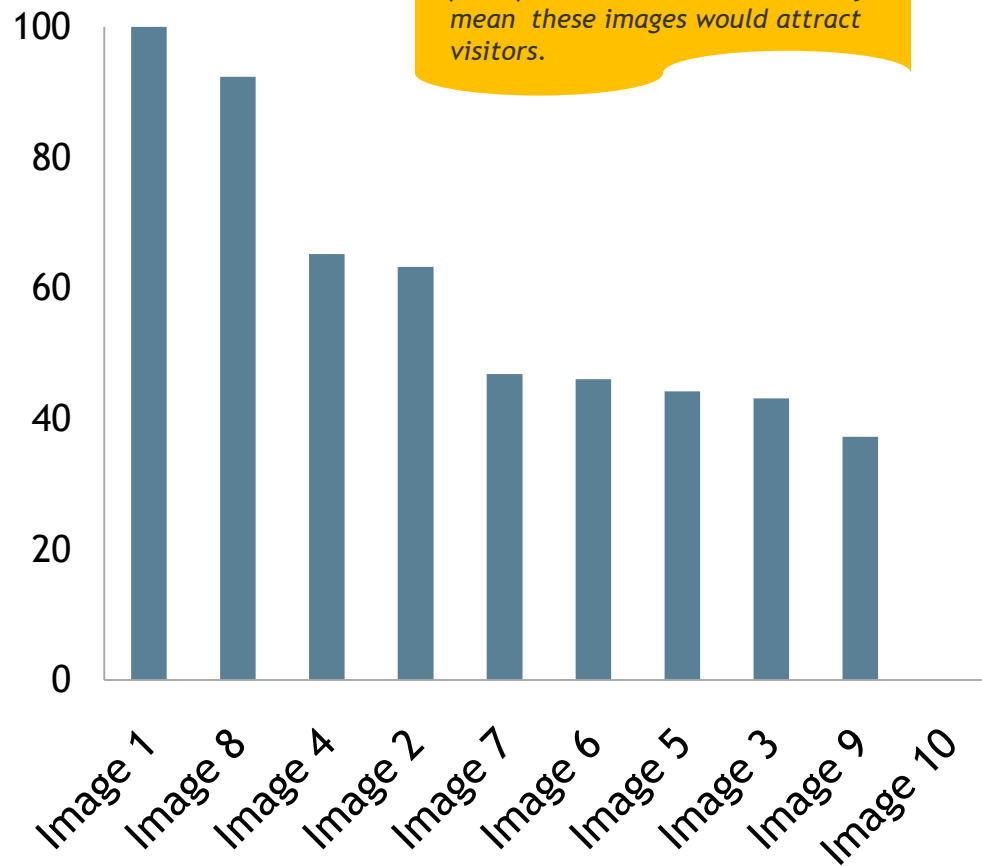


Img 5



Img 10

Image Relevance – Summer: Non-VT Vacation



These findings reflect vacationer perception. It does not necessarily mean these images would attract visitors.



Img 1



Img 6



Img 2



Img 7



Img 3



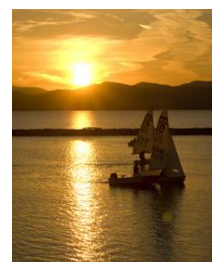
Img 8



Img 4



Img 9



Img 5

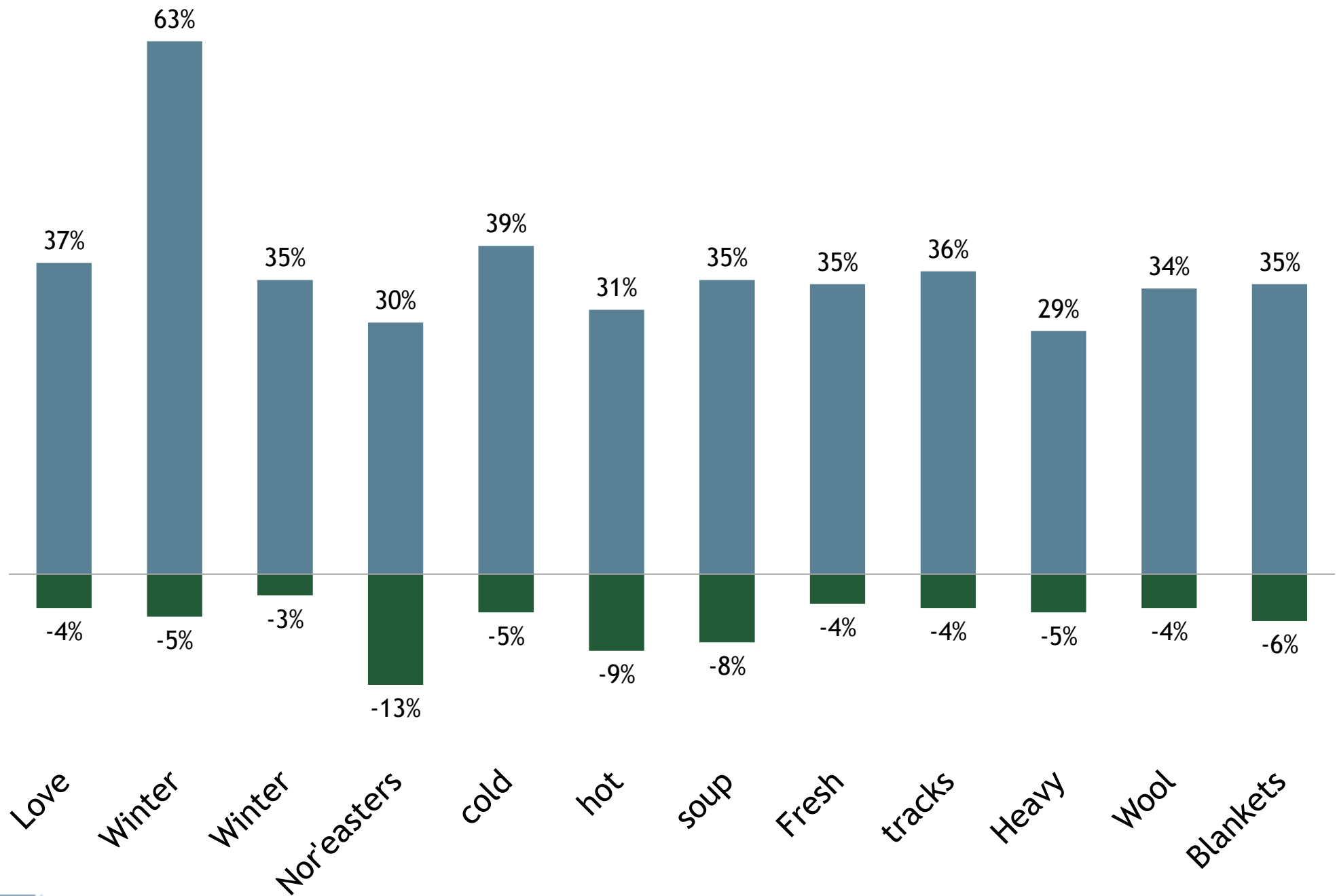


Img 10

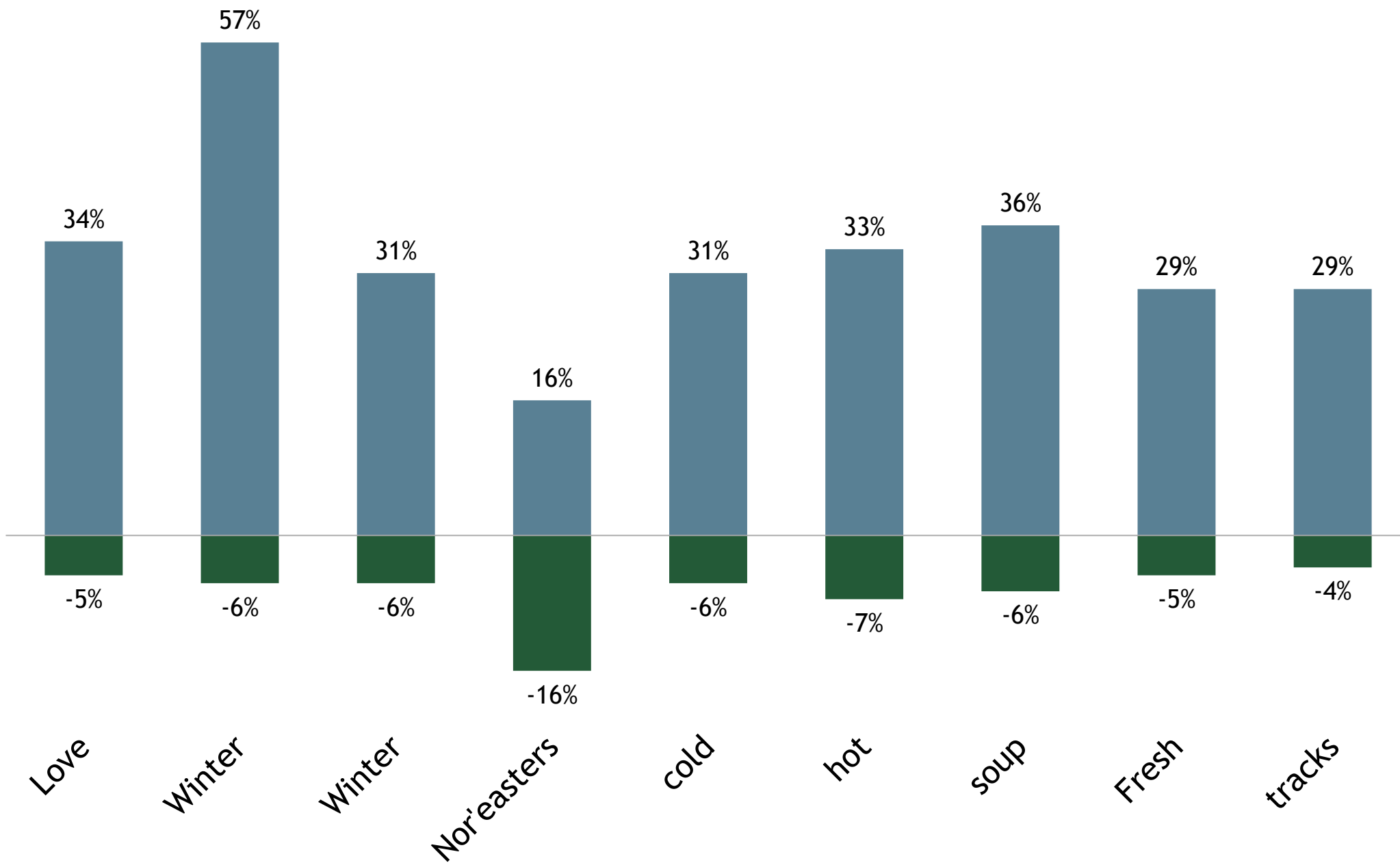
Appendix

- Respondent Profiles
- Vacation Profiles
- Attribute Importance
- Open Space
- Image Relevance
- **Word/Phrase Relevance**
- Other

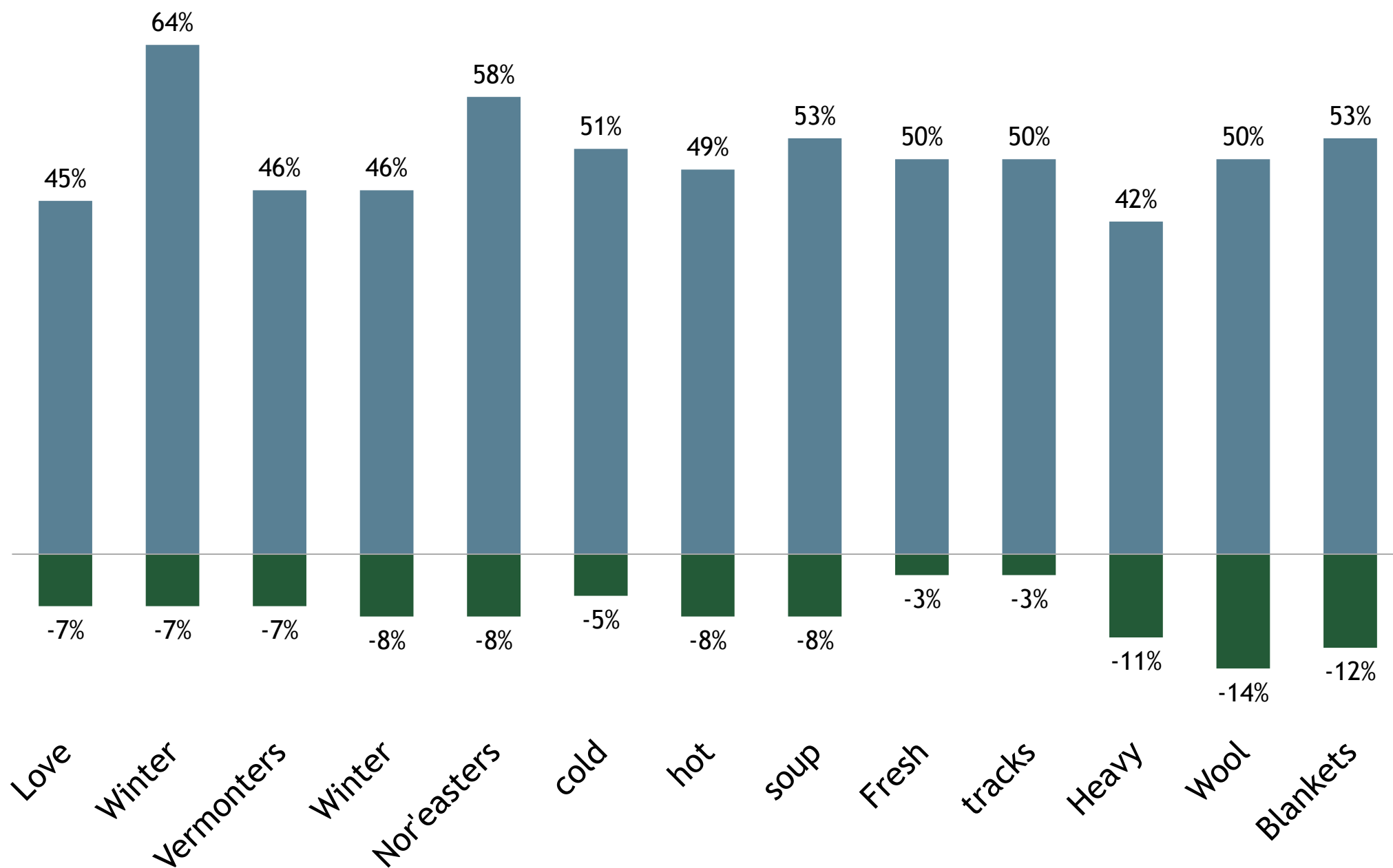
Phrase Relevance – Winter Manifesto 1: NYC



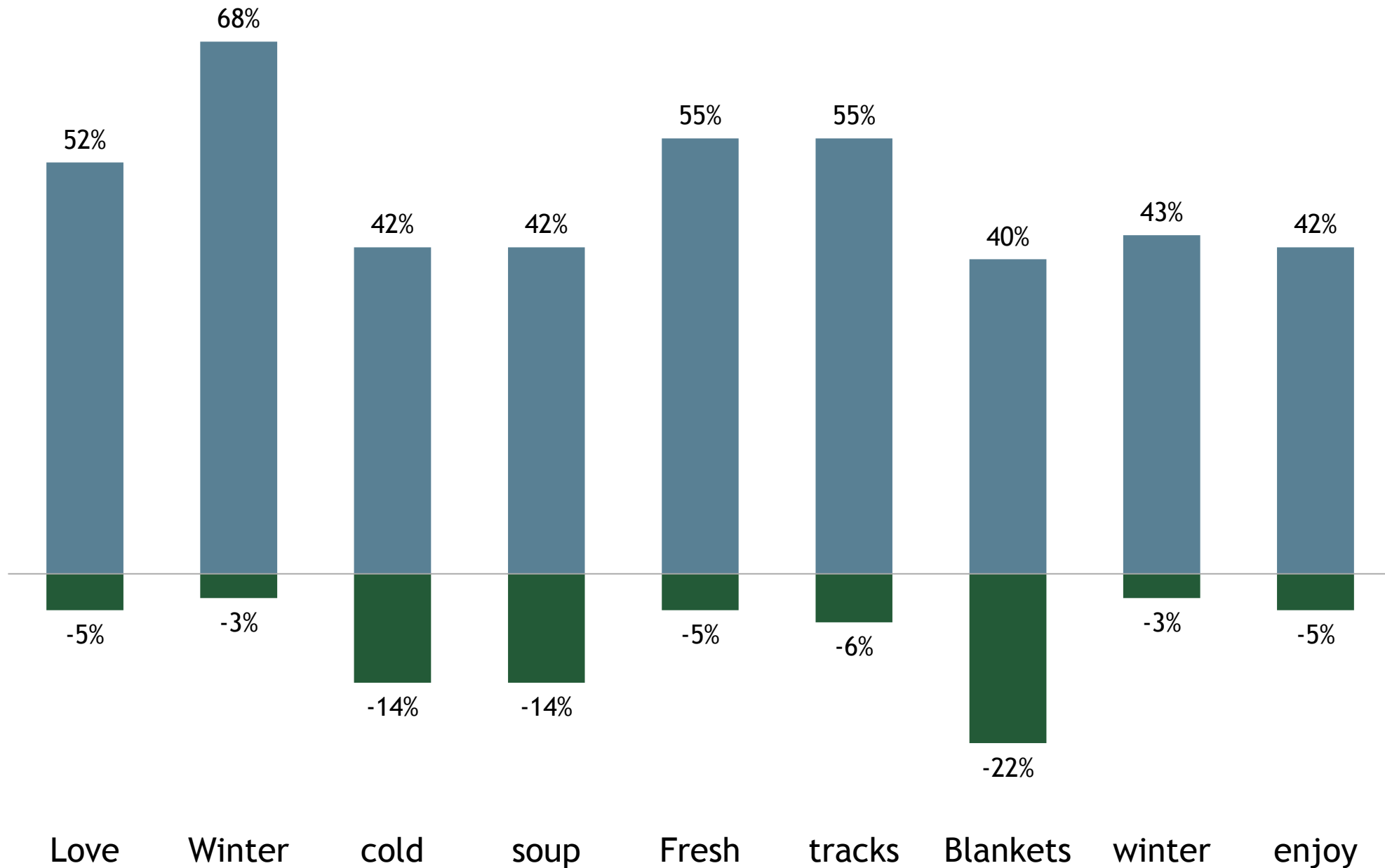
Phrase Relevance – Winter Manifesto 1: CAN



