

H2R Market Research

Reveal Your Customer's Full Experience

Connecticut Office of Tourism 2017 Brand Awareness Research

Delivered February 2018

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Methodology

- The 2017 Brand Awareness Study was conducted in January 2018 among residents living in advertised markets (the states of Connecticut, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island and Vermont). Respondents were screened to ensure they were 18 years of age or older, decision makers in their household, and traveled for leisure in the past 12 months. Among this sample, a subset of travelers who are 25-65 years of age with a household income of \$75k+ have been segmented out as a target market throughout this report.
- The sample for this study included the following: Connecticut (291n), Massachusetts (301n), New Hampshire (280n), New Jersey (278n), New York (288n), Pennsylvania (347n), Rhode Island (256n) and Vermont (161n). Results from each market were then weighted commensurate with household population as has been done in the past to provide an overall weighted average reflective of the aggregate travel population across these advertised markets.



Executive Summary

Overview

- The purpose of the 2017 Brand Awareness Research is to measure the State of Connecticut's level of brand awareness, travelers' intent to visit and the degree to which travelers in the advertised markets took positive actions as a result of seeing/reading Connecticut Office of Tourism's (COT) marketing communications. Additionally, this study evaluated the campaign's market reach and the incremental impact Connecticut's marketing communications efforts had upon conversion, and how Connecticut's travel brand is perceived in the market place.

▪ Aided Brand Awareness (Overall)	60%	+ 2 points
▪ Aided Brand Awareness (Target)	62%	- 2 points
▪ Target Market's Interest in Visiting	37%	- 6 points
▪ Positive Actions among Ad Aware	66%	+ 2 points
▪ Market Reach	3.58M	+ 0.34k
▪ Incremental Conversion	+8.2%	+ 0.4 points



COT's Key Performance Indicators

- Among overall travelers across New England, Connecticut's aided brand awareness as a travel destination improved by 2 points to reach 60% this past year. However, brand awareness among those in Connecticut's target market* (which averaged 62%) slipped by 2 points.
- The target market's interest in visiting Connecticut (37%) fell 6 points this year from 43% recorded in 2016. Interestingly, however, when asked as *intent* to visit (45%) in an A/B split rather than as interest in visiting (37%), the ratio increased by 8 percentage points.
- And, 66% of ad aware travelers indicated the marketing communications caused them to consciously take positive actions along their path to purchase, up 2 points over the 64% recorded last year. Likewise, the campaign delivered a larger ratio of incremental conversion (+0.4 points) than it did in 2016.

**Target market travelers live in the advertised markets and are 25-65 years old with a household income of \$75k+.*



Market Potential Includes Half

- Connecticut's share of target market travelers who have visited the state over the past five years ranked 5th out of the 8 Northeastern states evaluated – up 2 spots from 2016. Among all travelers, Connecticut continues to rank 5th in visitation ahead of Rhode Island, Vermont and New Hampshire.
- Market Potential, a new measure added this year, indicates that 54% of overall travelers across New England and 57% of travelers in the target market are either a Connecticut Considerer, Lapsed Visitor or Recent Visitor*. These are among the travelers most likely to visit Connecticut in the future, and to react favorably to marketing communications.

**Considerers are travelers who have considered visiting Connecticut, but have not yet done so. Lapsed Visitors are travelers who have visited Connecticut, but not in the past 5 years; and Recent Visitors are travelers who have visited Connecticut in the past 5 years.*



Connecticut Earns Strong Retention

- Over the past five years Connecticut has done a good job converting brand aware travelers into visitors to the state. Connecticut has converted 73% of total brand aware travelers into visitors and 74% of brand aware travelers in the target market. Against competitors, Connecticut does an even better job retaining the visitors it hosts. Connecticut's retention rate is one of the highest among the competitive set averaging 78% across the target market and 73% overall. This is topped only by New York, Pennsylvania and New Jersey among both segments of travelers.
- Connecticut's Visitor Growth Index* (VGI) averaged 168 overall, indicating that the state's potential runs more than 2:1 the level of visitation it has generated in recent years; although, this isn't quite as high as the competitive set (183). Potential among the target market is a bit lower at 169—compared to this same segment among the competitive set (167).

**VGI is a concept introduced by McKinsey & Company that measures a brand's upside by comparing its market potential to its current level of patronage.*



Marketing Awareness Lifts Brand Ratings

- On average, travelers from the target market reached by Connecticut's marketing communications generated a much higher average brand asset ratings (+16 points) for Connecticut than those who had not seen/read any marketing messages about Connecticut.
- These aware travelers were much more likely to describe Connecticut using positive terms such as *Exciting* and *Fun* (+17 points and +18 points, respectively). And, are also much more likely to say that Connecticut is a "Great place to spend time with my friends" (+25 points), "Has lots to see and do" (+22 points) and is a "Great place to spend time with children" (+20 points).
- Connecticut's primary target market, which includes slightly younger and more affluent travelers, saw a few notable increases this year. This year, target market travelers were more likely to describe Connecticut as Welcoming, Friendly and Cultural (+2 points each).



Marketing Delivers Positive Results

- The COT marketing message reached 20% of traveler households in the Northeast resulting in a market reach of 3.58 million traveler households. This represents an 11% increase (+340k) over the market reach in 2016.
- The COT spent nearly \$300k more in advertising for the 2017 calendar year vs. the calendar year 2016. However, with the increase in market reach, the cost per aware household increased only slightly (+\$0.02), providing for a comparatively efficient marketing campaign.
- Furthermore, those reached by the COT marketing message were 8.2 points more likely to visit Connecticut than their unaware counterparts. Weighted across aware traveler households in the Northeast, it is projected that this year's marketing communications campaign generated 292k incremental trips for the State of Connecticut.



Marketing Message Takeaways

- Marketing aware travelers in the target market (those who indicated they saw or heard any marketing for Connecticut in 2017) were more likely to say the messages they read were consistent with the state's travel brand (+4 points), revealed something new about the State of Connecticut (+4 points) and improved their opinion of the state as a destination (+10 points).
- Likewise, 16% of target market travelers' familiar with the COT marketing communications say they plan to visit Connecticut as a result of seeing/hearing a marketing message—compared to only 10% who had not seen/read any COT marketing communications.
- In fact, those in the target market who were aware of the marketing messages were 28 points more likely (on average) to take positive action towards planning a trip or learning more about Connecticut.