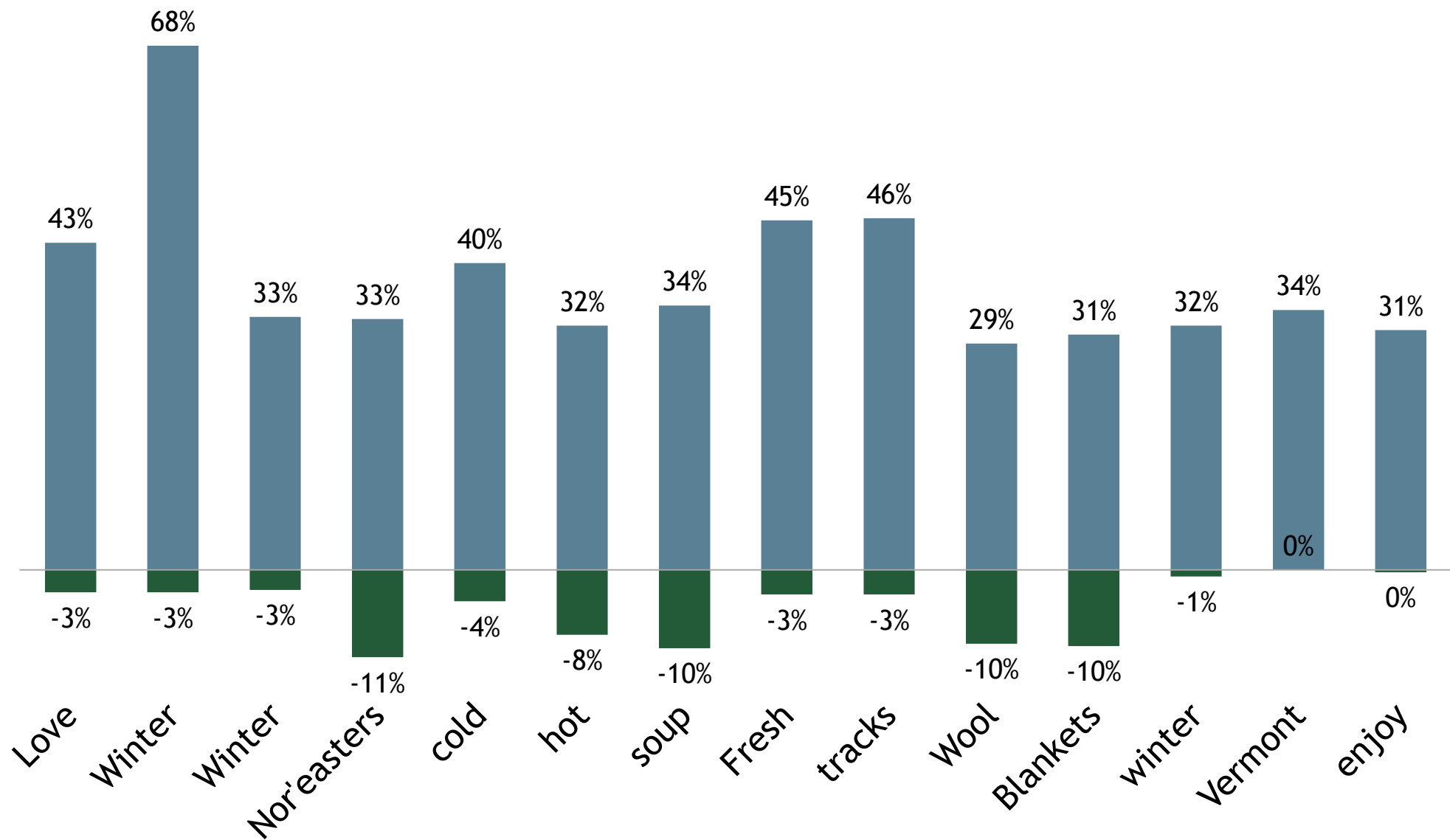
Phrase Relevance – Winter Manifesto 1: Resident



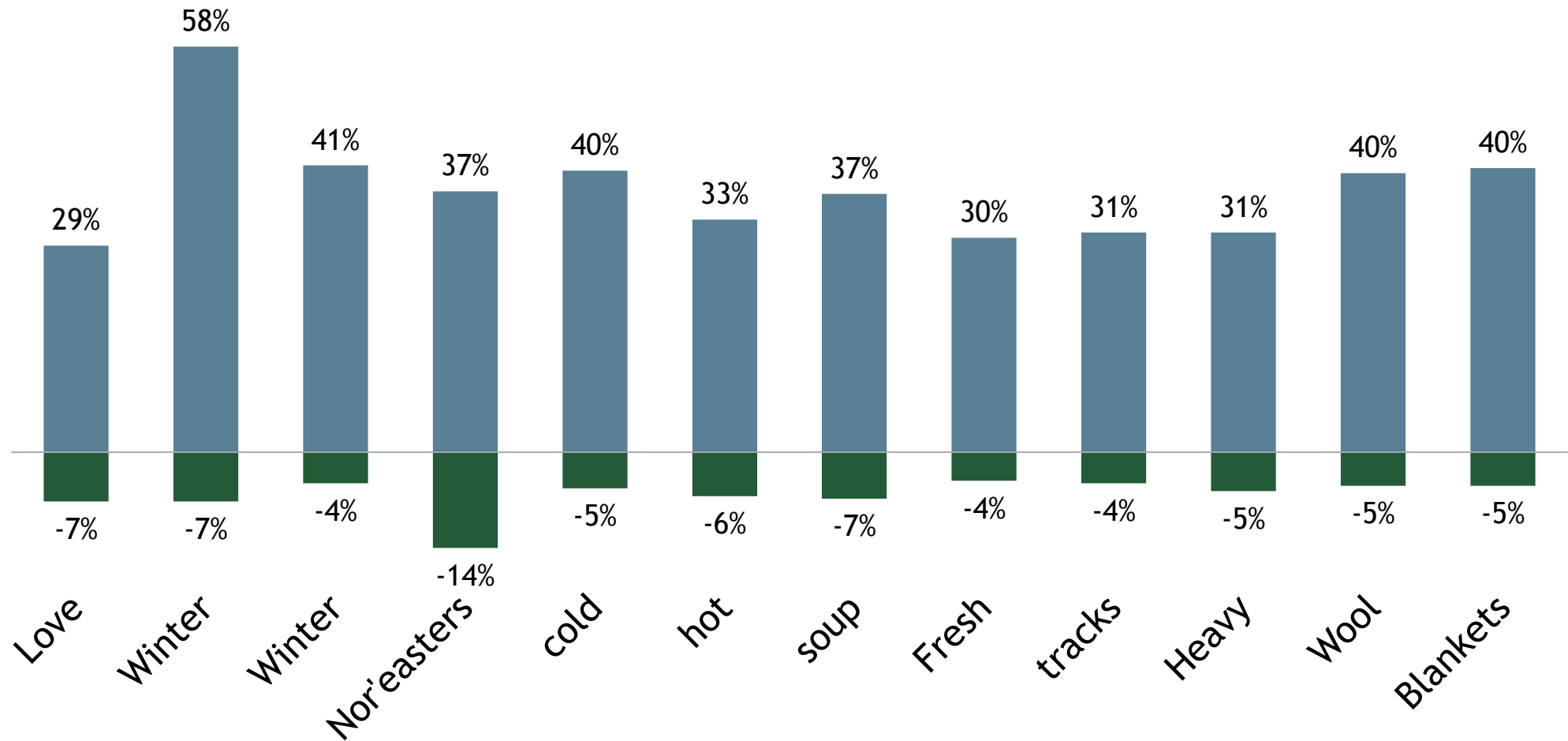
Phrase Relevance – Winter Manifesto 1: Provider



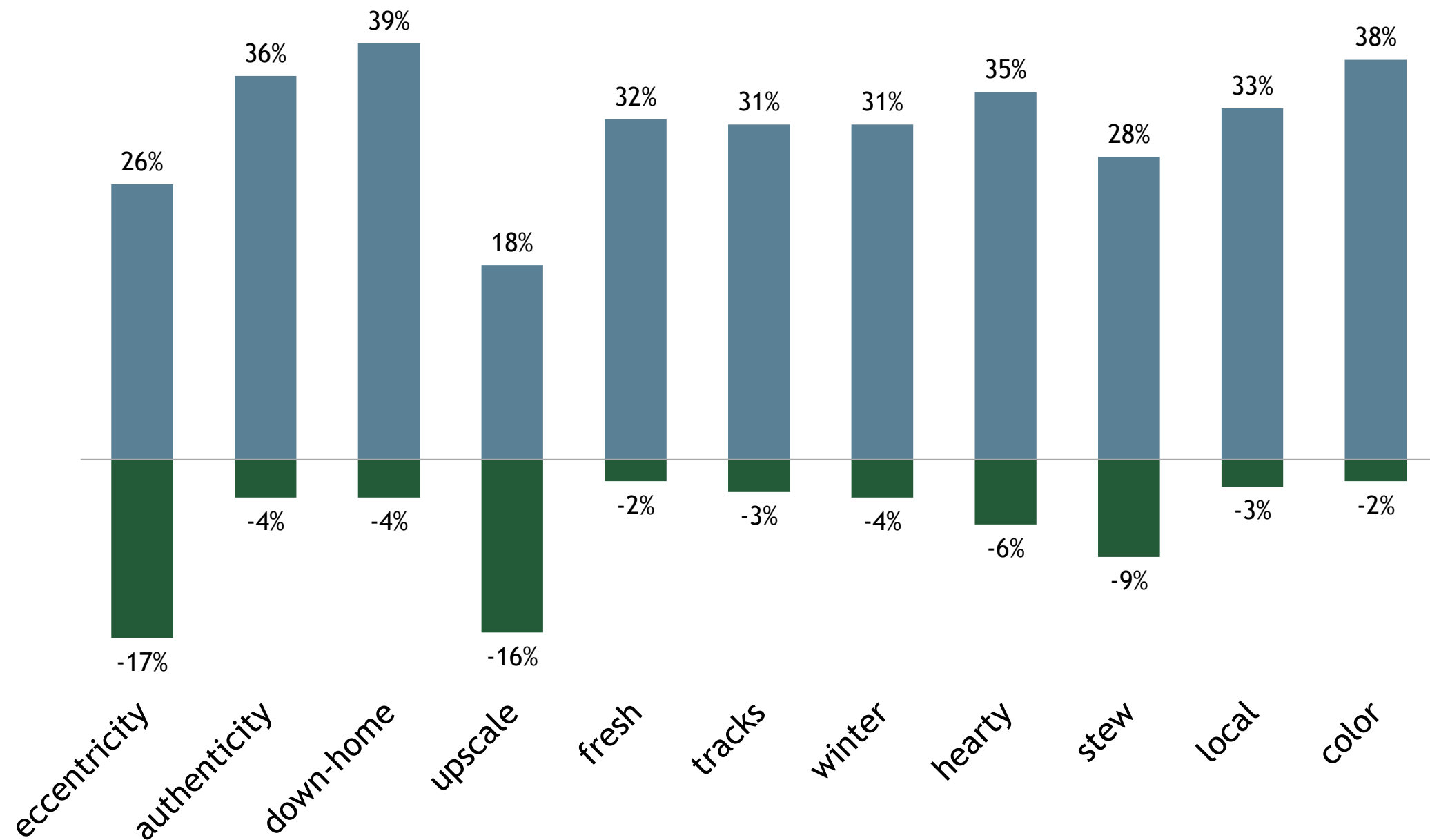
Phrase Relevance – Winter Manifesto 1: VT Vacation



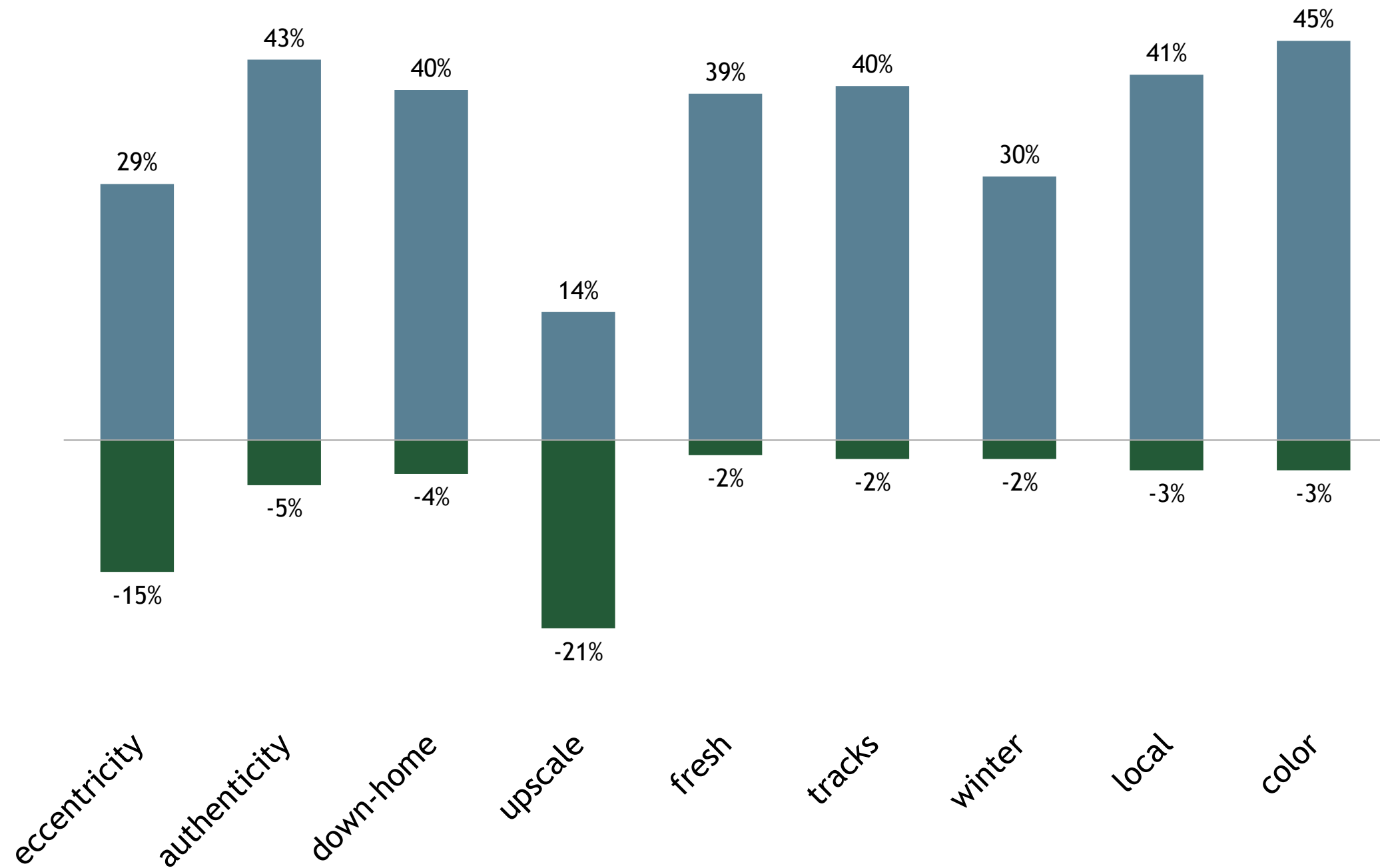
Phrase Relevance – Winter Manifesto 1: Non-VT Vacation



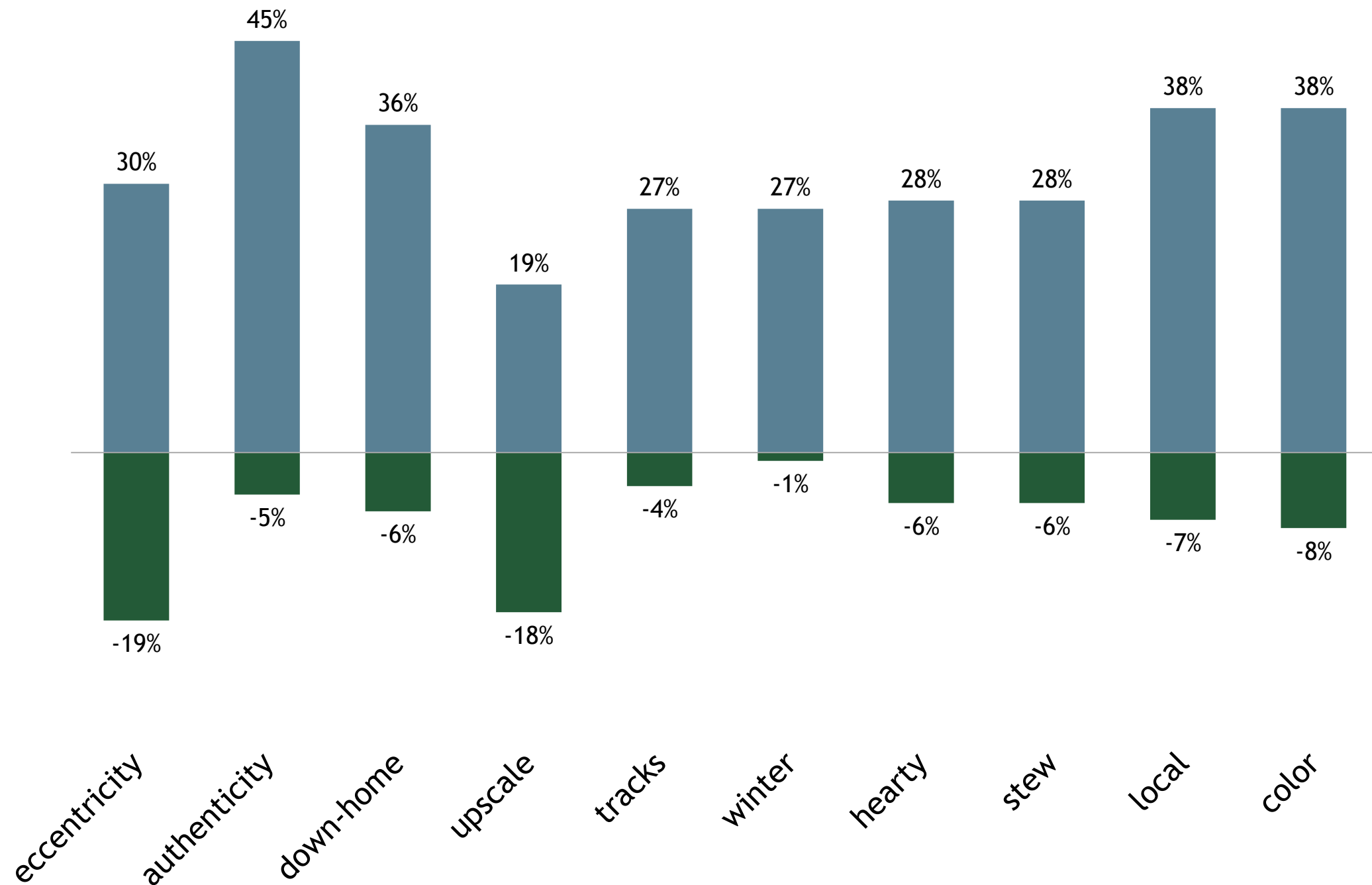
Phrase Relevance – Winter Manifesto 2: NYC



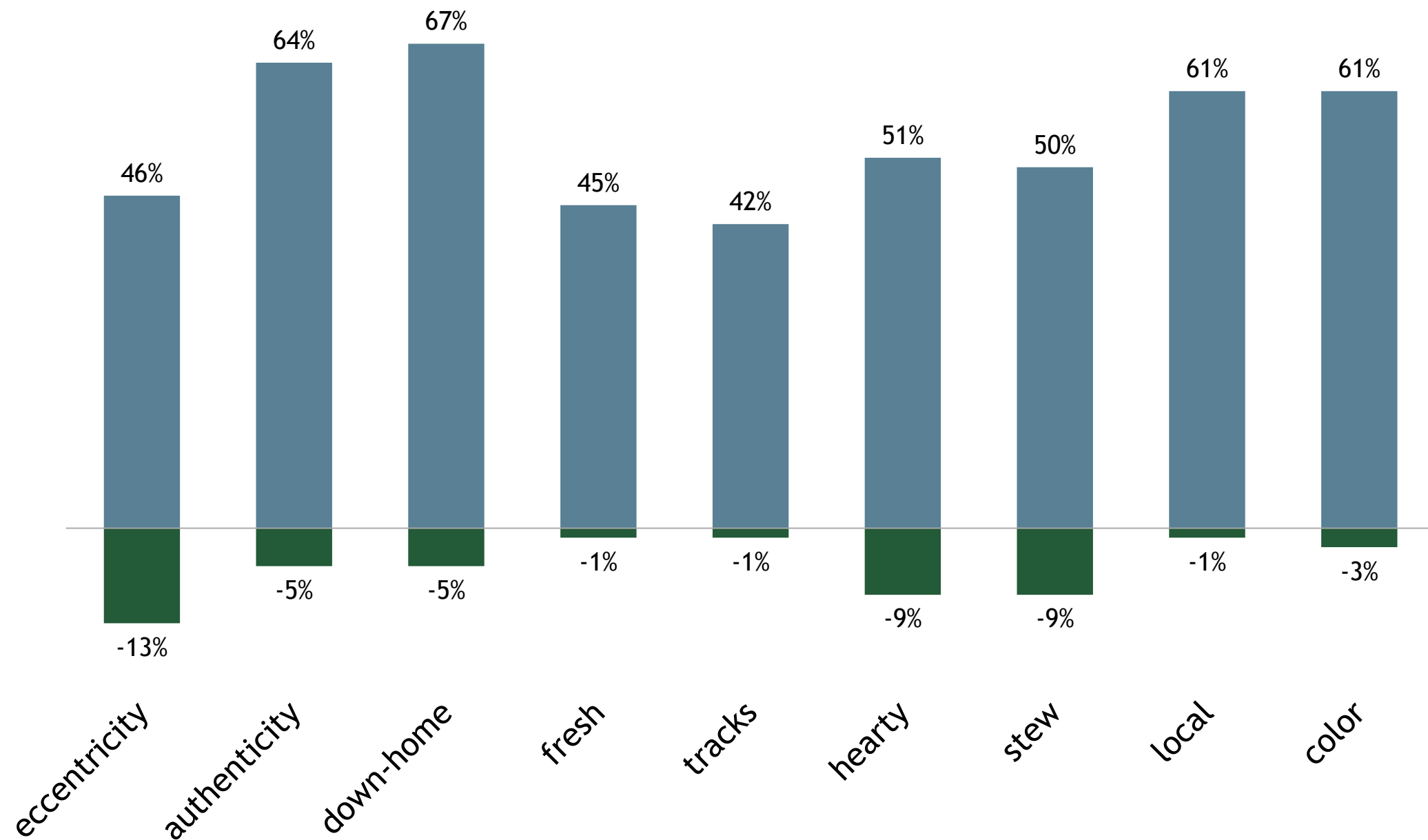
Phrase Relevance – Winter Manifesto 2: MA



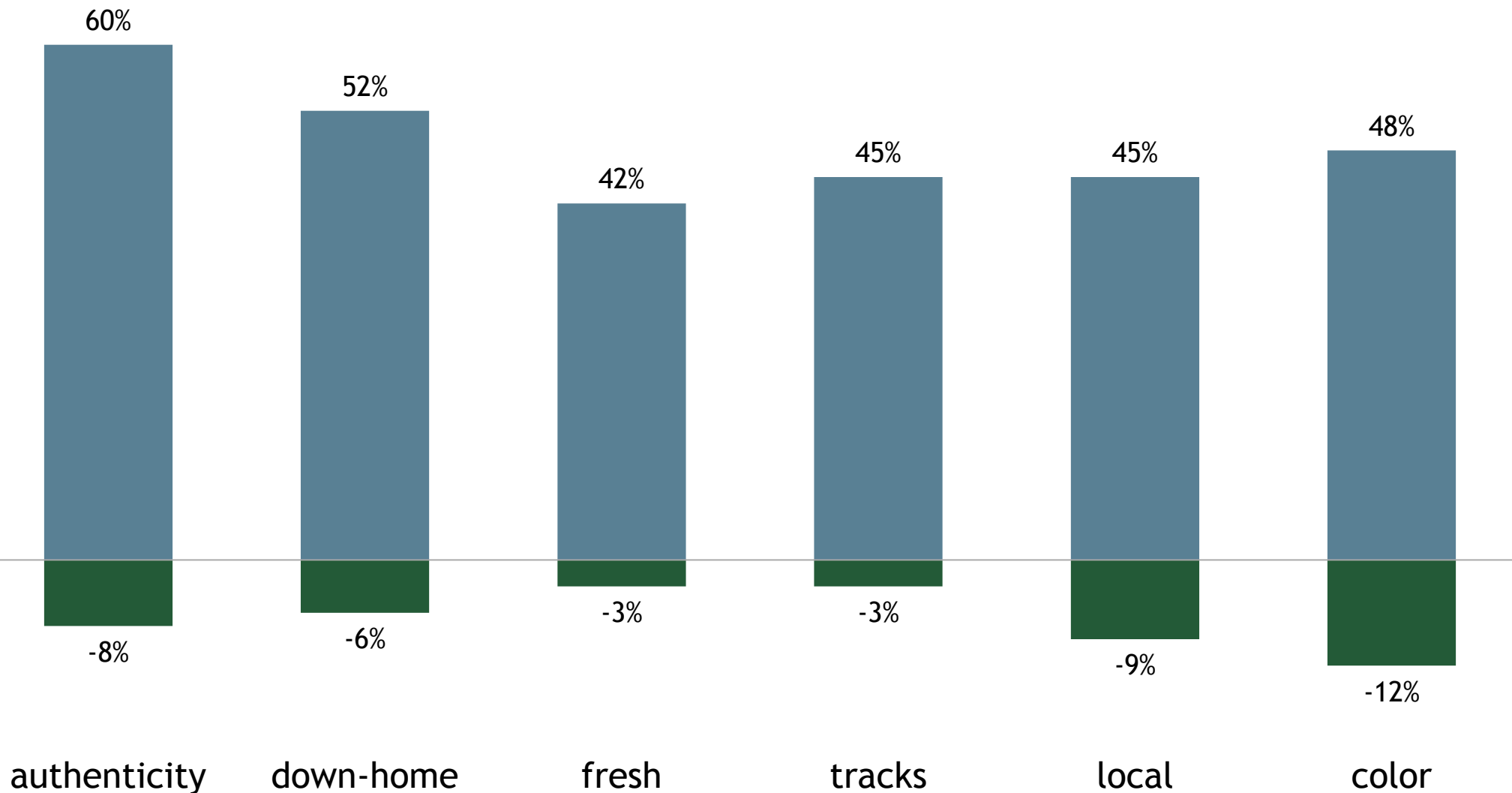
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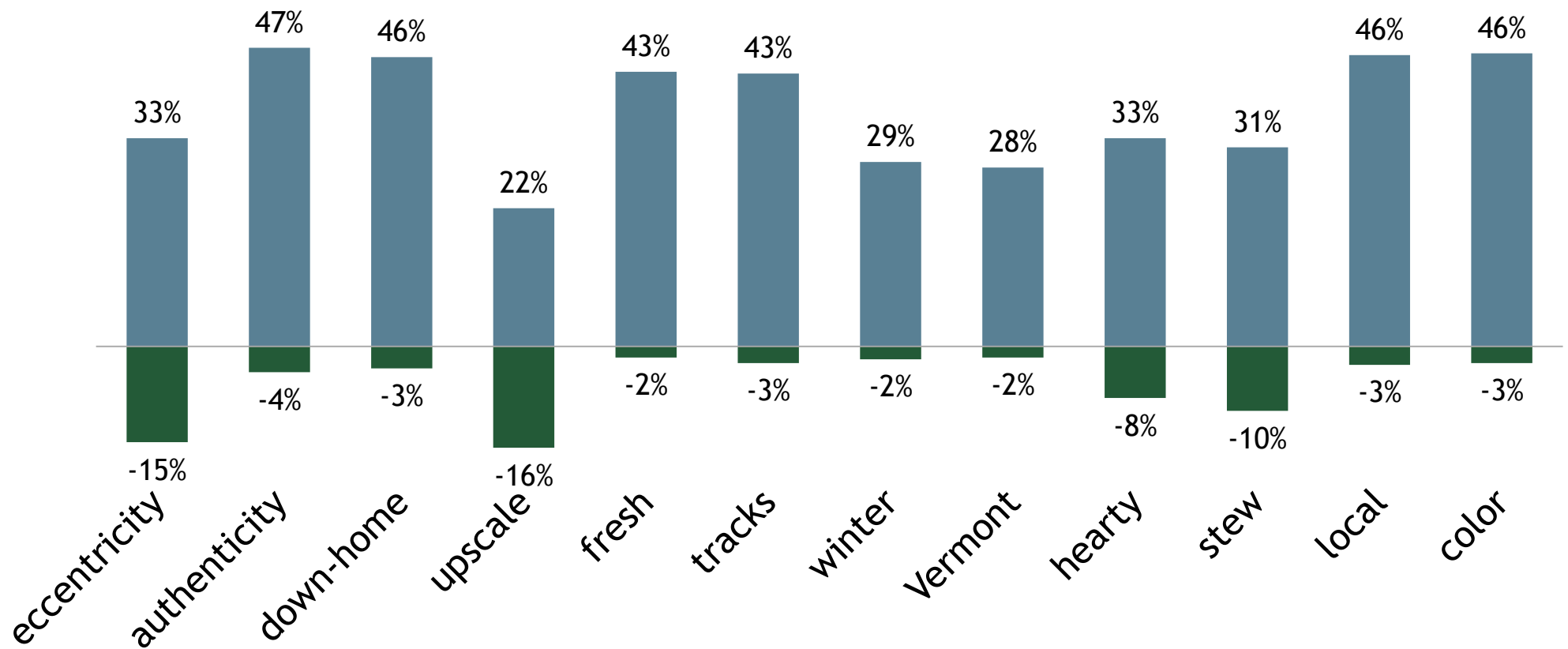
Phrase Relevance – Winter Manifesto 2: Resident



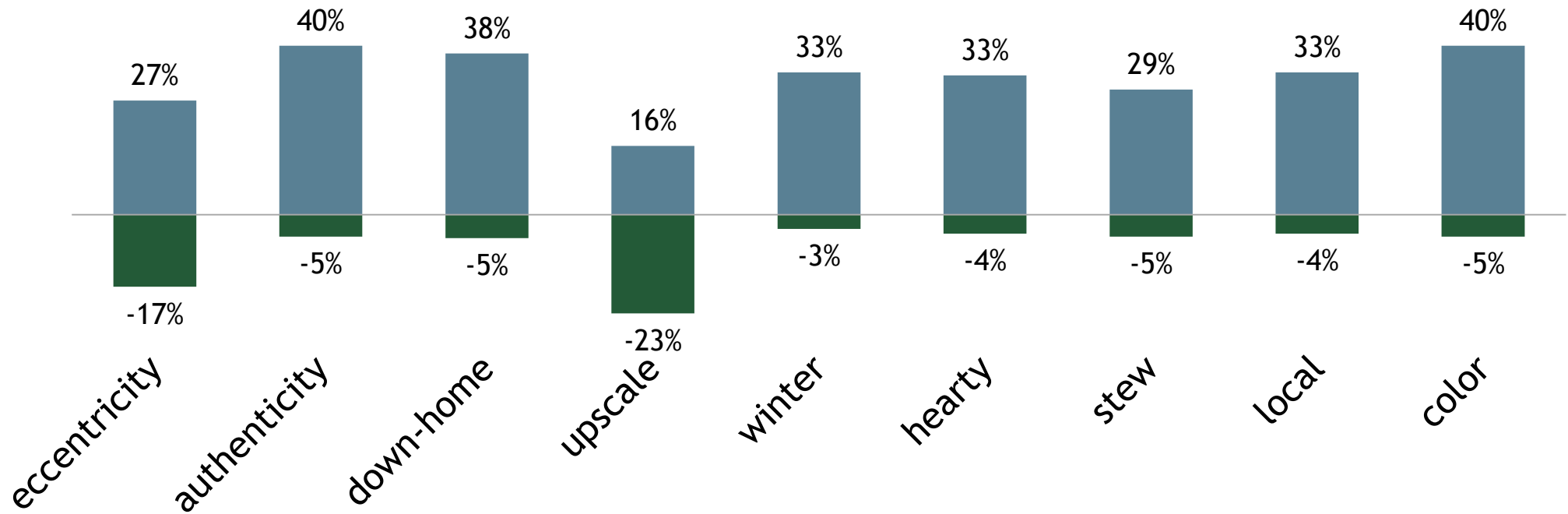
Phrase Relevance – Winter Manifesto 2: Provider



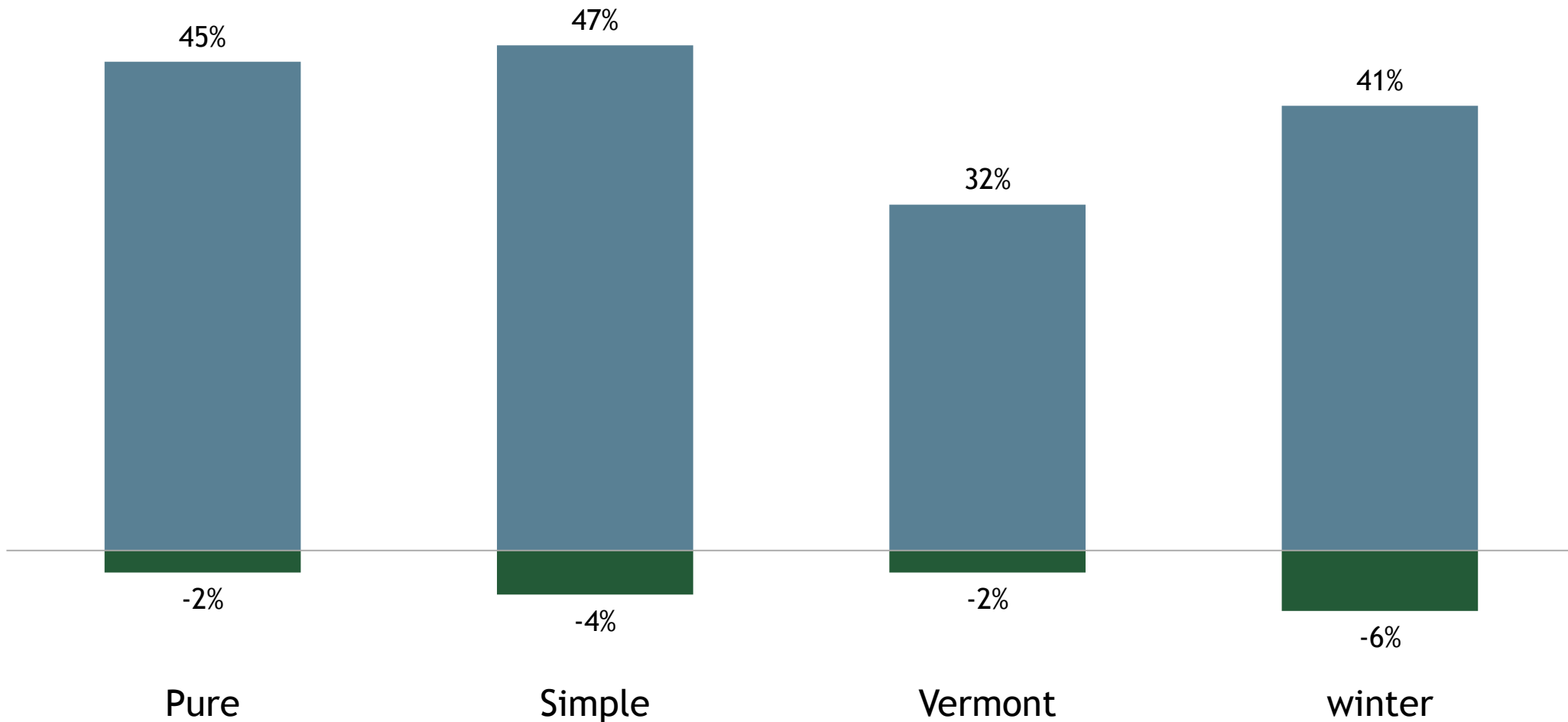
Phrase Relevance – Winter Manifesto 2: VT Vacation



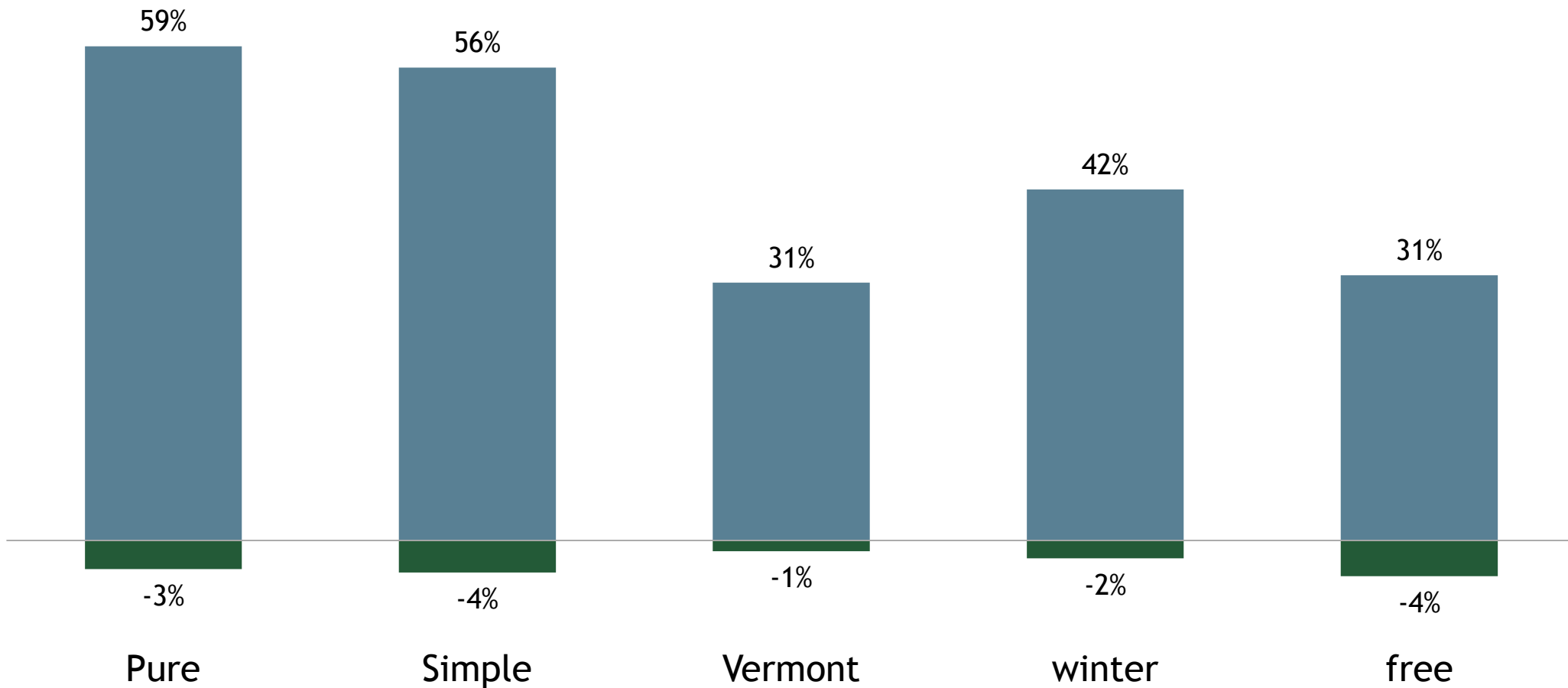
Phrase Relevance – Winter Manifesto 2: Non-VT Vacation



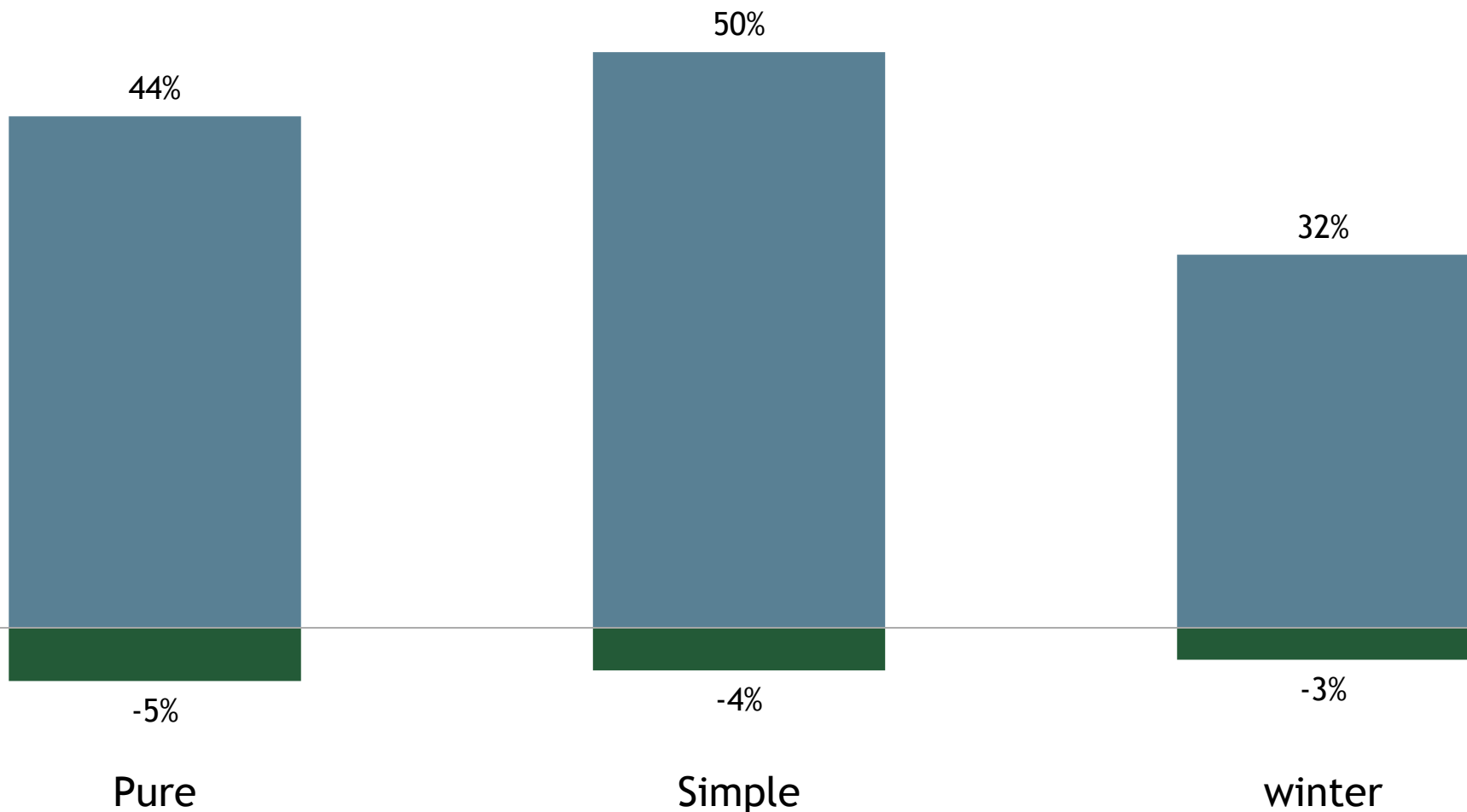
Phrase Relevance – Winter Manifesto 3: NYC