Key Performance Indicators

01

Key Performance Indicators



Overall Aided Brand
Awareness (60%)
Up 2 Points



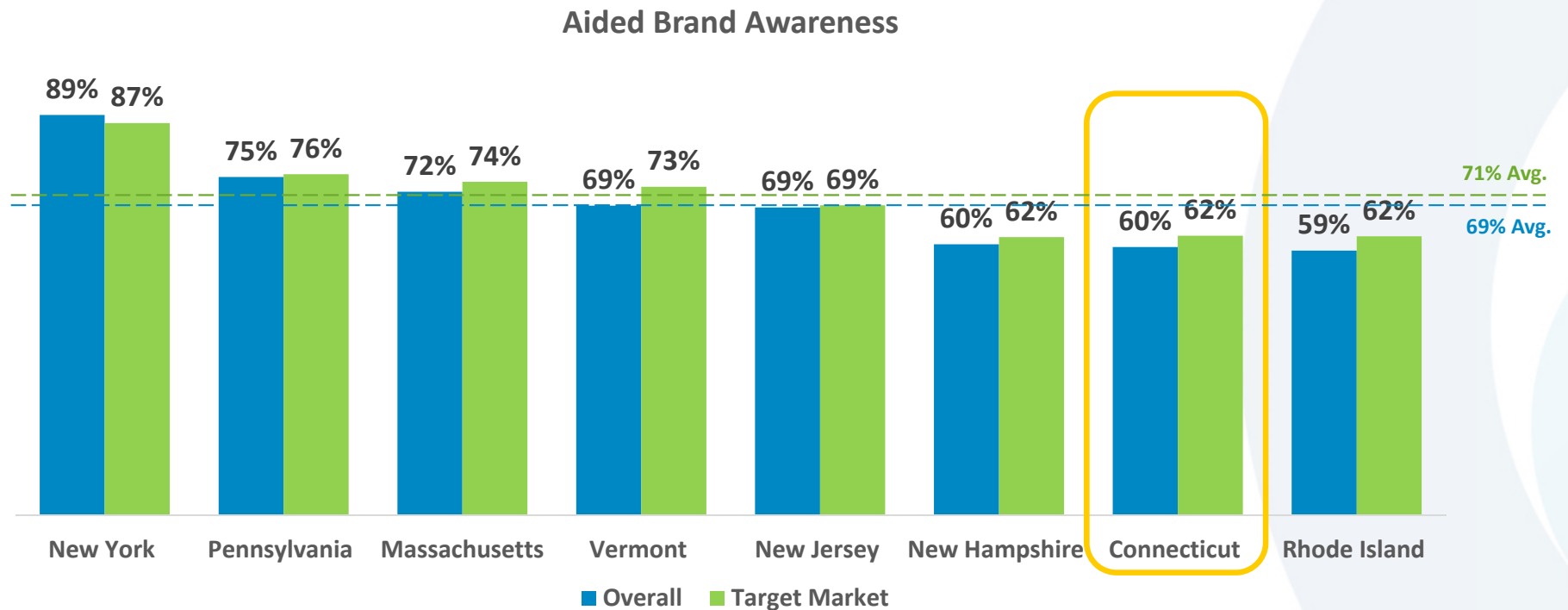
Target Market's* Interest in
Visiting Connecticut (37%)
Down 6 points



Ad Aware Travelers Taking
Positive Action (66%)
Up 2 points

**Target market travelers live in the advertised markets and are 25-65 years old with a household income of \$75k+.*

Aided Connecticut brand awareness among those in the target market runs slightly higher than it does among the overall travelers.

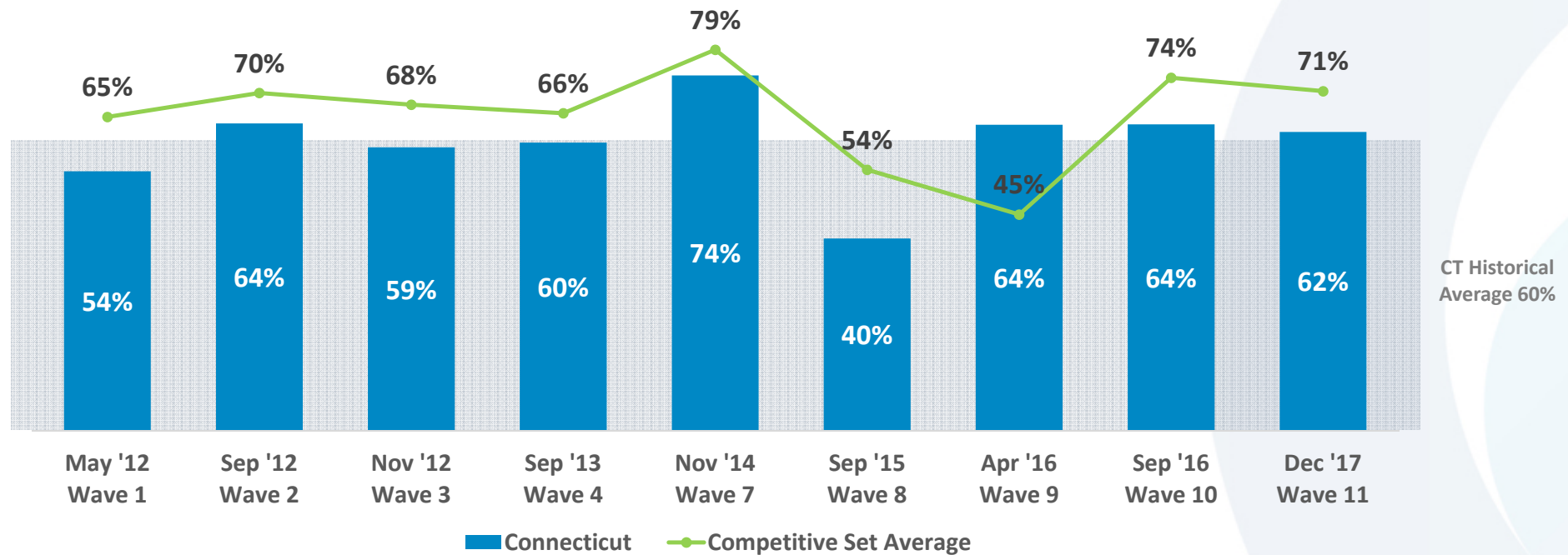


Q9: And, even if you just mentioned any of these states, which of the following STATES have you ever heard about as a place to visit or travel to? Select all that apply.

RESPONDENT BASE: OVERALL RESPONDENTS | N=2,202 14
TARGET MARKET RESPONDENTS | N=846

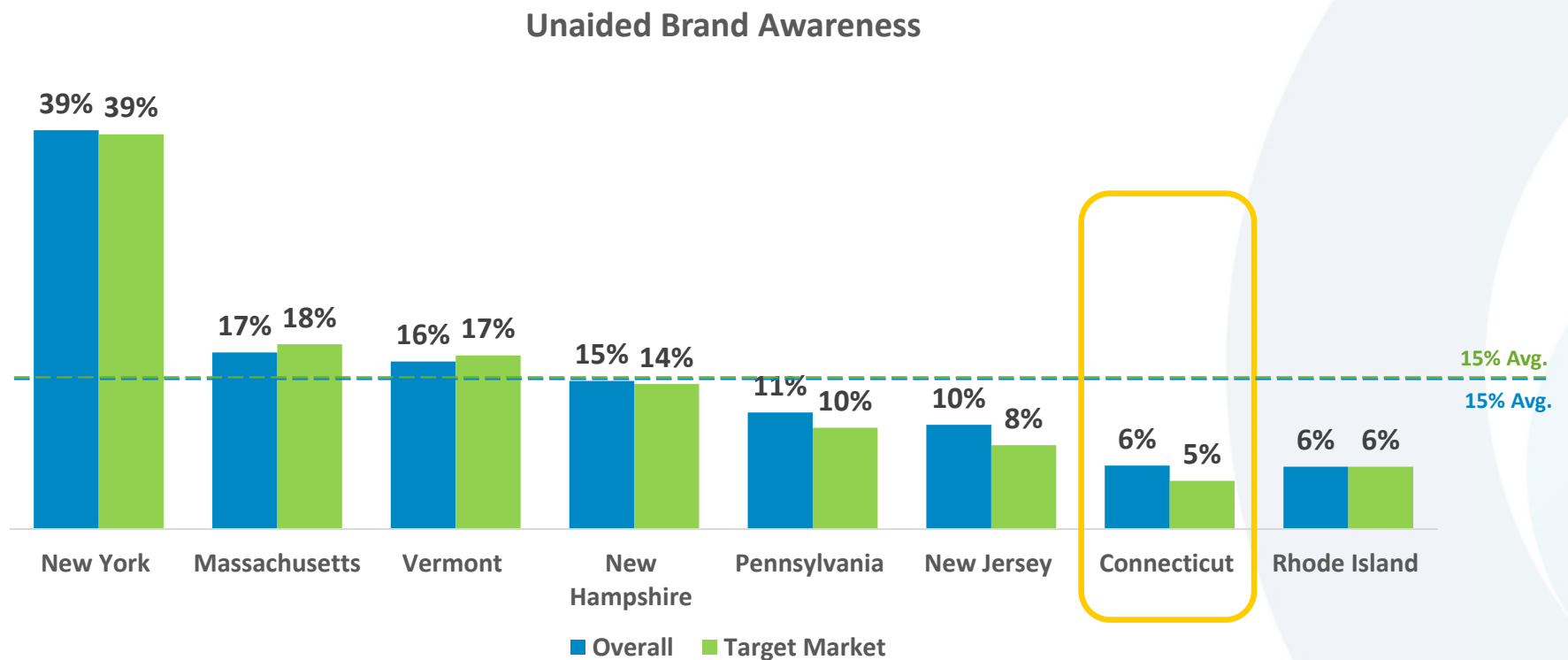
While Connecticut's aided brand awareness increased 2 points overall, it fell 2 points among the target market, and interest remains below the competitive set.

Aided Brand Awareness – Target Market Trend



Q9: And, even if you just mentioned any of these states, which of the following STATES have you ever heard about as a place to visit or travel to? Select all that apply.

Fewer than 1 in 10 travelers exhibit unaided brand awareness of Connecticut as a place to visit.

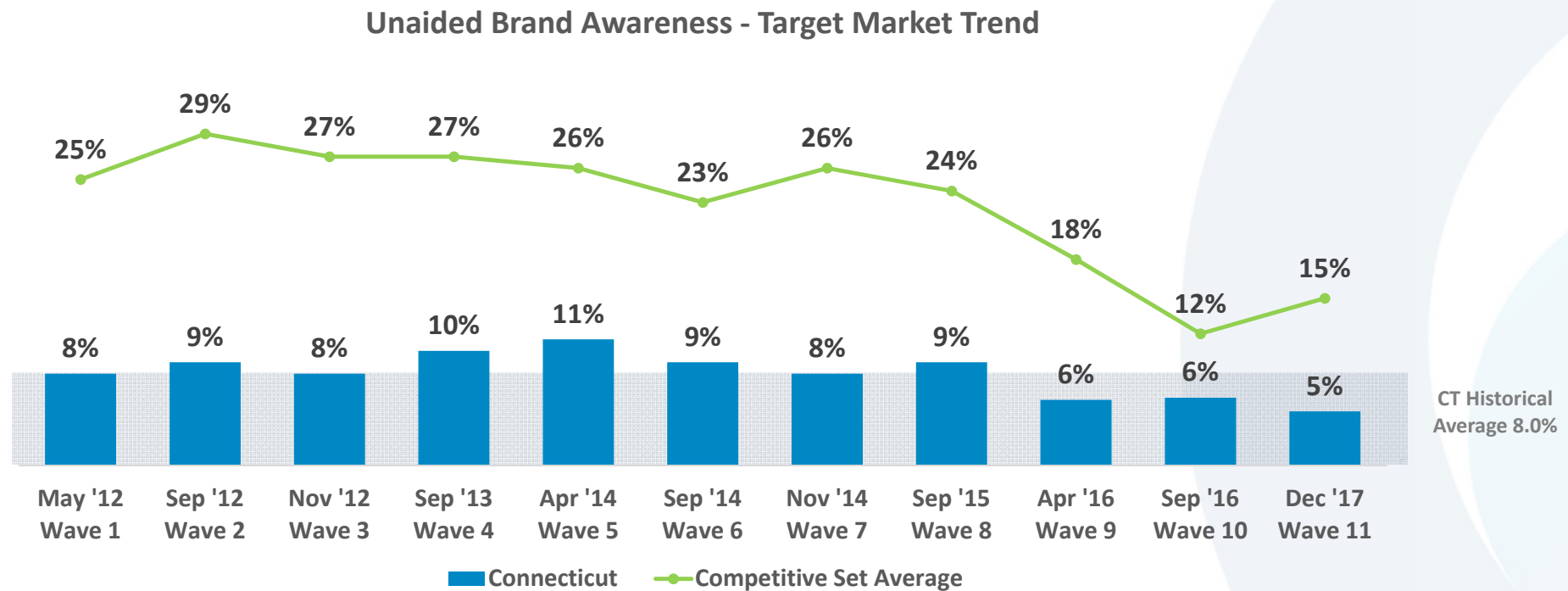


Q7: When you think about places to visit or travel to, please type the first STATE that comes to mind in the space below.

Q8: And, what other STATES do you think of as places to visit or travel to?

RESPONDENT BASE: OVERALL RESPONDENTS | N=2,202 16
TARGET MARKET RESPONDENTS | N=846

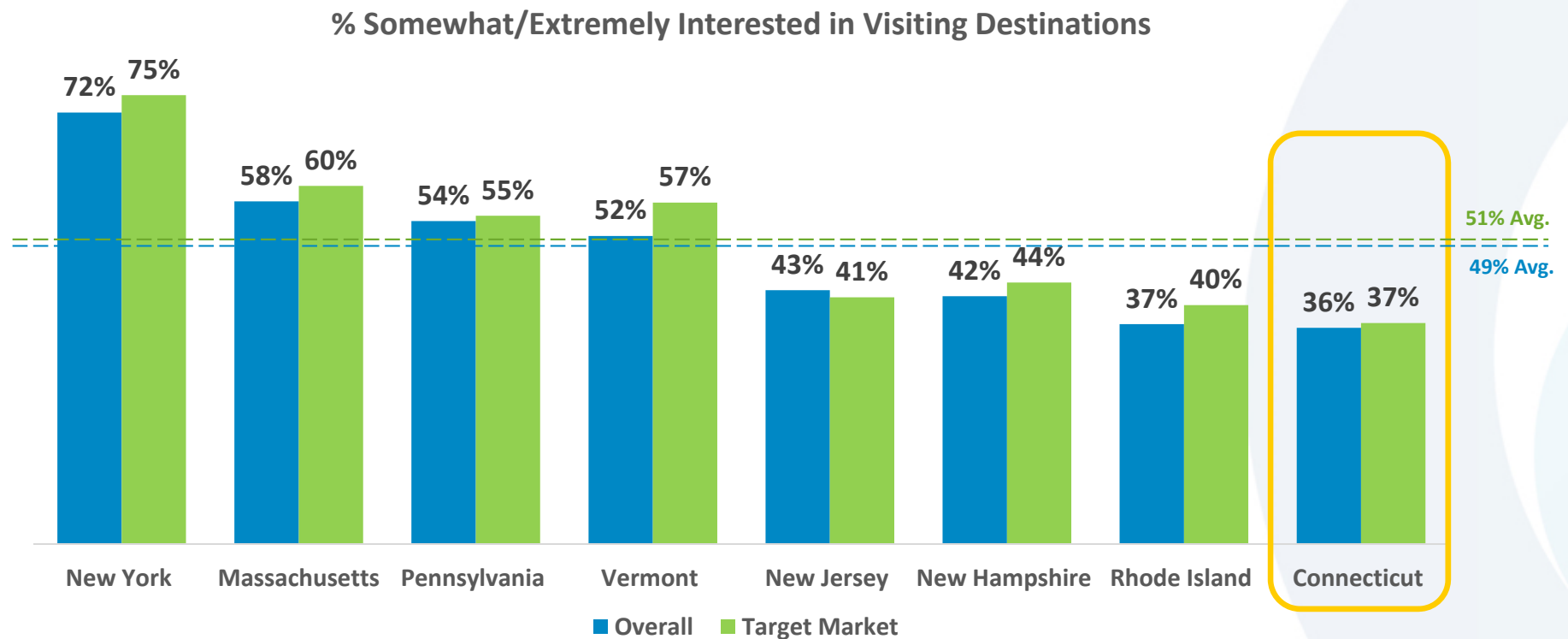
Unaided brand awareness among the target market slipped slightly in 2017, while awareness of others in the competitive set increased by an average of 3 percentage points this past year.



Q7: When you think about places to visit or travel to, please type the first STATE that comes to mind in the space below.

Q8: And, what other STATES do you think of as places to visit or travel to?