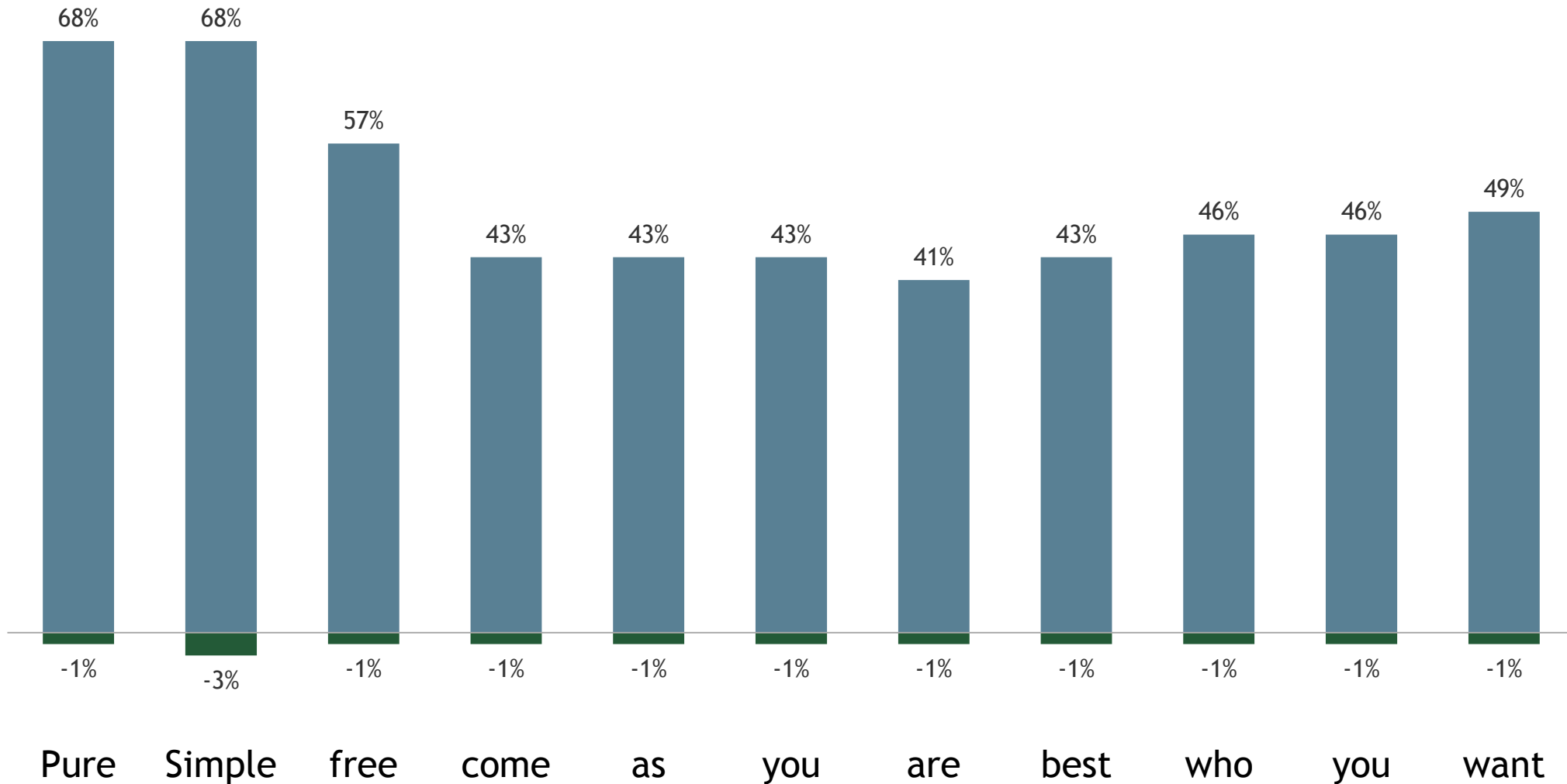
Phrase Relevance – Winter Manifesto 3: MA



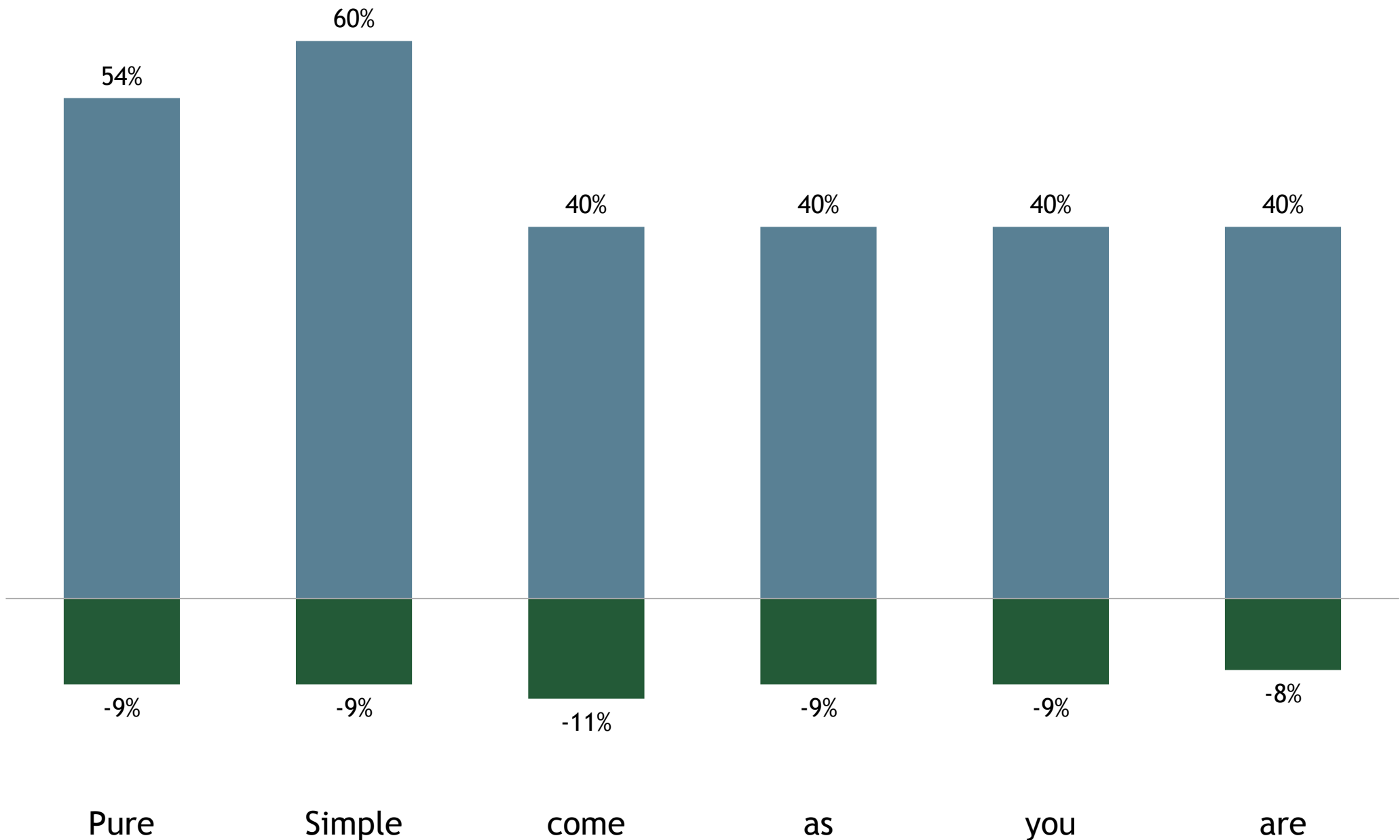
Phrase Relevance – Winter Manifesto 3: CAN



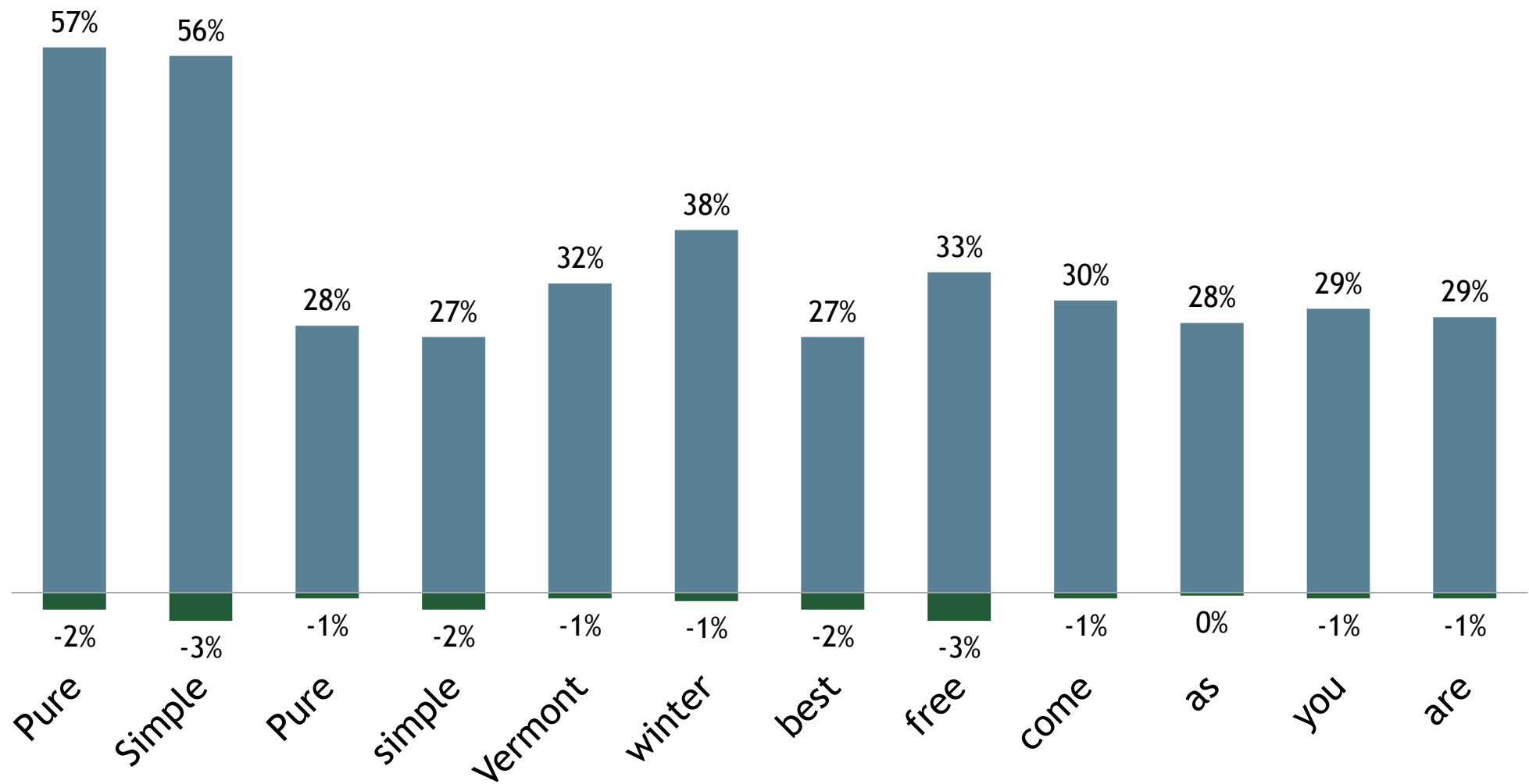
Phrase Relevance – Winter Manifesto 3: Resident



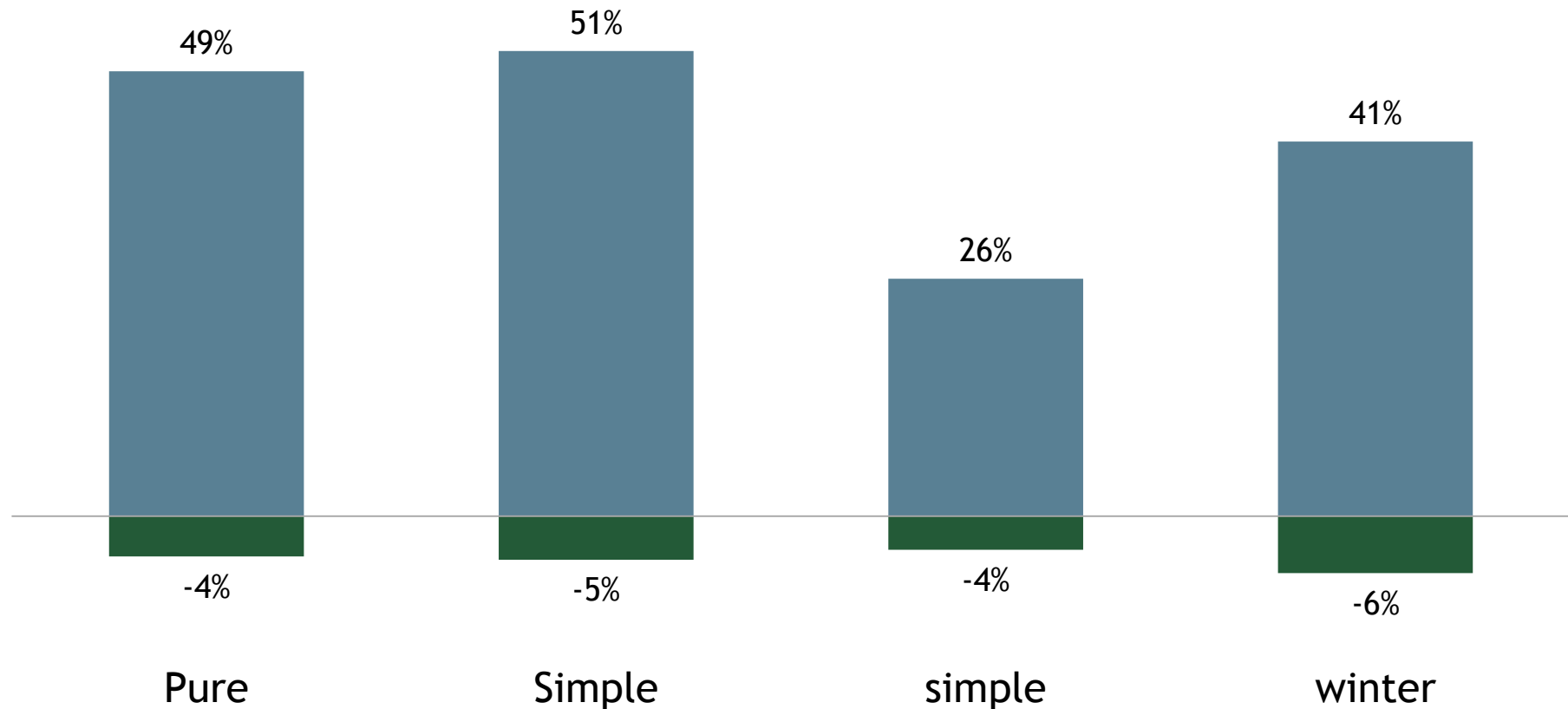
Phrase Relevance – Winter Manifesto 3: Provider



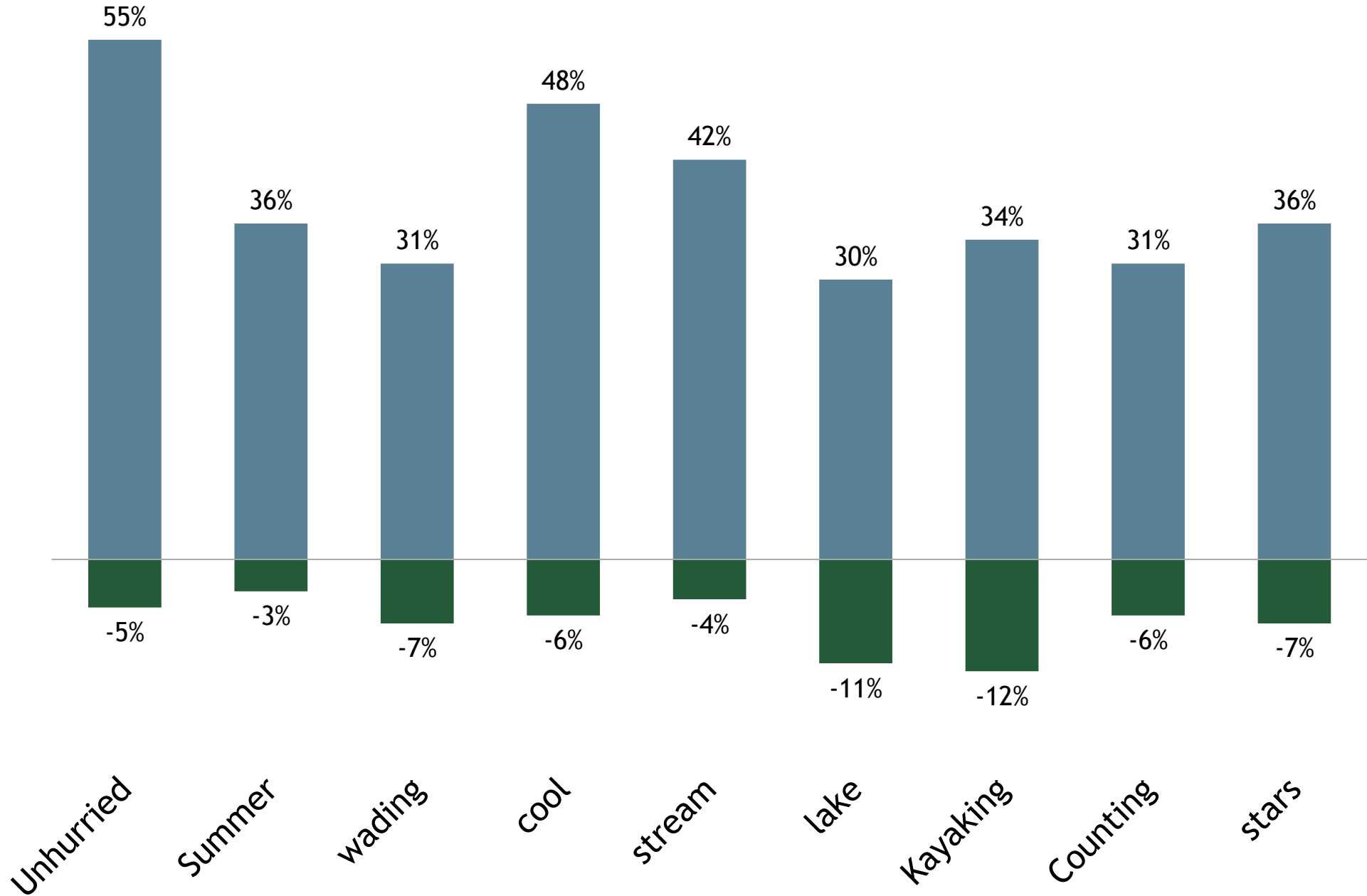
Phrase Relevance – Winter Manifesto 3: VT Vacation