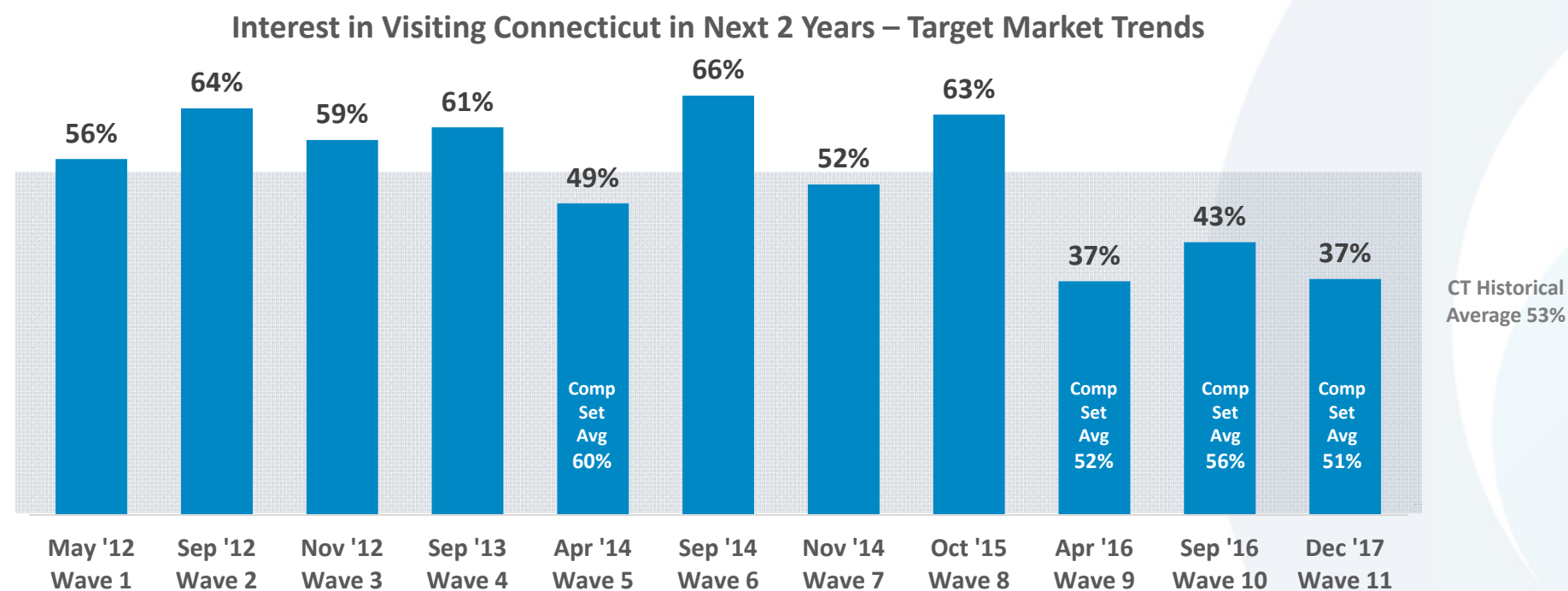
Interest in visiting Connecticut is understandably a bit higher among those in the target market than it is among overall travelers.



Q15a: How interested would you say you are in visiting each of the following destinations for a Northeast getaway during the next two years? Please use a scale from 1 to 5 where 1 is "not interested at all" and 5 is "extremely interested."

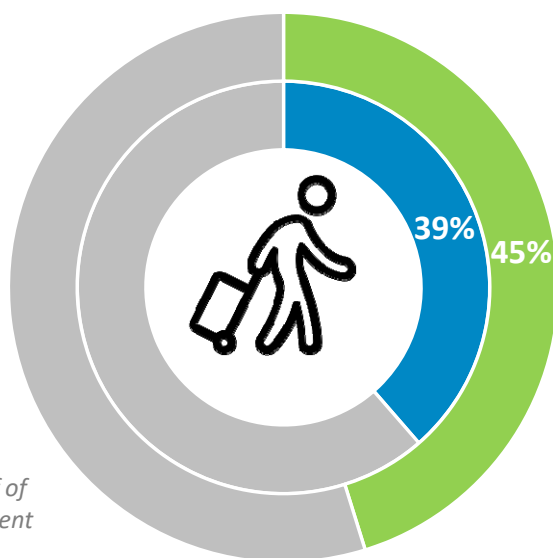
RESPONDENT BASE: OVERALL RESPONDENTS | N=2,202 18
TARGET MARKET RESPONDENTS | N=846

Among the target market, interest in visiting declined by 6 points this past year and remains below Connecticut’s historical average as well as the competitive set.



“Intent” to visit Connecticut runs much higher than “Interest” in visiting Connecticut. Among the target market, “intent” yields results that are 8 points higher than “interest” (45% vs 37%).

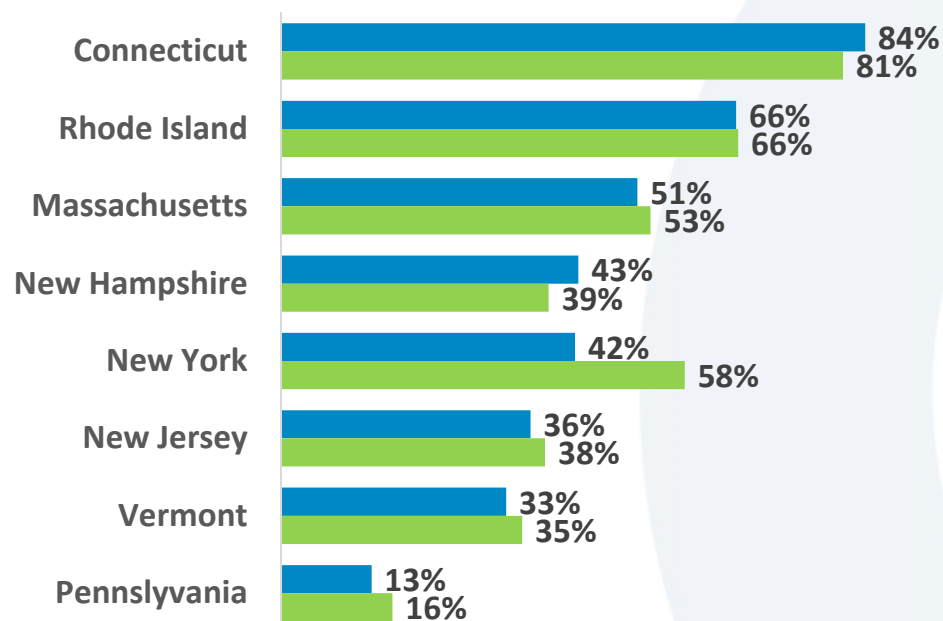
% Probably/Definitely Will Visit



In an A/B split, half of travelers rated “Intent to Visit” while the other half rated “Interest in Visiting.”

■ Overall ■ Target Market

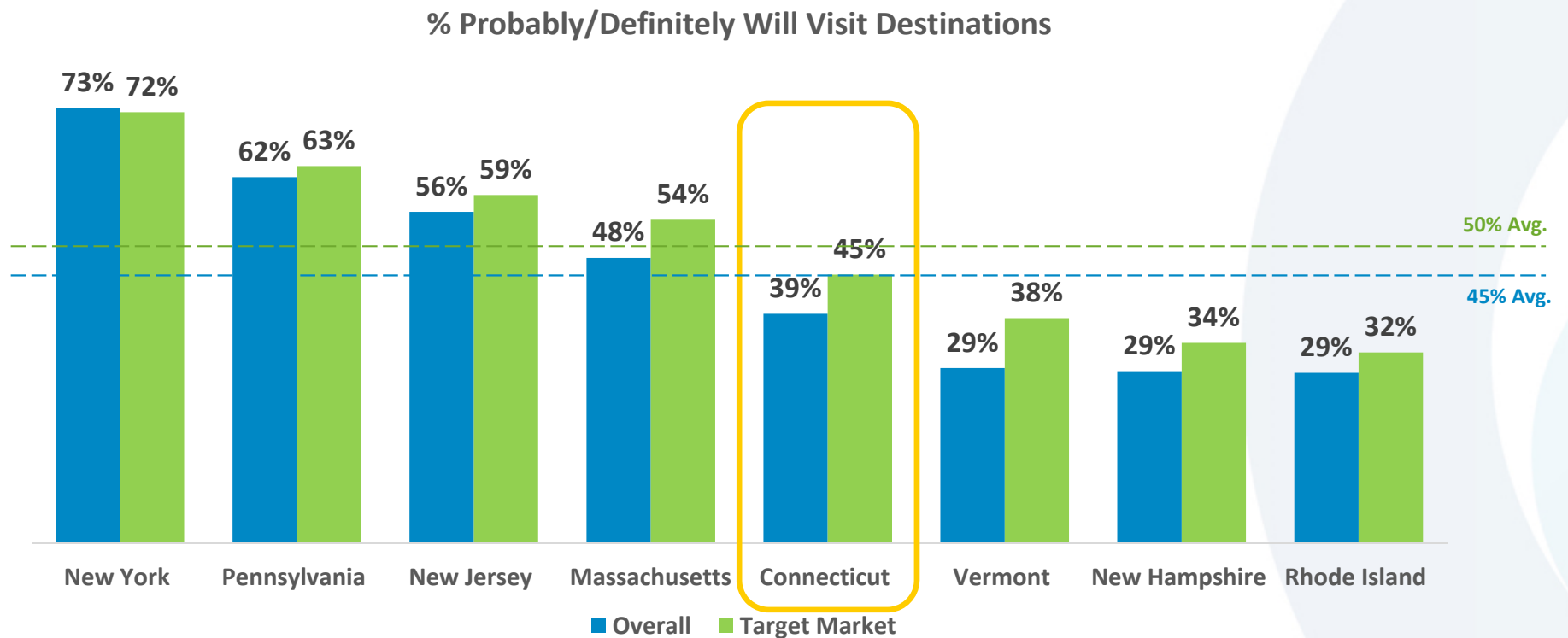
% Probably/Definitely Will Visit – By Market



Q15b: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months. (5-pt. scale)

RESPONDENT BASE: OVERALL RESPONDENTS | N=2,202
TARGET MARKET RESPONDENTS | N=846

Intent to visit Connecticut ranked near the middle of the competitive set, with target market travelers exhibiting a much higher intent.

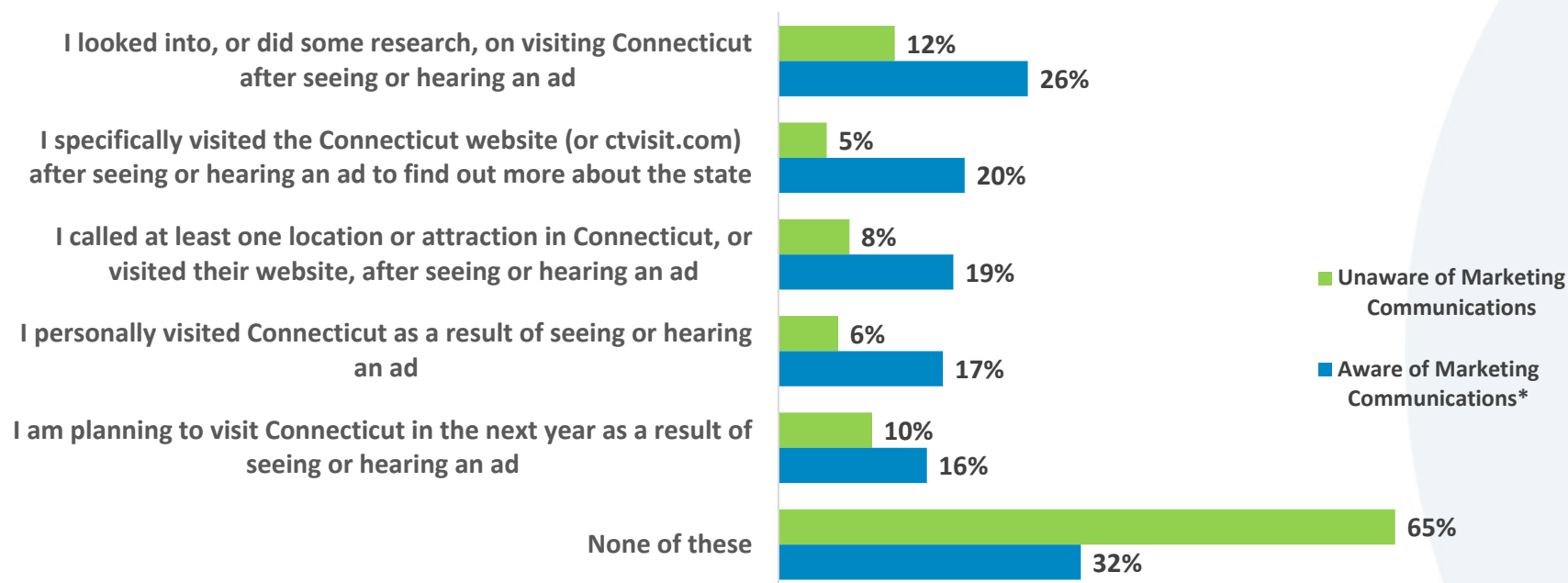


Q15b: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months. (5-pt. scale)

RESPONDENT BASE: OVERALL RESPONDENTS | N=2,202
TARGET MARKET RESPONDENTS | N=846

Travelers in the target market who were reached by Connecticut's marketing messages were much more likely to take positive action (68%) than travelers who were not familiar with the COT marketing efforts (35%).

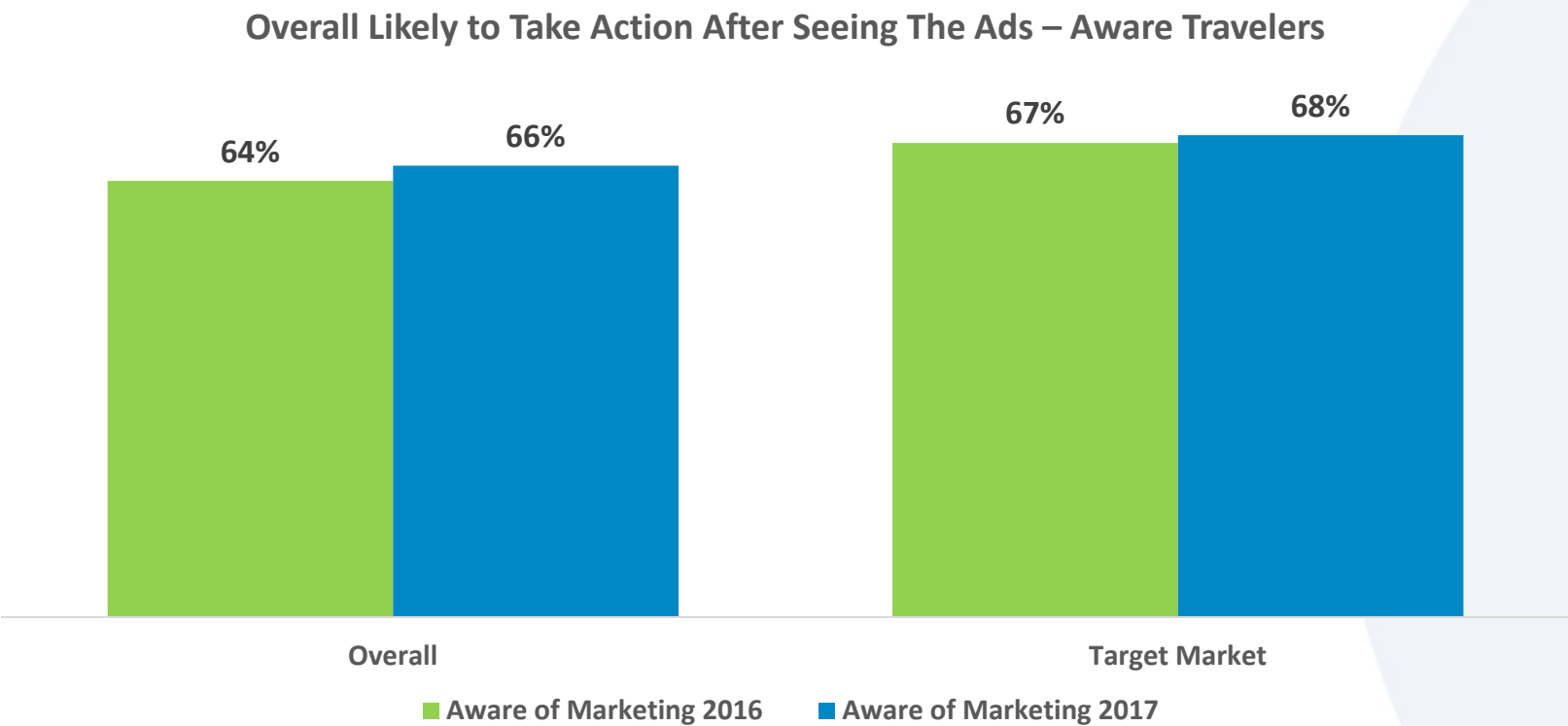
Actions Likely to Take After Seeing The Ads