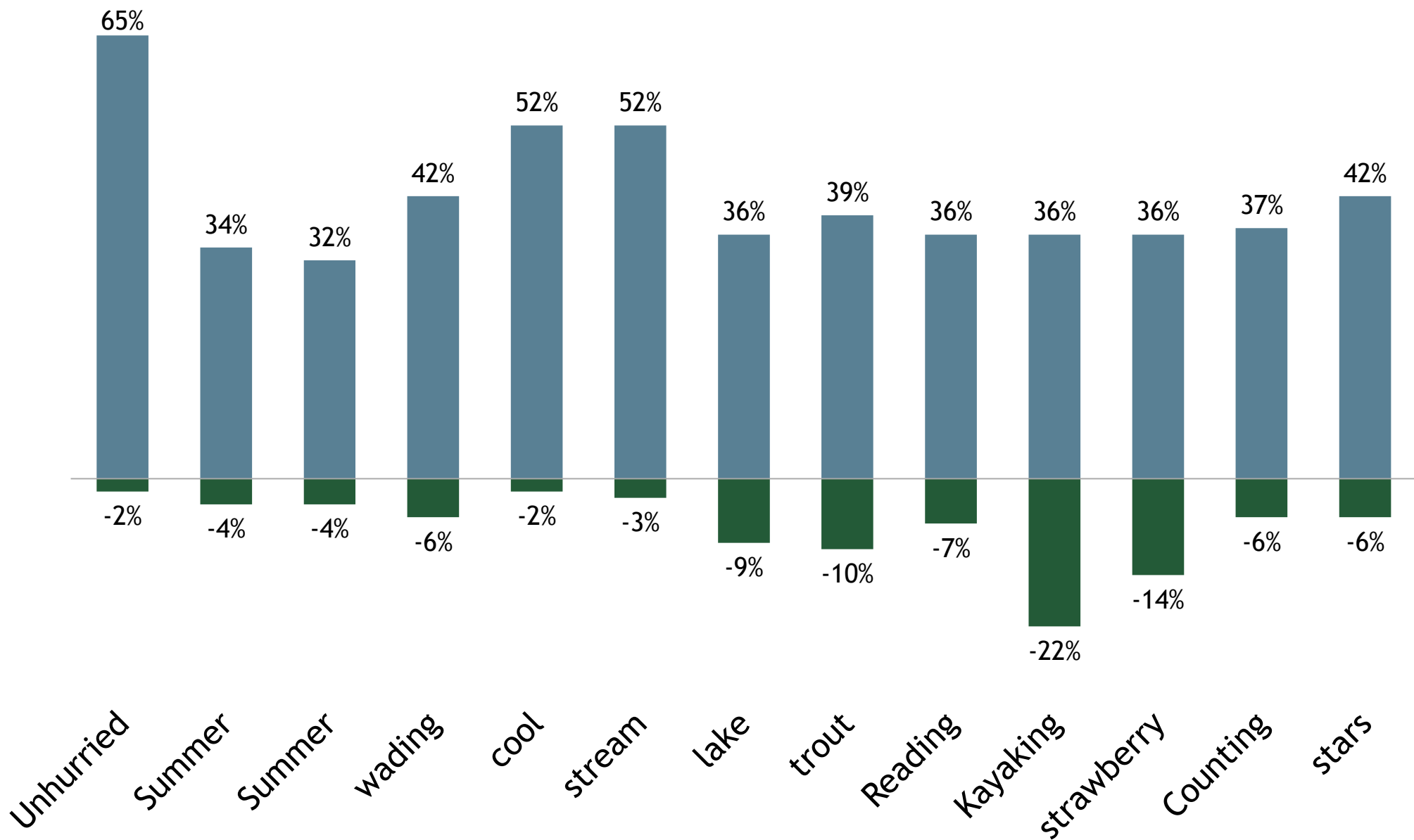
Phrase Relevance – Winter Manifesto 3: Non-VT Vacation



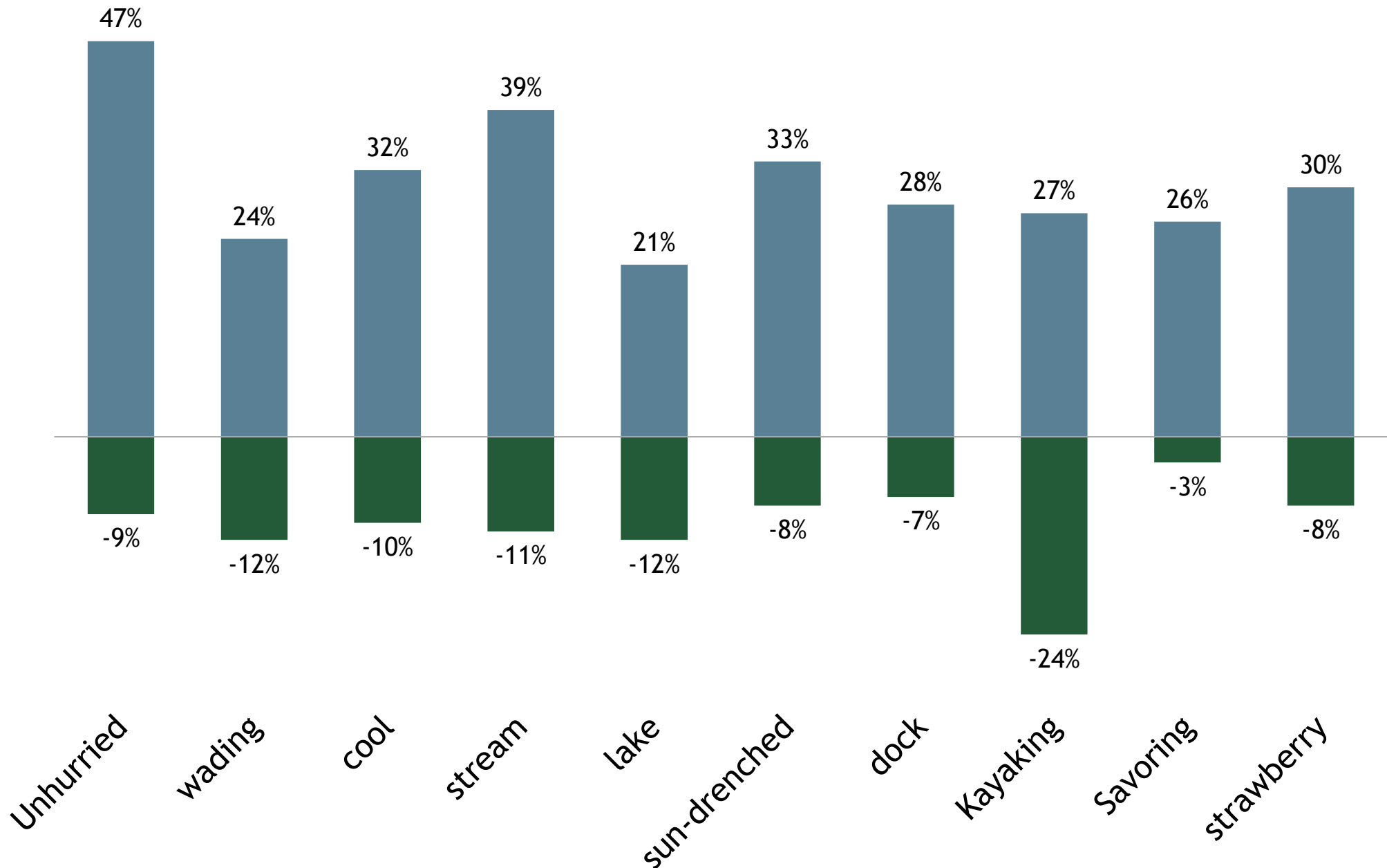
Phrase Relevance – Summer Manifesto 1: NYC



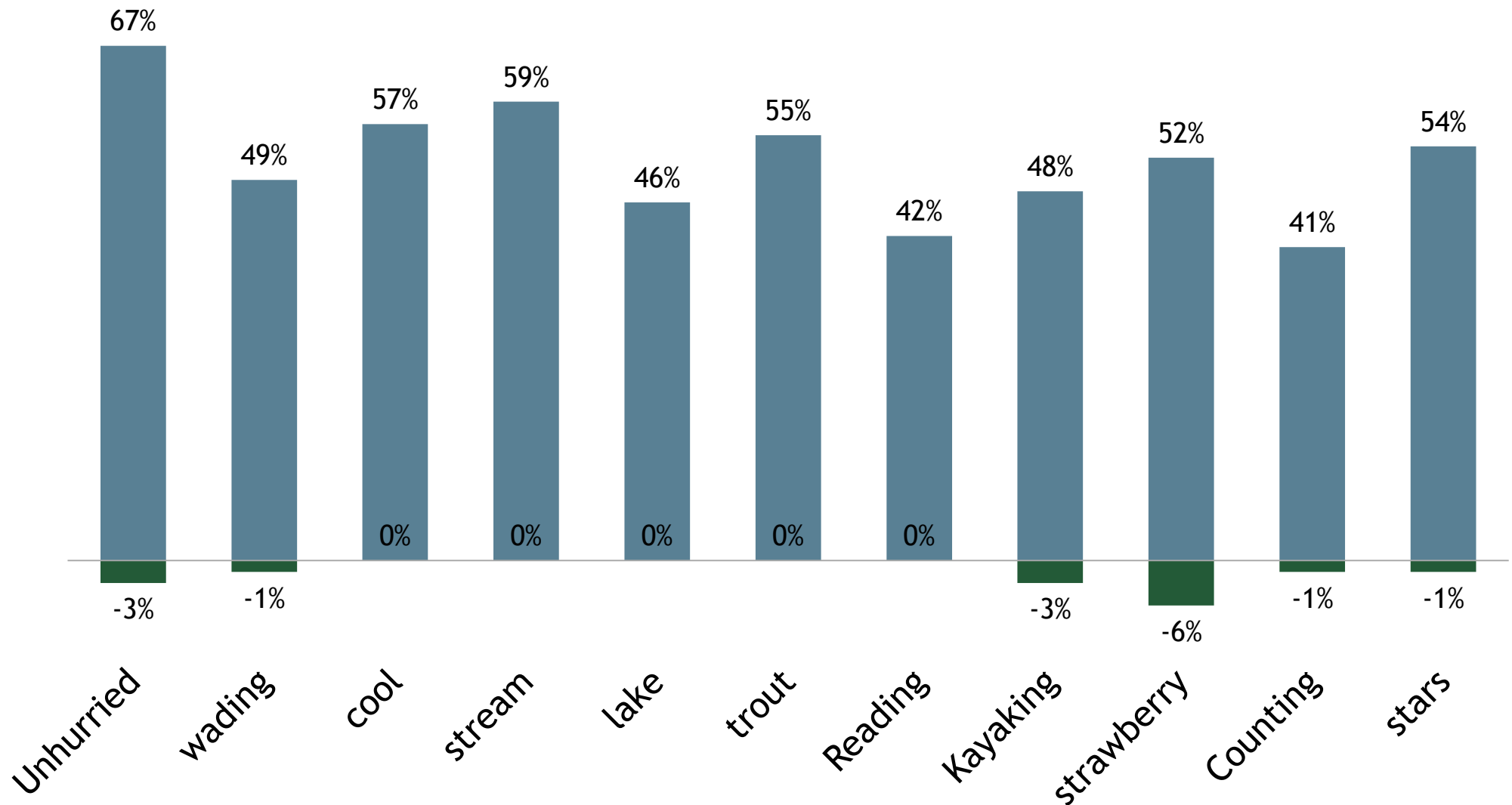
Phrase Relevance – Summer Manifesto 1: MA



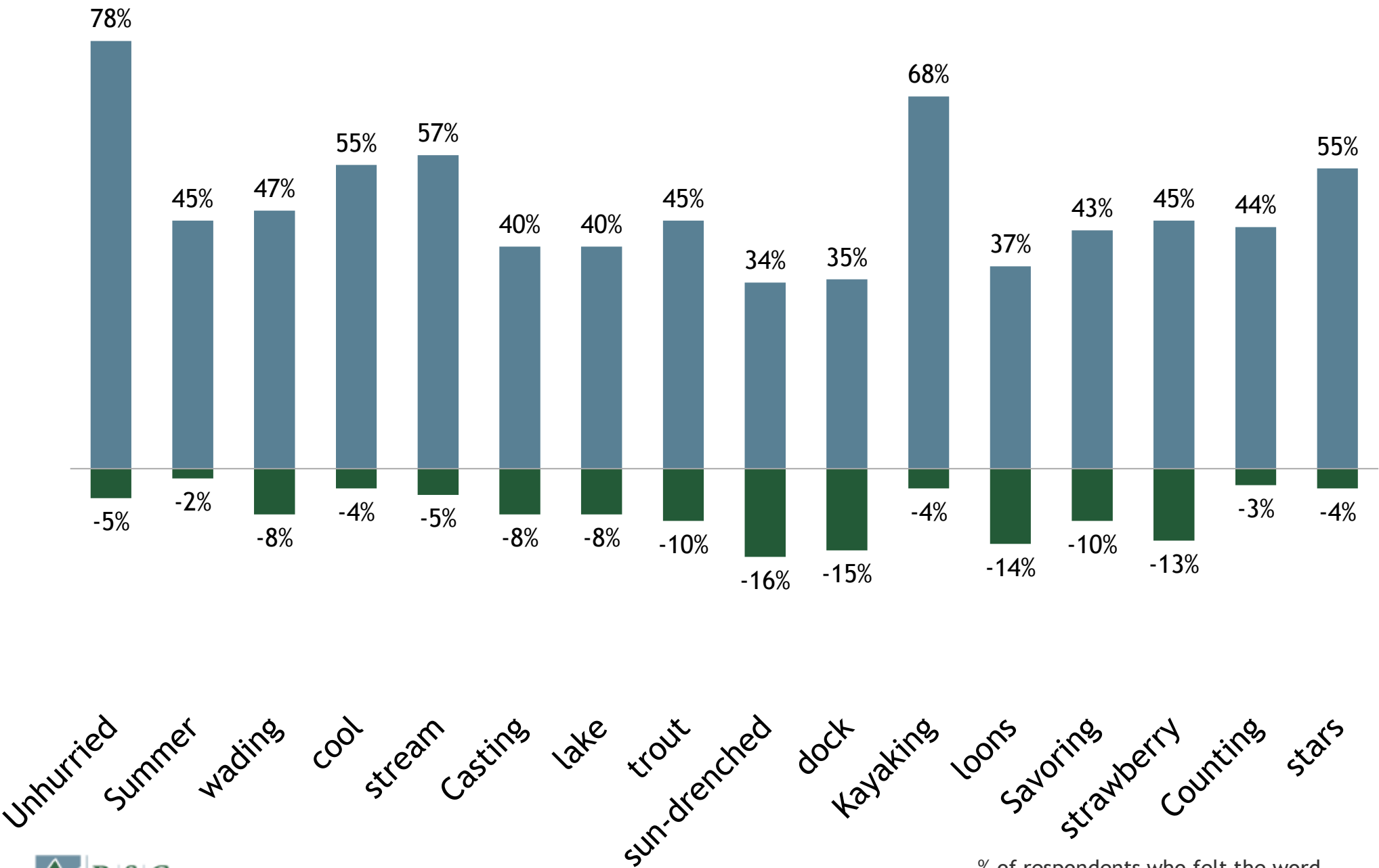
Phrase Relevance – Summer Manifesto 1: CAN



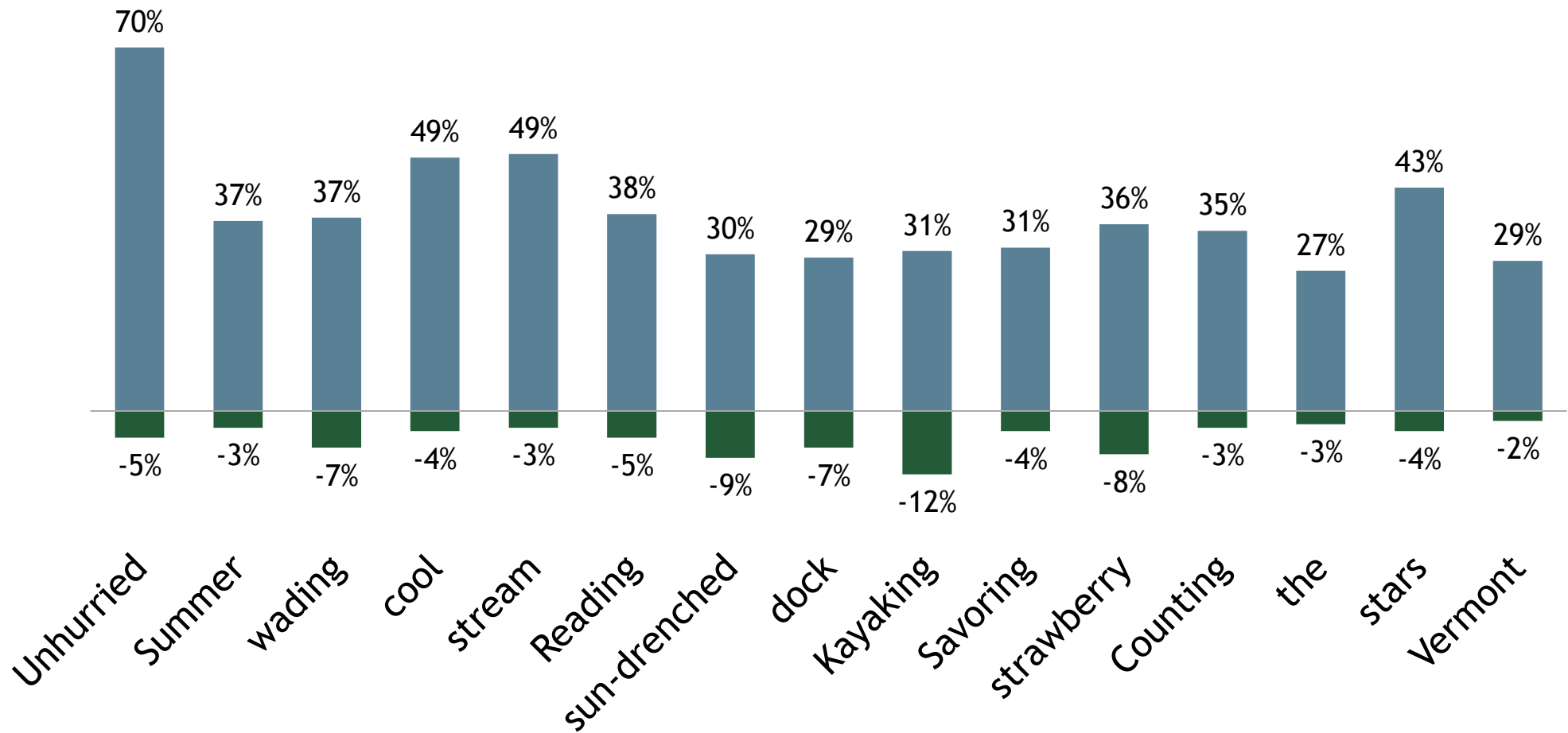
Phrase Relevance – Summer Manifesto 1: Resident



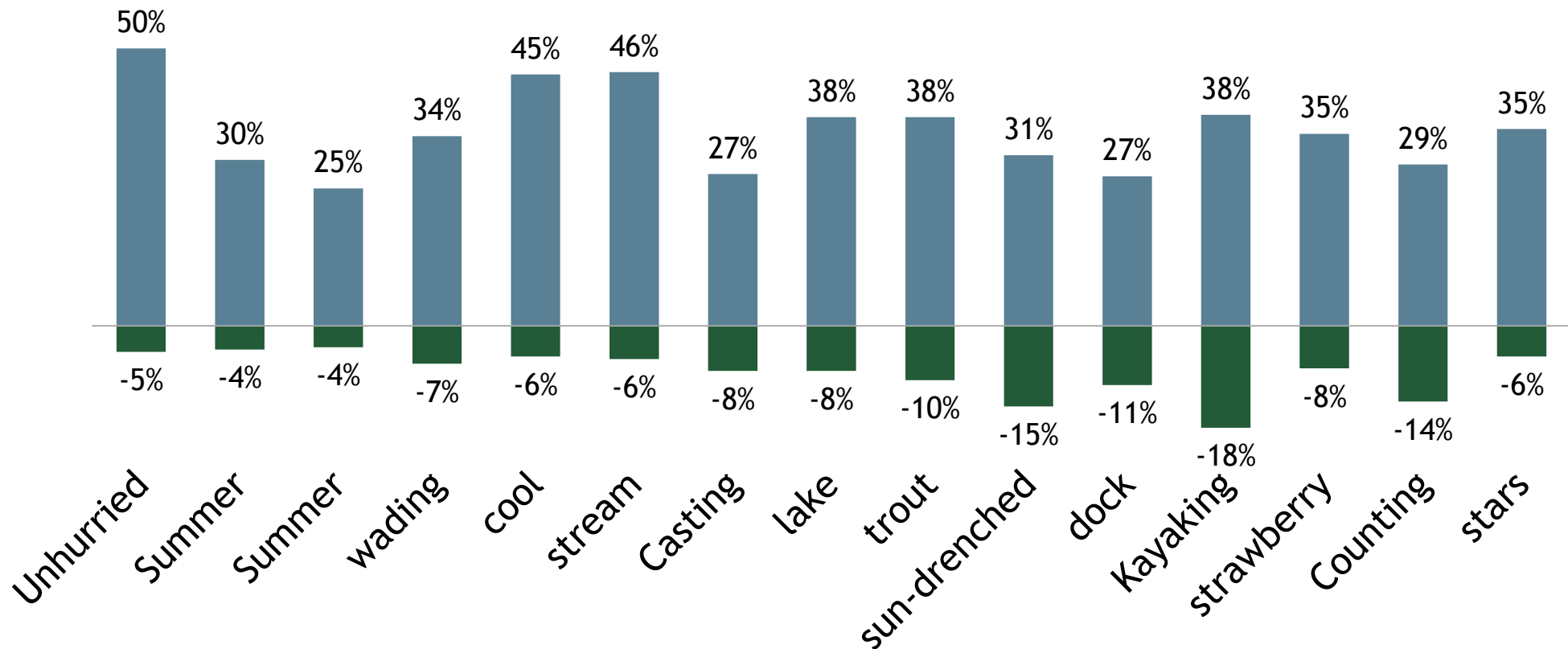
Phrase Relevance – Summer Manifesto 1: Provider