**Aware travelers are those who selected Connecticut in Q13 – "...please indicate which of these STATES you have seen, heard or read any marketing communications including online news stories, social postings, advertisements or online searches in 2017."*

Q35: Which of these statements, if any, apply to you after seeing, hearing or reading any type of advertising message or news story for Connecticut in 2017? Select all that apply.

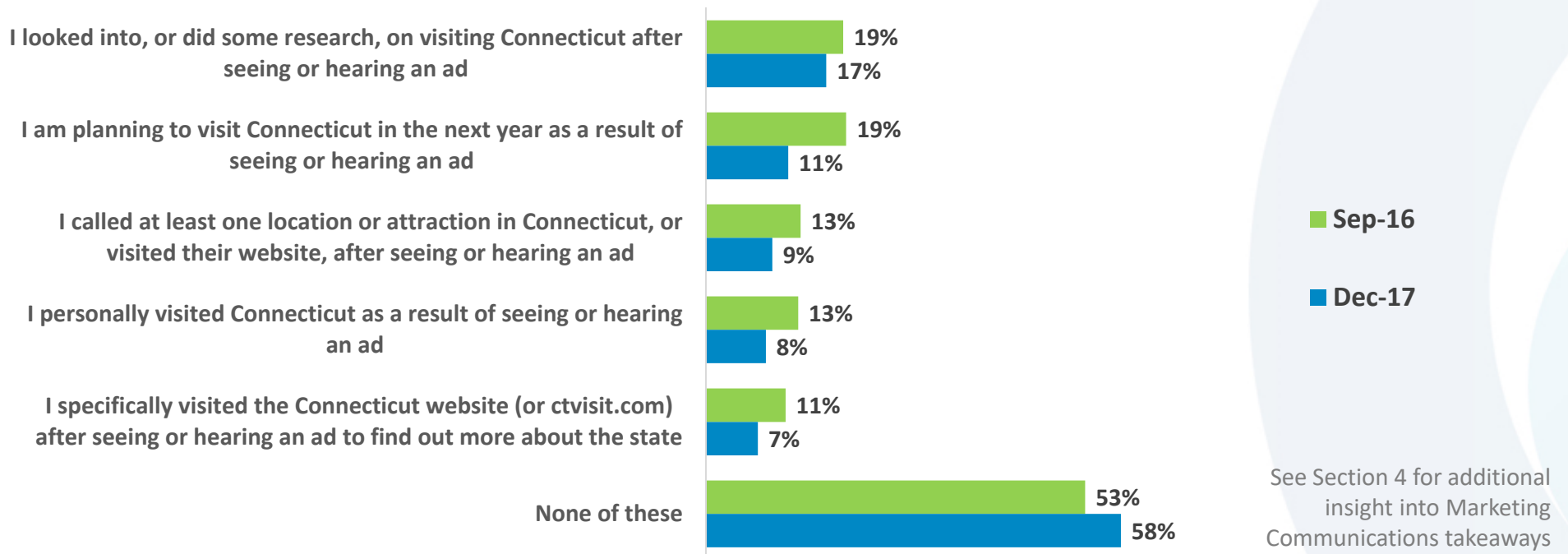
Ad aware travelers, both overall and those in the target market, were more likely to take positive action this year than they were in 2016.



Q35: Which of these statements, if any, apply to you after seeing, hearing or reading any type of advertising message or news story for Connecticut in 2017? Select all that apply.

Overall, however, the ratio of those in the target market (aware or unaware) taking any positive action slipped 5 points—falling from 47% in 2016 to 42% this year.

Positive Actions Taken by Travelers as Result of Seeing Marketing



Q35: Which of these statements, if any, apply to you after seeing, hearing or reading any type of advertising message or news story for Connecticut in 2017? Select all that apply.

Brand Health Measurements

02

Brand Health KPIs



The **market potential** for future visitation includes **54%** of travelers in the advertised markets



73% of travelers who are familiar with CT have **converted to visitors** in the past 5 years



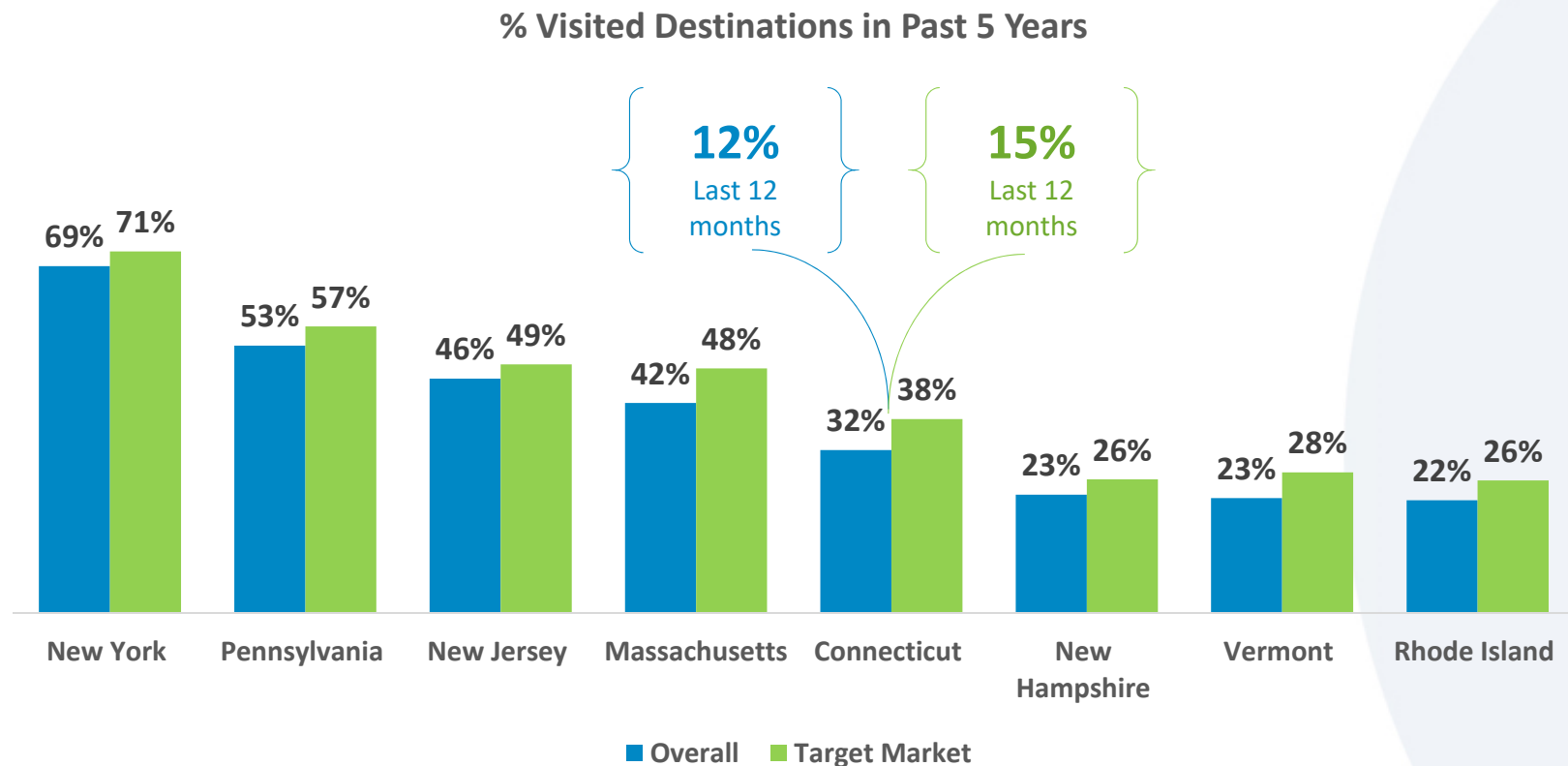
In the past 12 months, CT has **retained 68%** of its past visitors