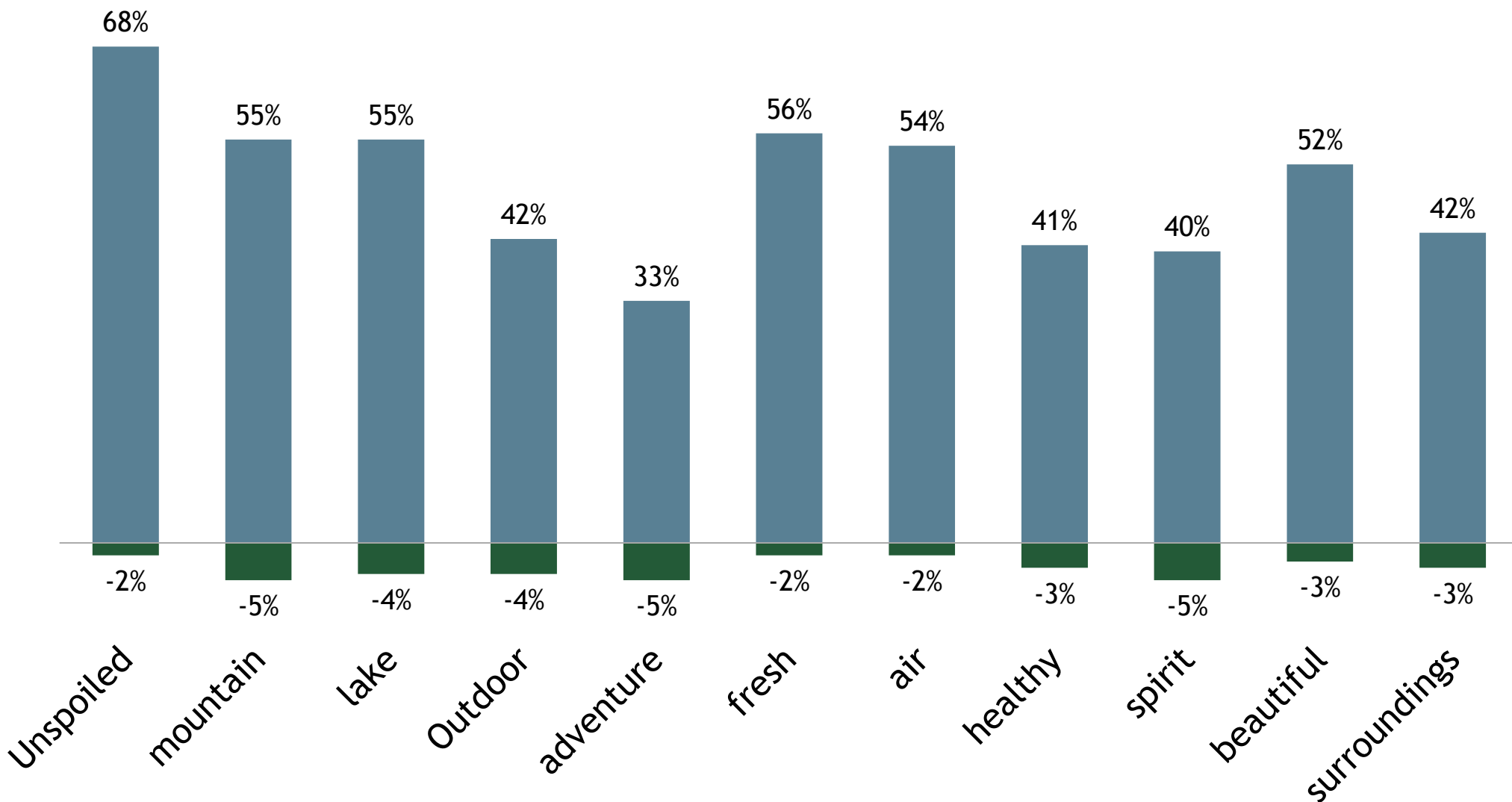
Phrase Relevance – Summer Manifesto 1: VT Vacation



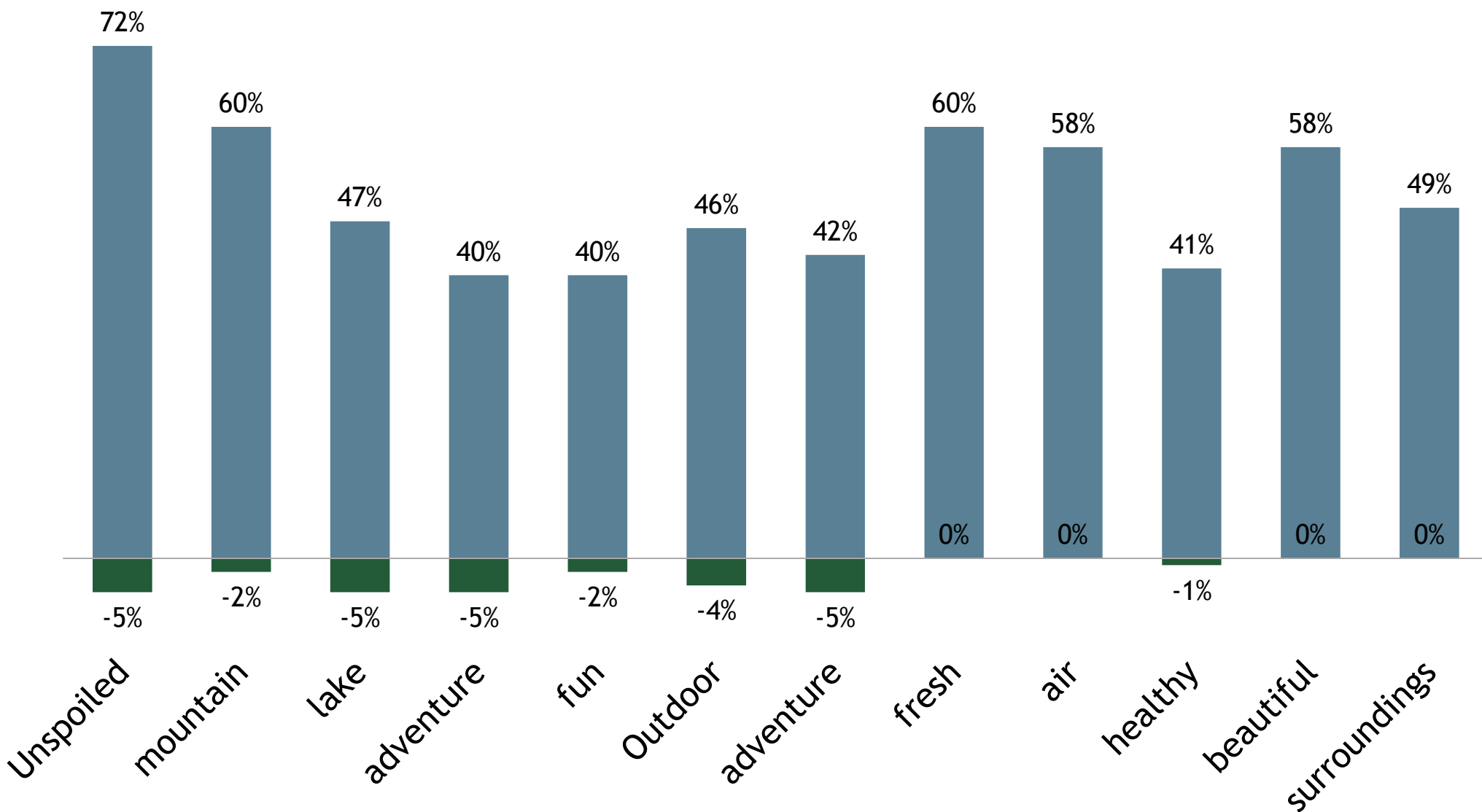
Phrase Relevance – Summer Manifesto 1: Non-VT Vacation



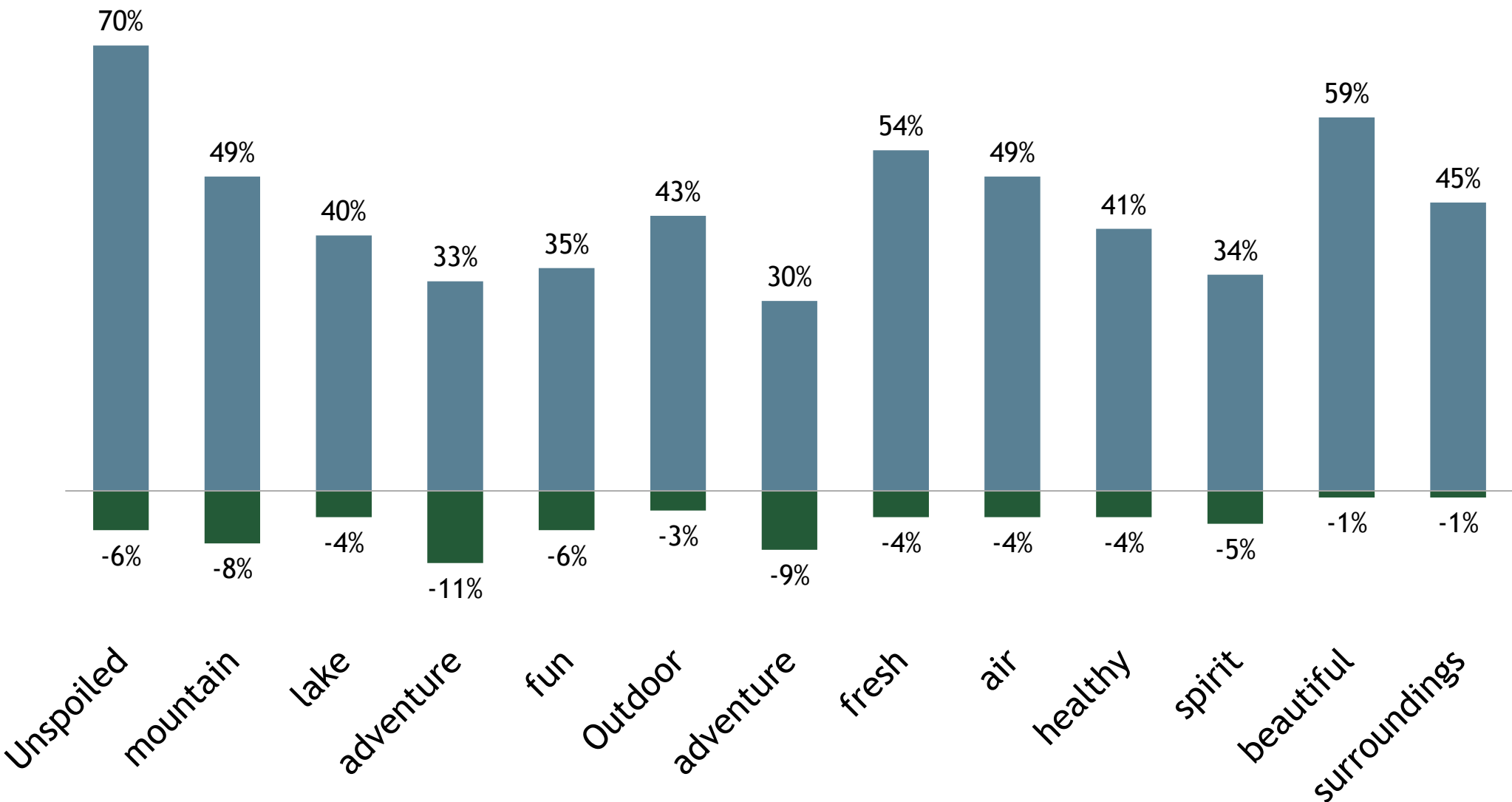
Phrase Relevance – Summer Manifesto 2: NYC



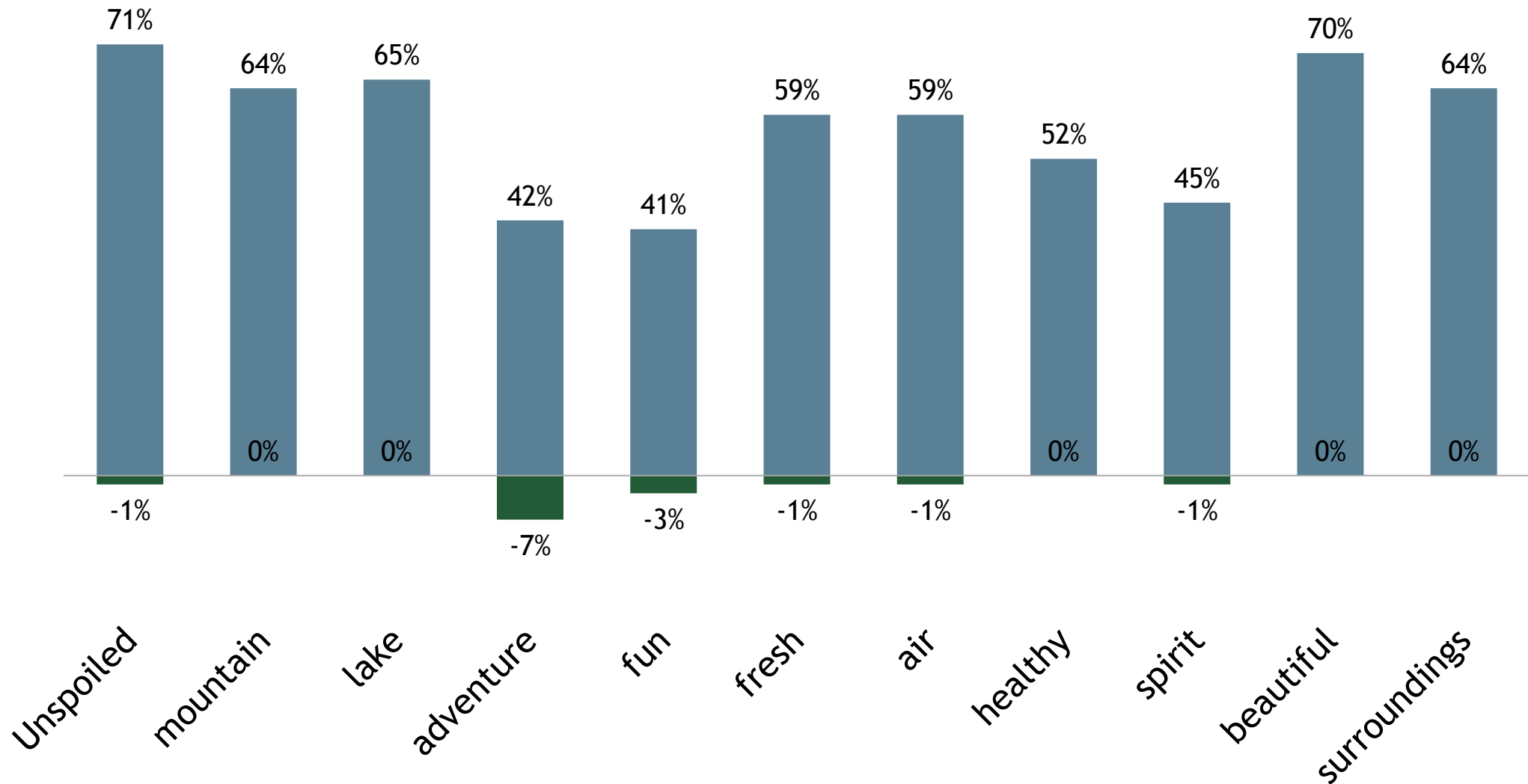
Phrase Relevance – Summer Manifesto 2: MA



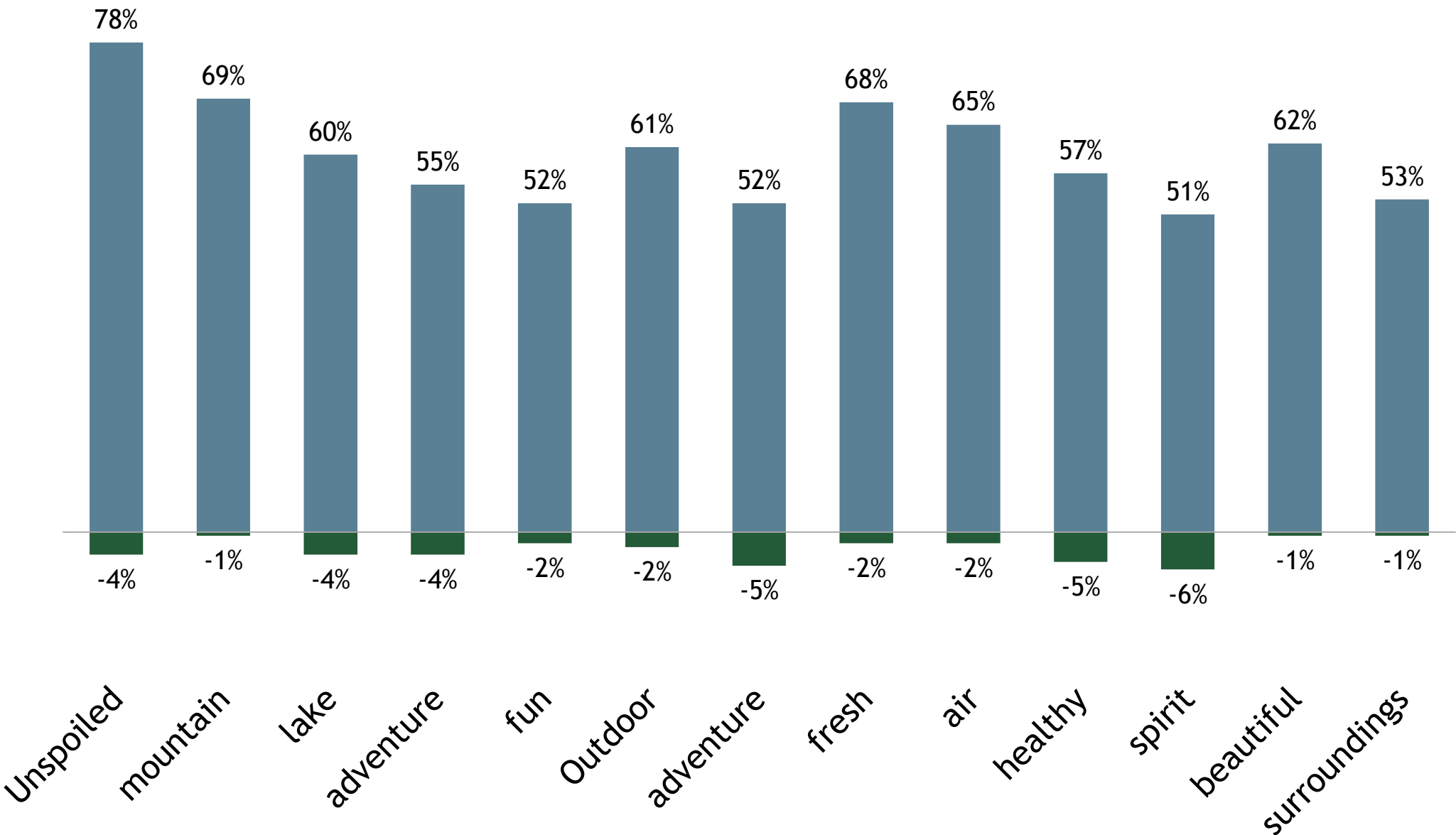
Phrase Relevance – Summer Manifesto 2: CAN