Connecticut has a Visitor Growth Index* of **215** overall and **167** among the target market

**Visitor Growth Index (VGI) is a tool that measures a destination's market potential relative to its current market share.*

Connecticut's share of visitation in the past 5 years reached nearly one-third of travelers, including nearly 4 in 10 of those in the target market.

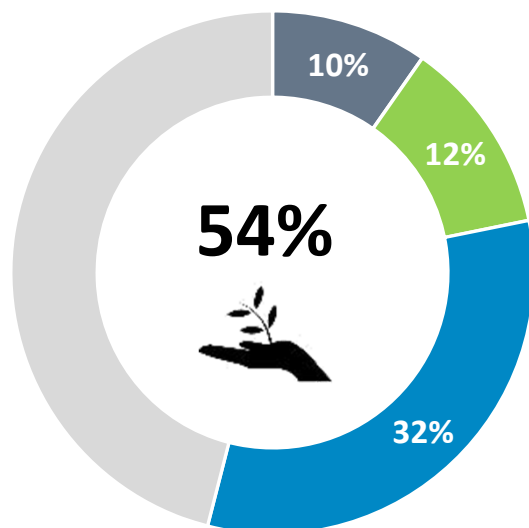


Q10: Using the scale provided, please indicate which of the following destinations have you visited for a getaway in the last five years? (5-pt. scale)

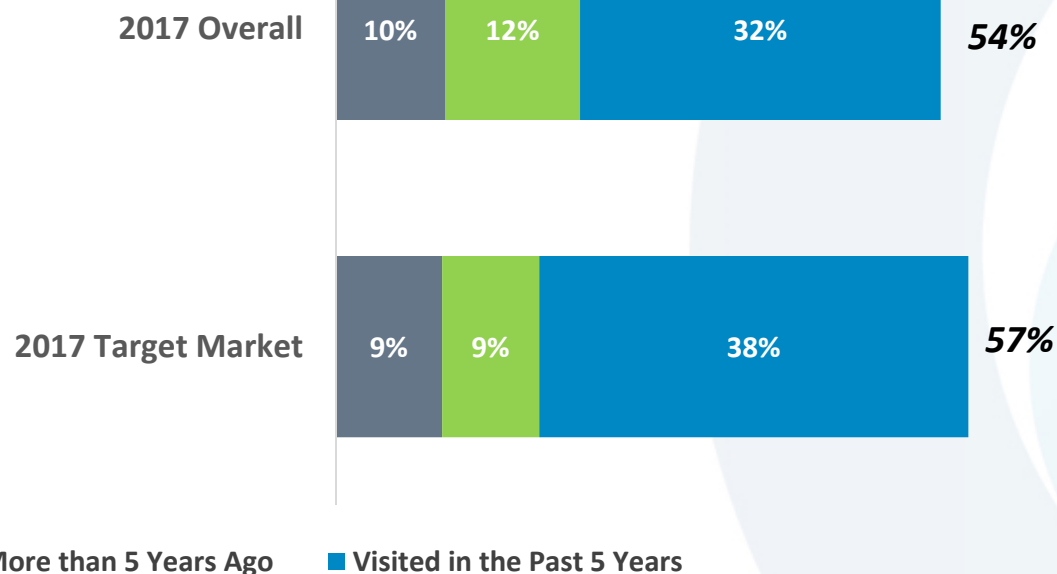
RESPONDENT BASE: OVERALL RESPONDENTS | N=2,202
TARGET MARKET RESPONDENTS | N=846

Connecticut's market potential includes 54% of overall travelers across New England, and 57% of travelers in the target market.

Connecticut Overall Market Potential



Market Potential by Segment

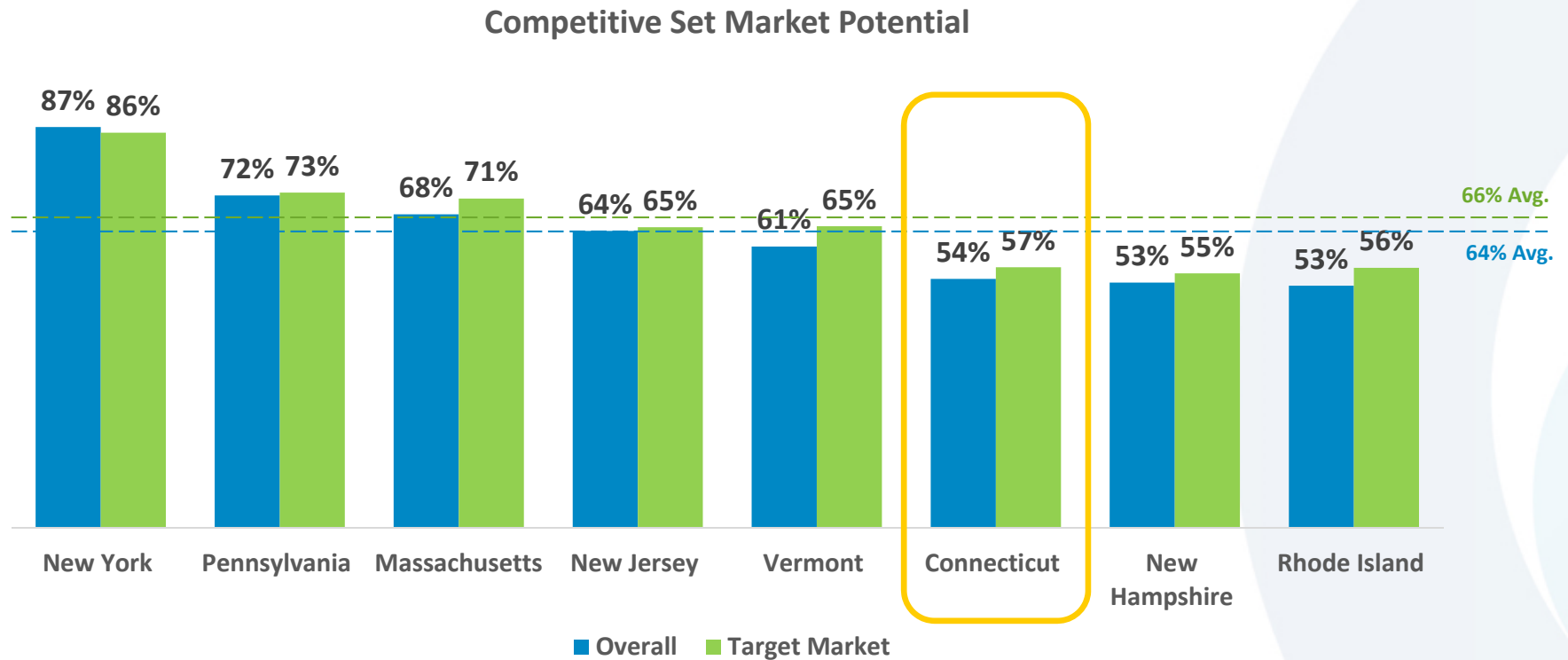


■ Considered Visiting ■ Visited More than 5 Years Ago ■ Visited in the Past 5 Years