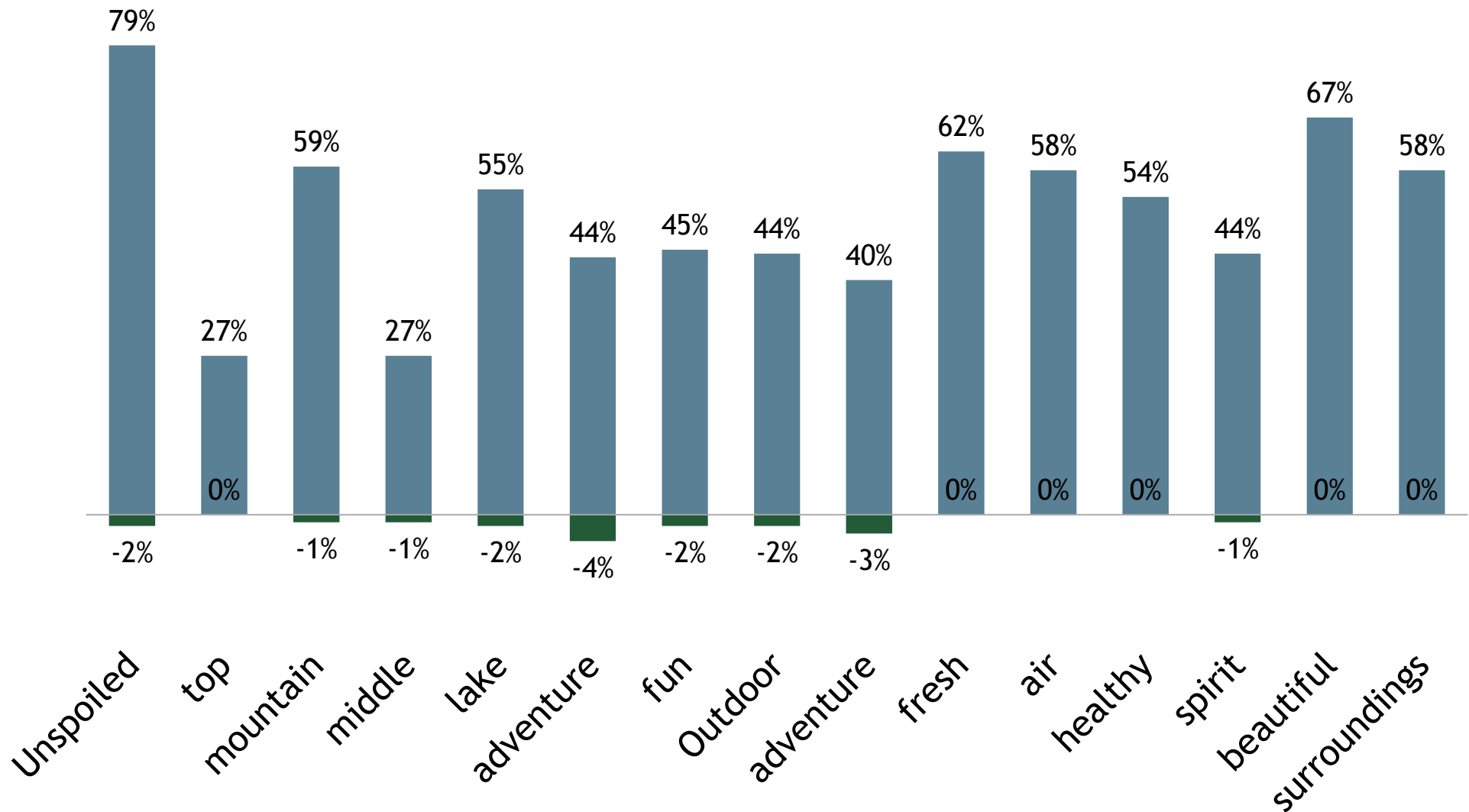
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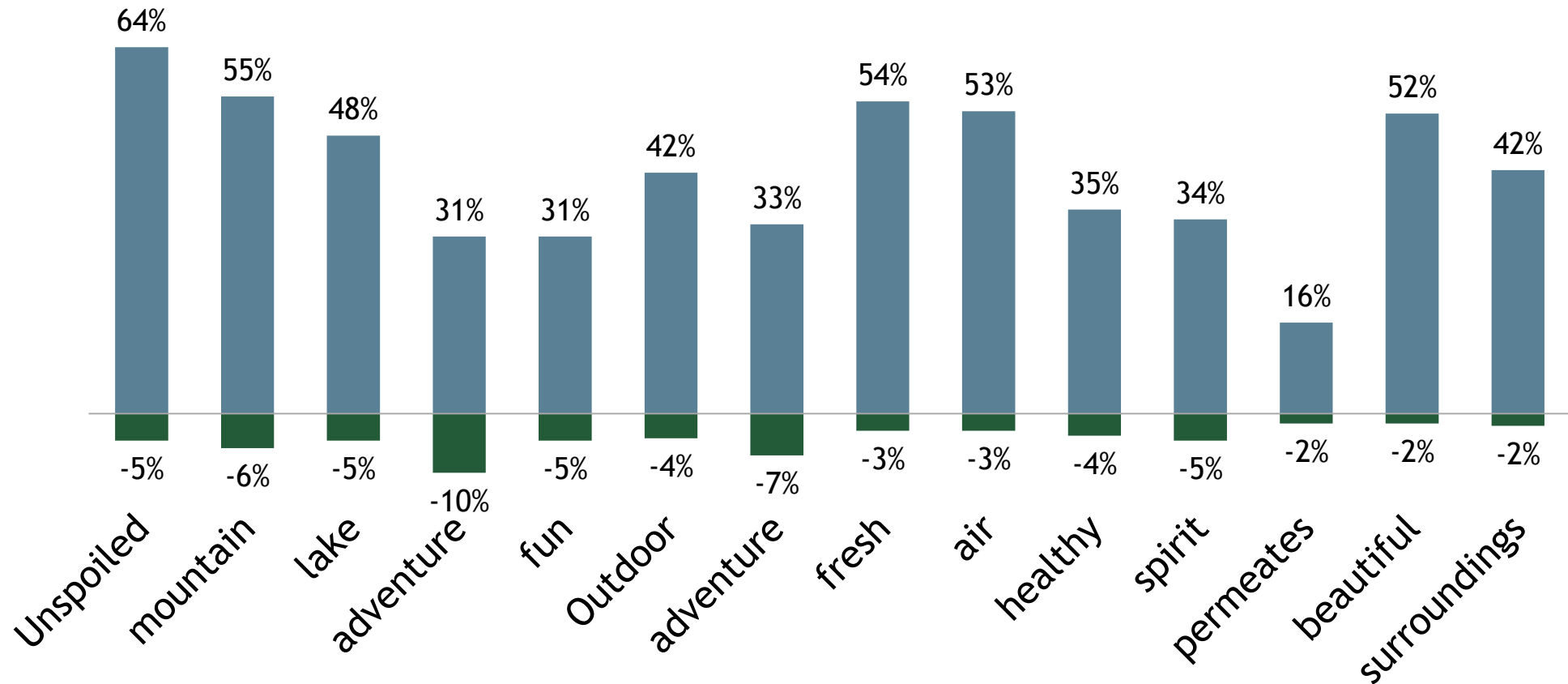
Phrase Relevance – Summer Manifesto 2: Provider



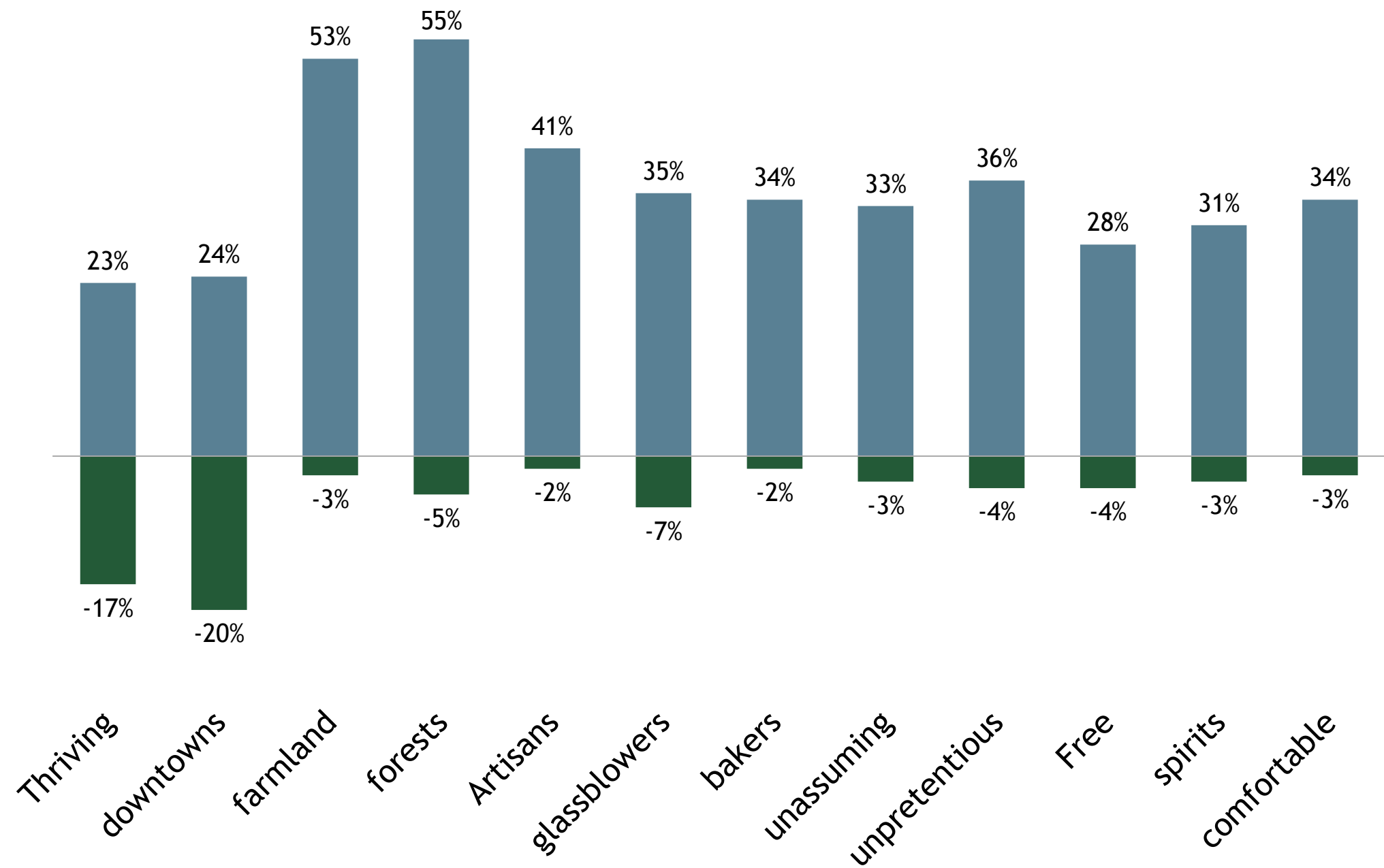
Phrase Relevance – Summer Manifesto 2: VT Vacation



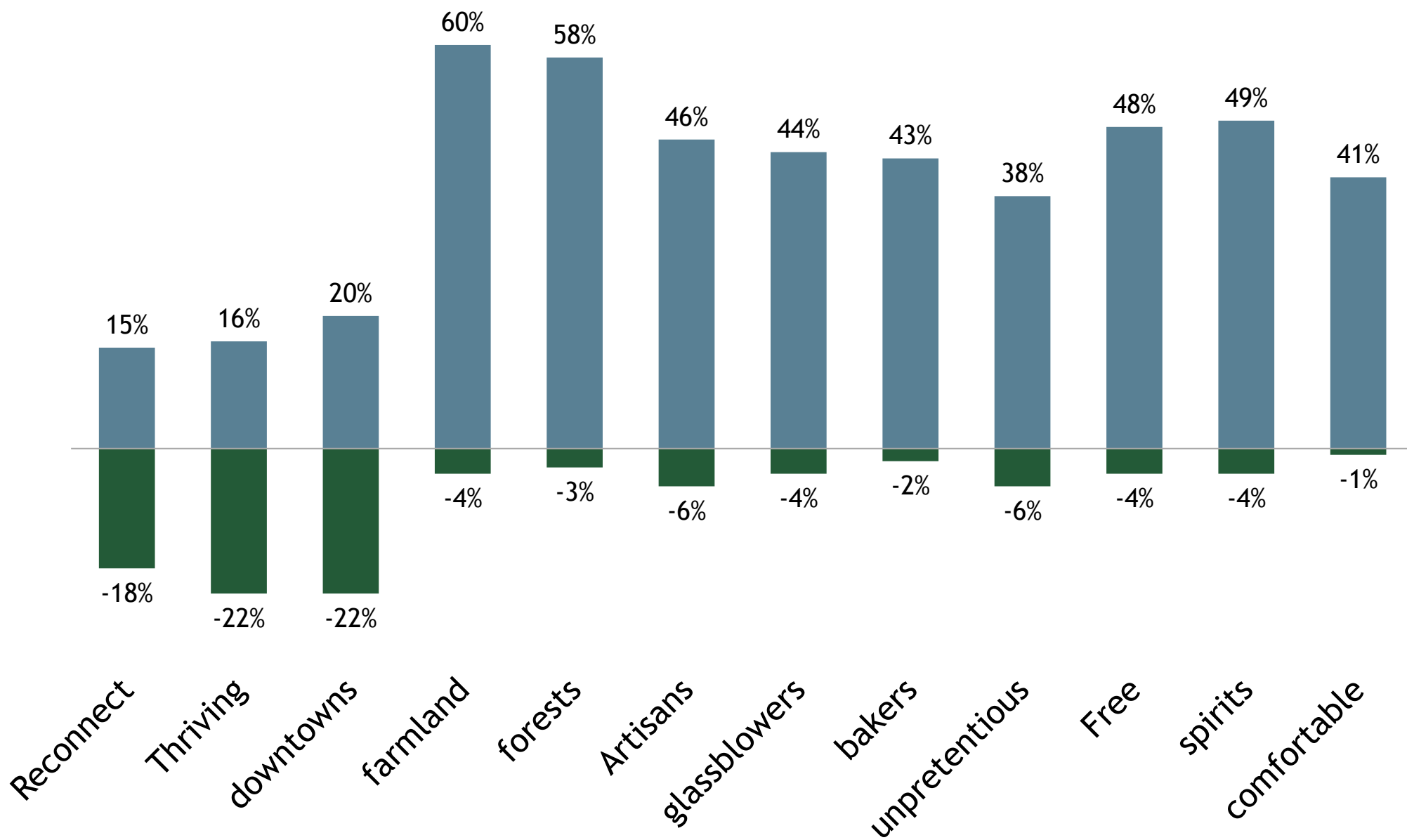
Phrase Relevance – Summer Manifesto 2: Non-VT Vacation



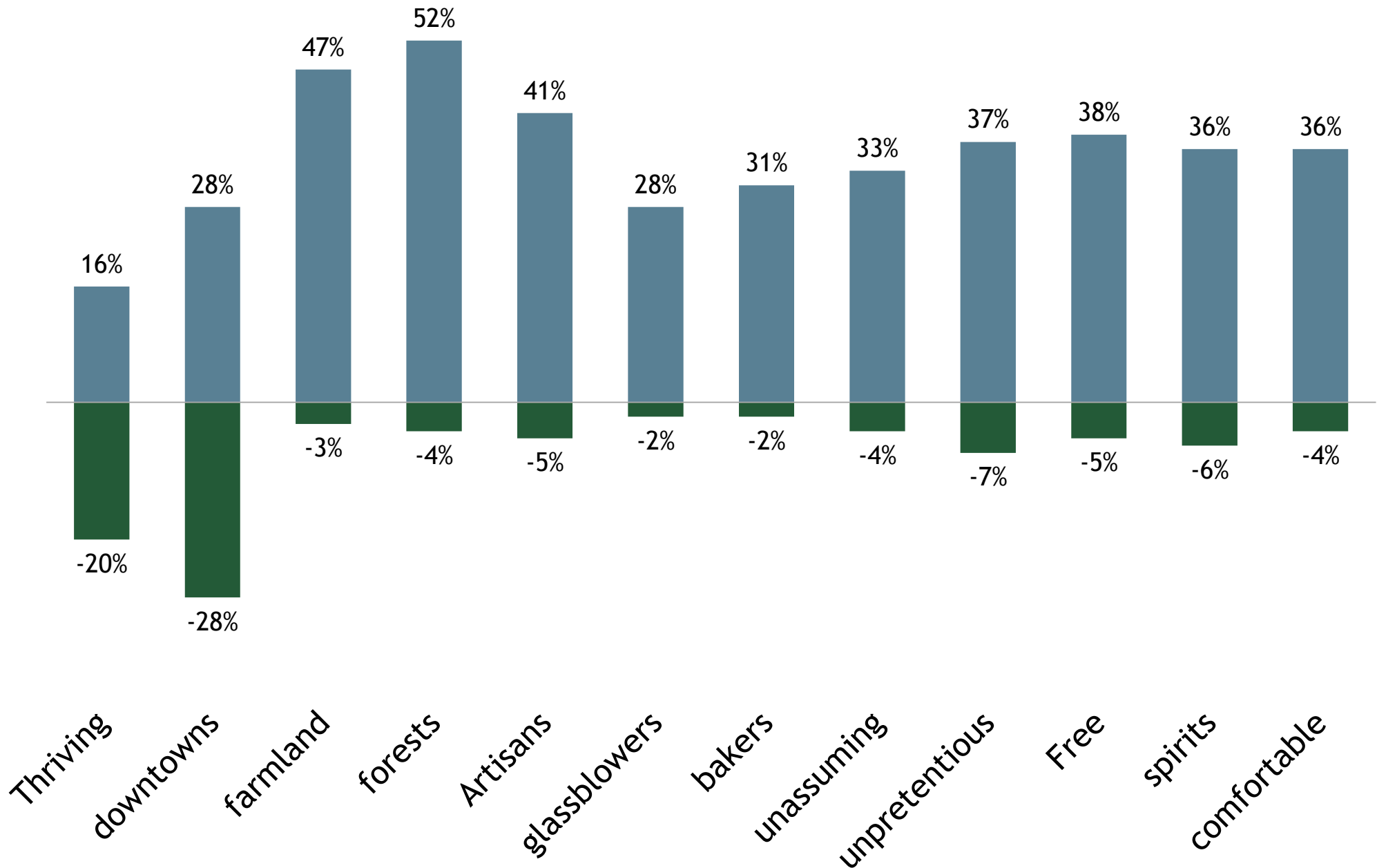
Phrase Relevance – Summer Manifesto 3: NYC



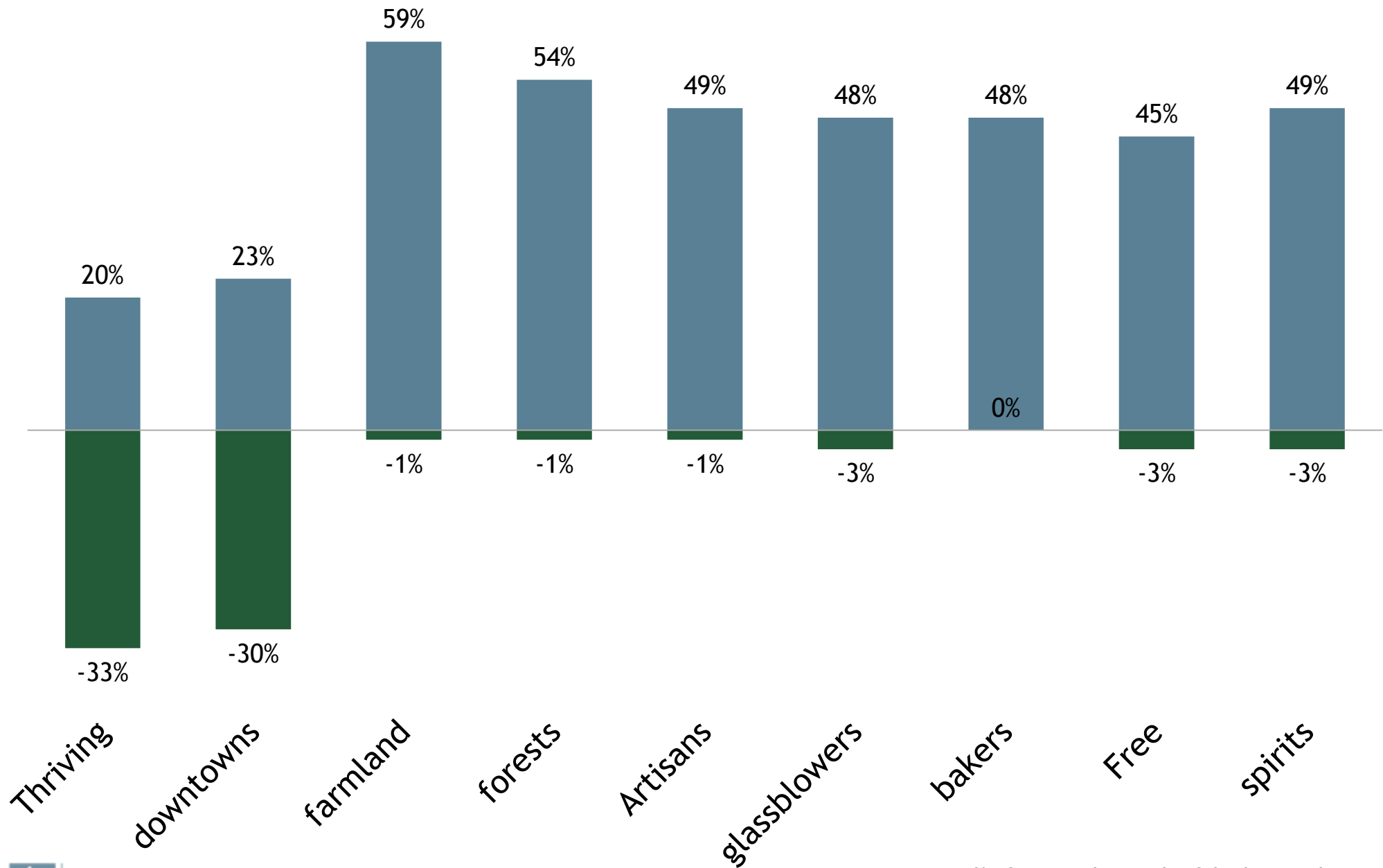
Phrase Relevance – Summer Manifesto 3: MA



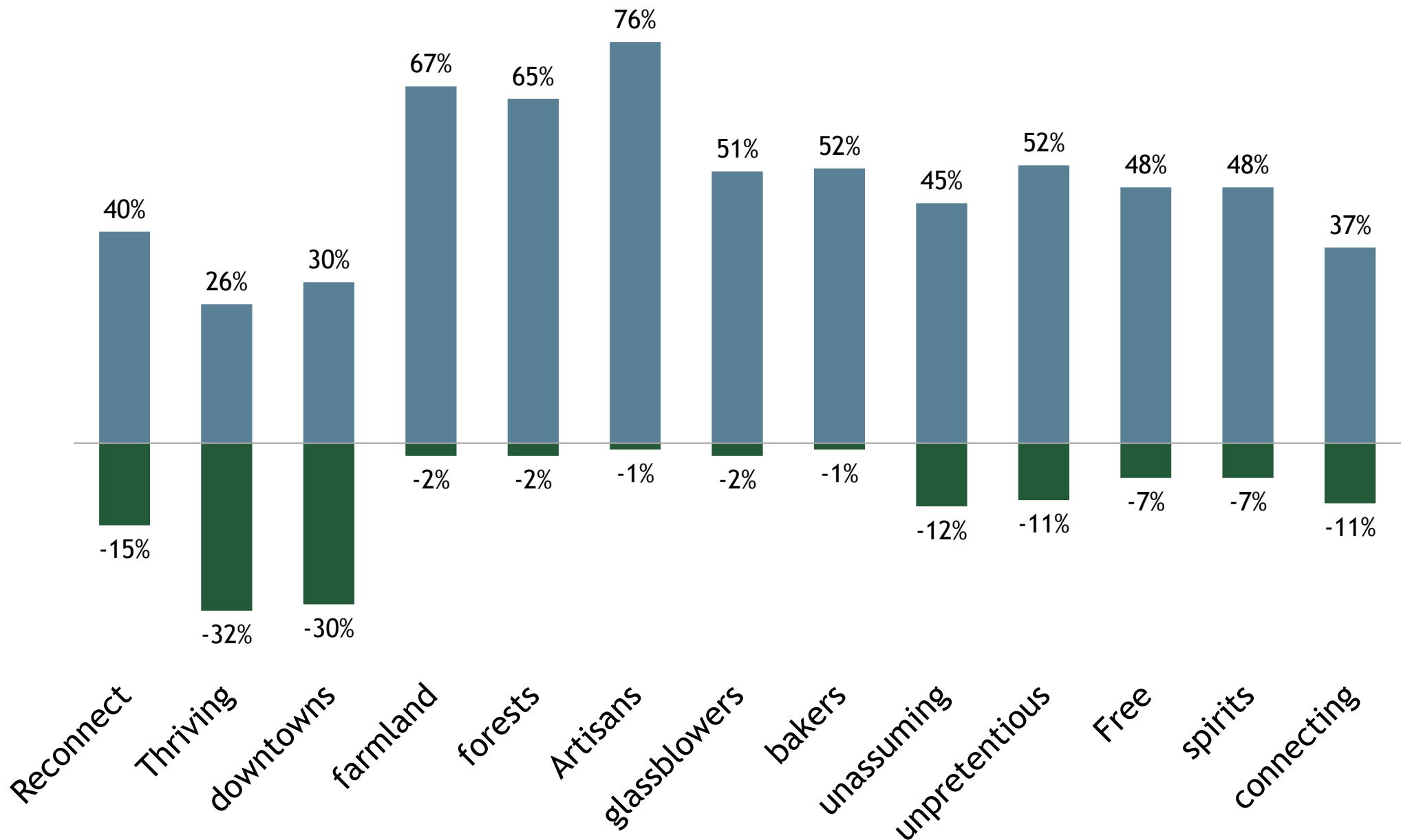
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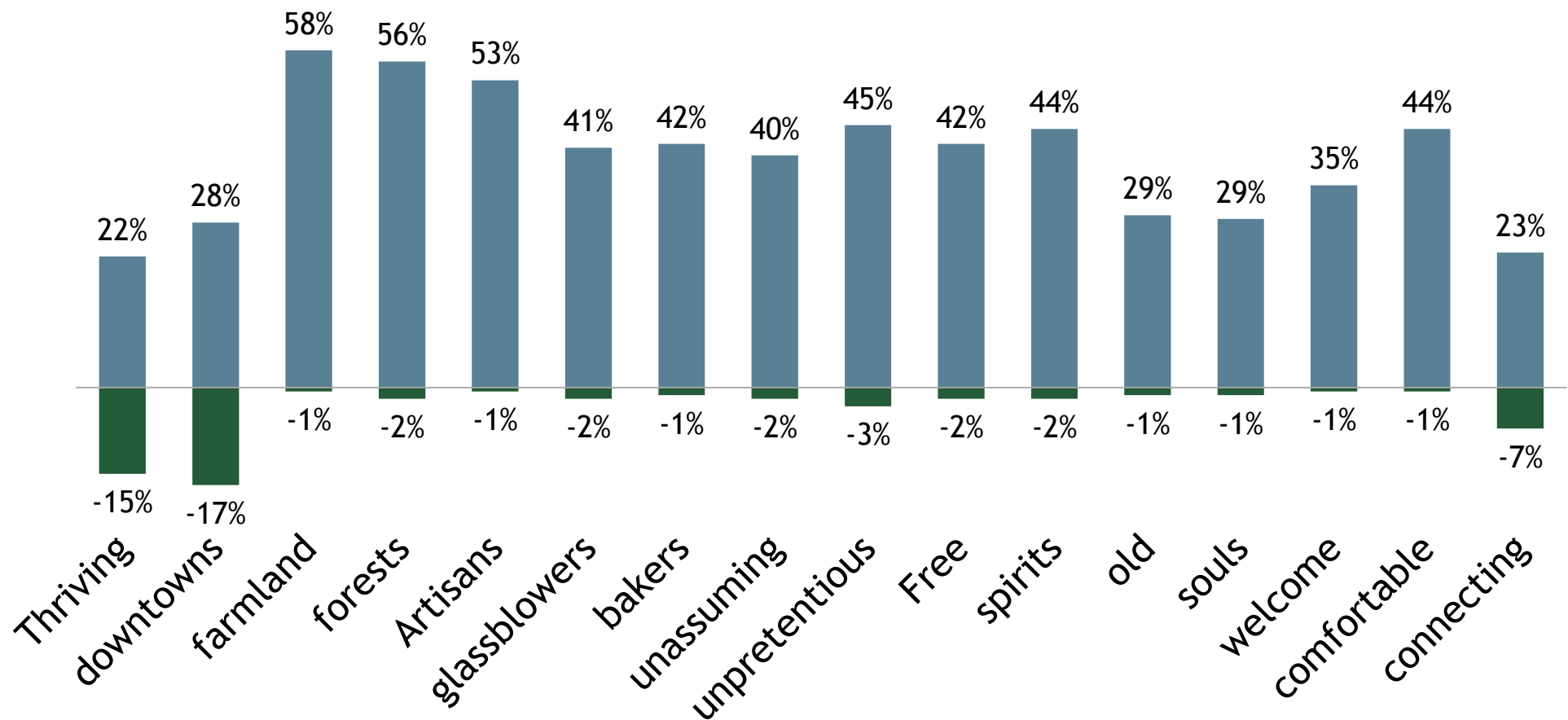
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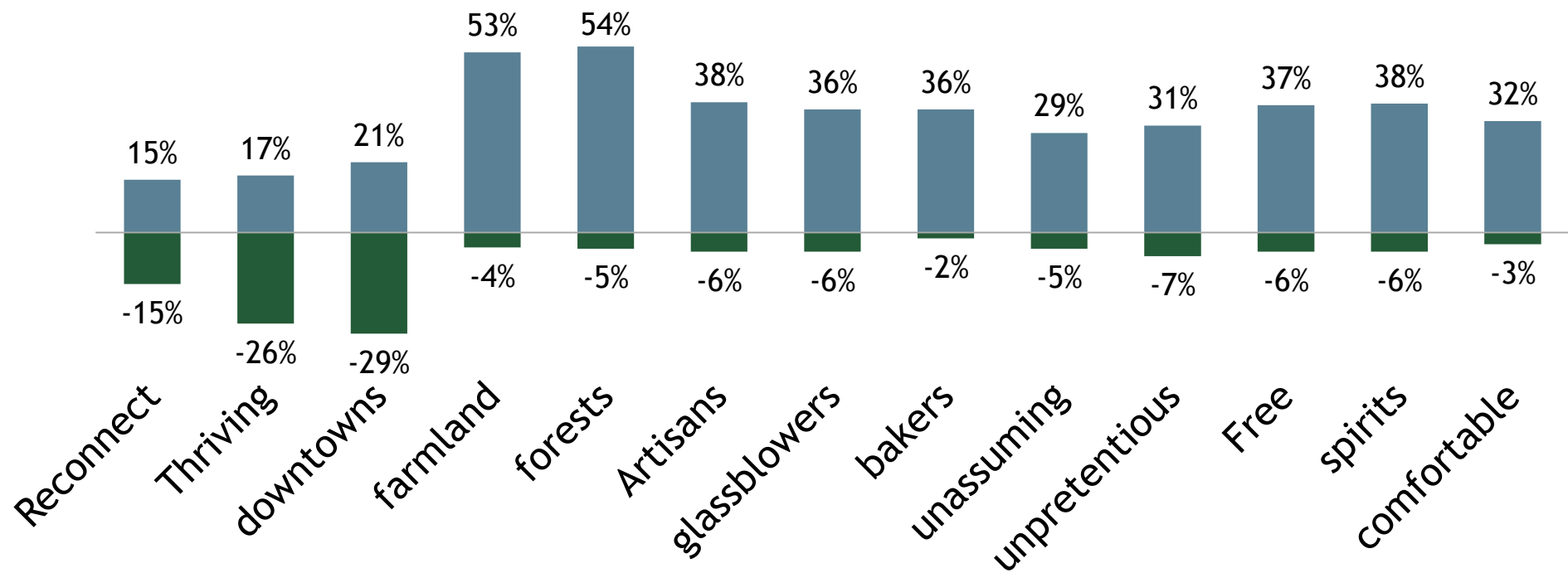
Phrase Relevance – Summer Manifesto 3: Provider



Phrase Relevance – Summer Manifesto 3: VT Vacation



Phrase Relevance – Summer Manifesto 3: Non-VT Vacation

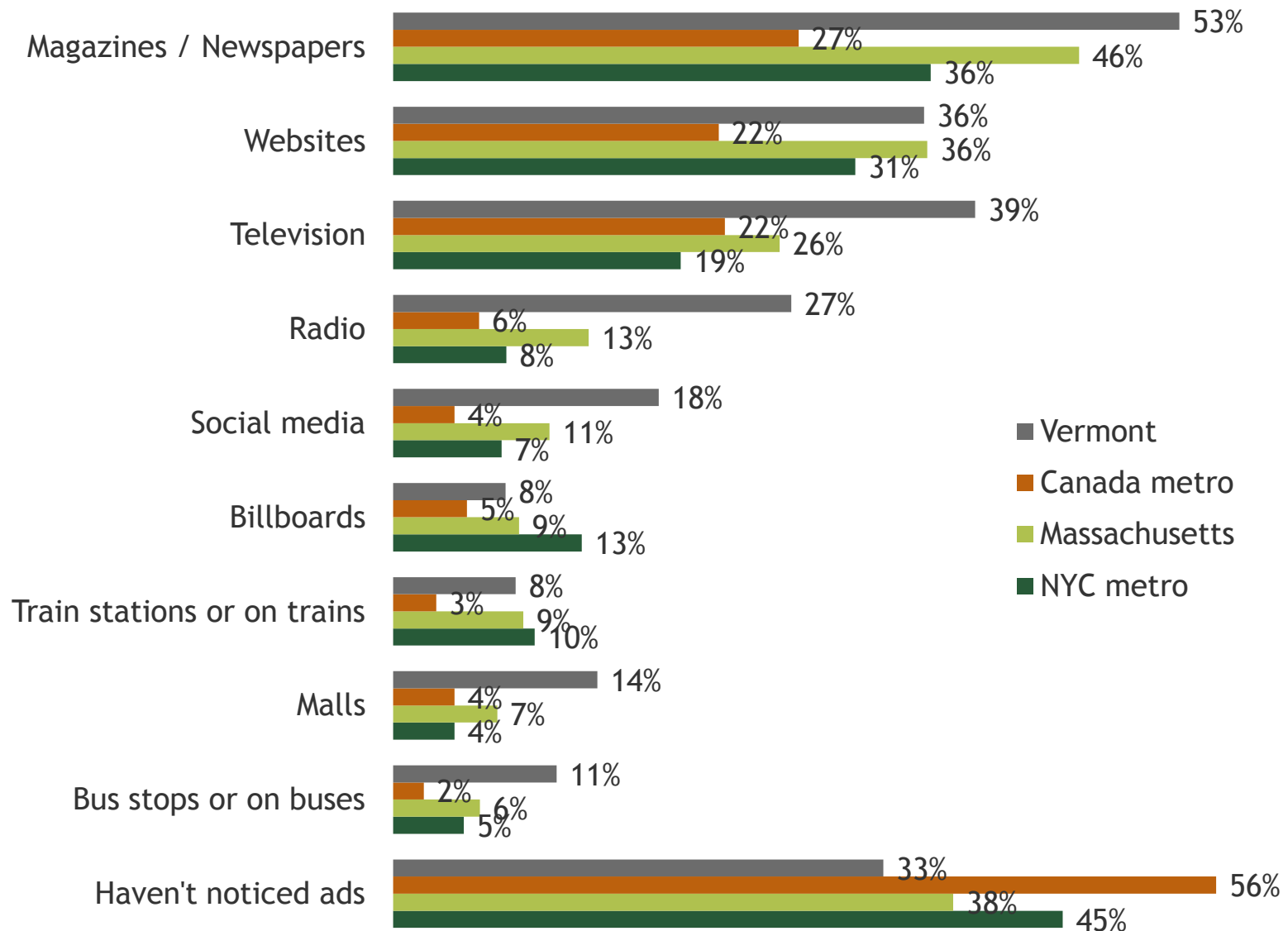


Appendix

- Respondent Profiles
- Vacation Profiles
- Attribute Importance
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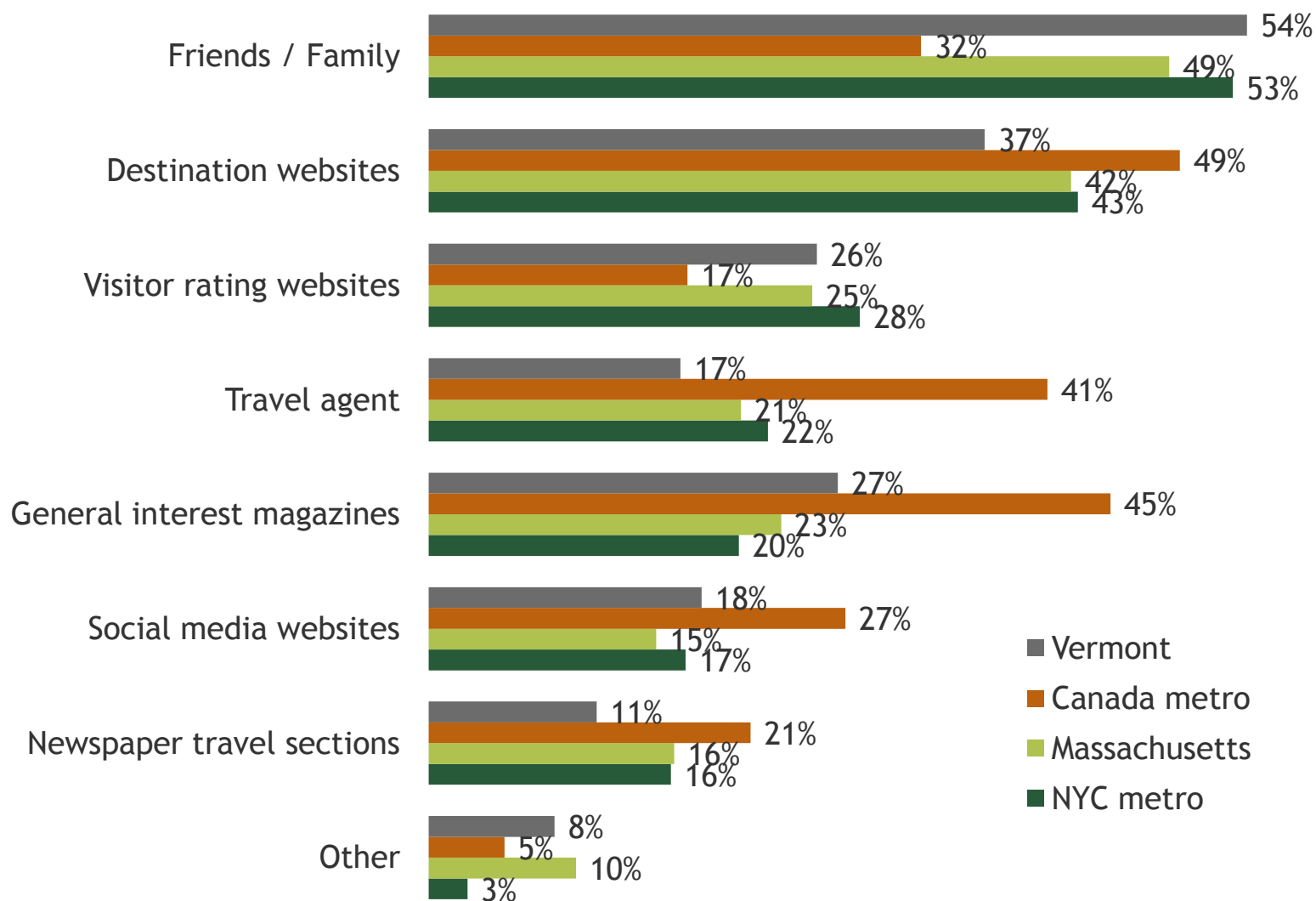
Awareness of Vermont Advertising

Those that have noticed advertisements for Vermont, are most likely to remember ads in magazines or newspapers, Vermonters are most aware followed by Massachusetts, then NYC metro then Canada metro.



Vacation Planning Sources by Market

Canadians are much less likely than Americans to go to family and friends for vacation planning information but are more likely to go to travel agent, general interest magazines and social media.



* There were no significant differences across markets for the following sources: travel magazines, printed brochures or guidebooks from a destination state, commercial travel websites, travel guidebooks