Q10: Using the scale provided, please indicate which of the following destinations have you visited for a getaway in the last five years? (5-pt. scale)

RESPONDENT BASE: OVERALL RESPONDENTS | N=2,202
TARGET MARKET RESPONDENTS | N=846

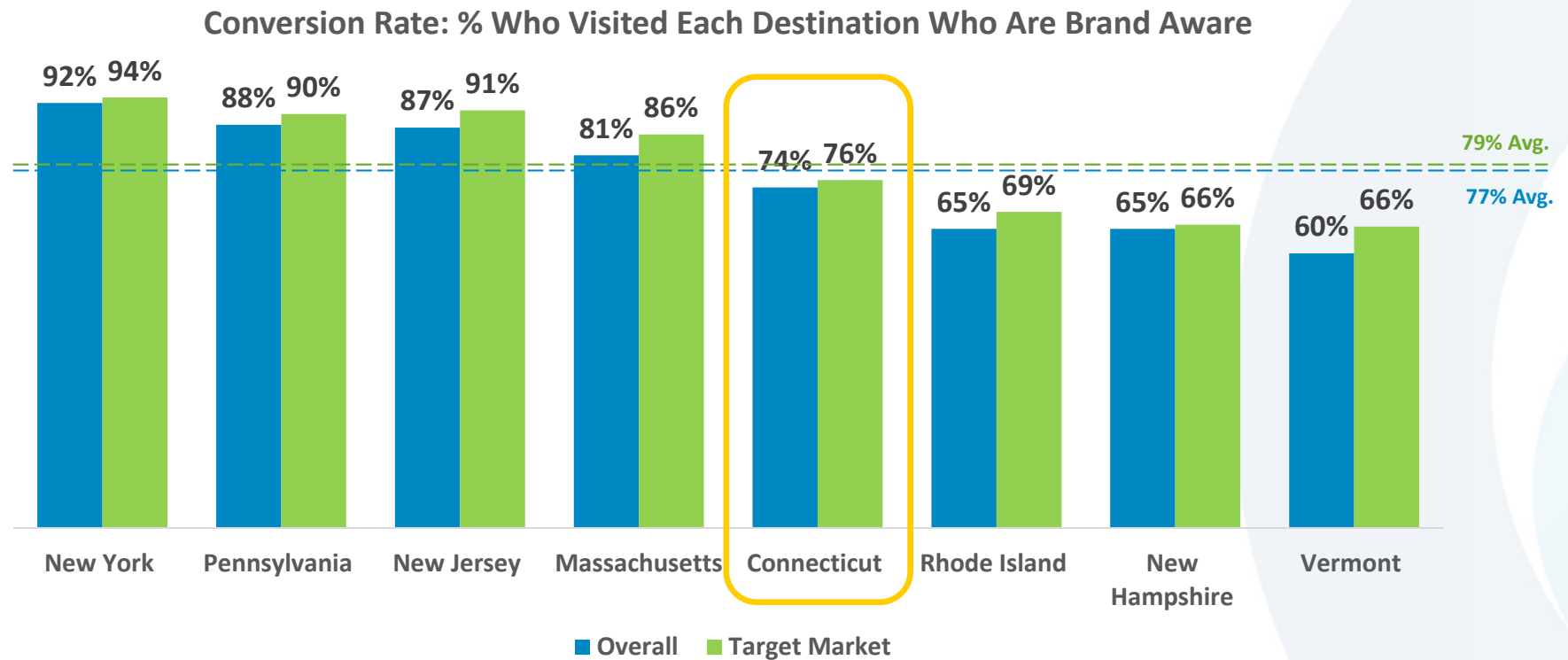
Similar to its level of visitation, Connecticut's market potential is on par with both New Hampshire and Rhode Island.



Q10: Using the scale provided, please indicate which of the following destinations have you visited for a getaway in the last five years? (5-pt. scale)

RESPONDENT BASE: OVERALL RESPONDENTS | N=2,202
TARGET MARKET RESPONDENTS | N=846

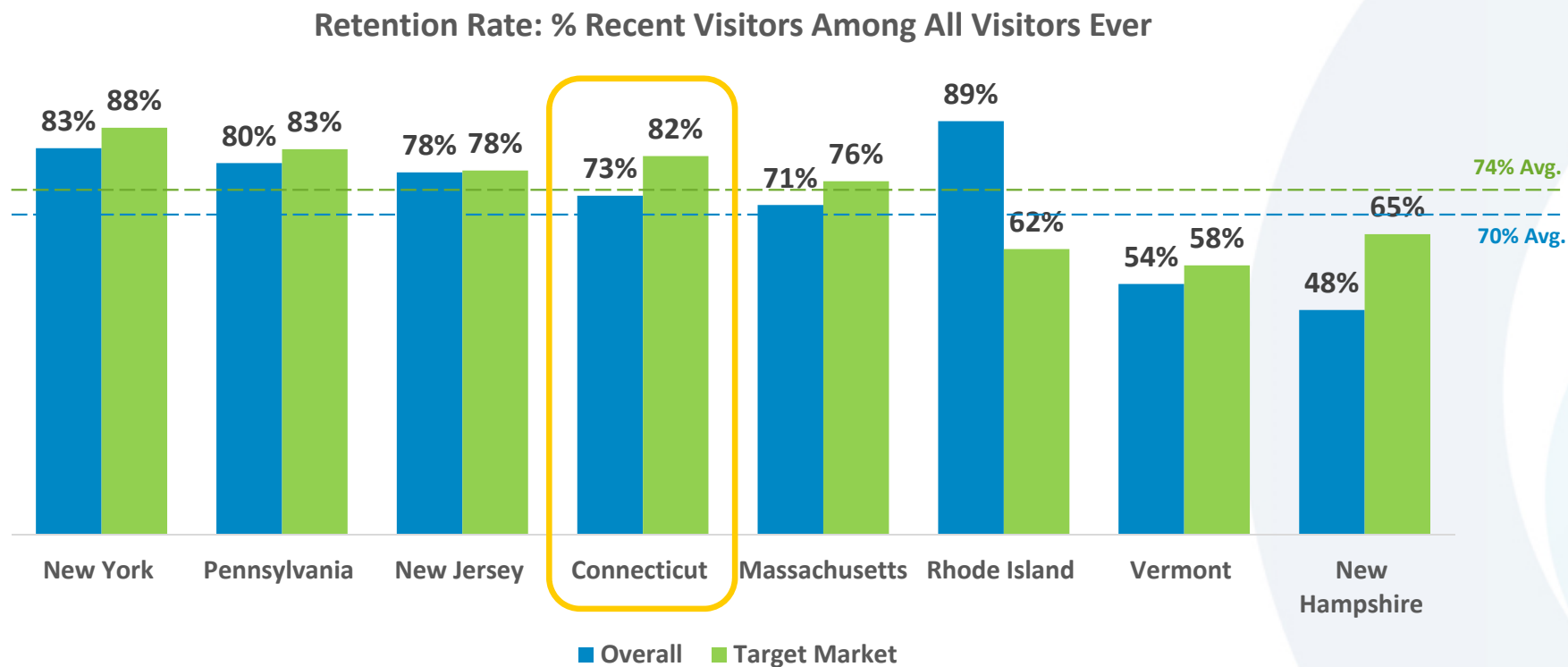
Connecticut converts nearly three-quarters of those who are familiar with Connecticut as a travel brand – about average among the competitive set.



Q10: Using the scale provided, please indicate which of the following destinations have you visited for a getaway in the last five years? (5-pt. scale)

RESPONDENT BASE: OVERALL RESPONDENTS | N=2,202
TARGET MARKET RESPONDENTS | N=846

Connecticut's retention of past visitors is quite good. Among target travelers (82%), Connecticut's retention rate is one of the highest in the competitive set.

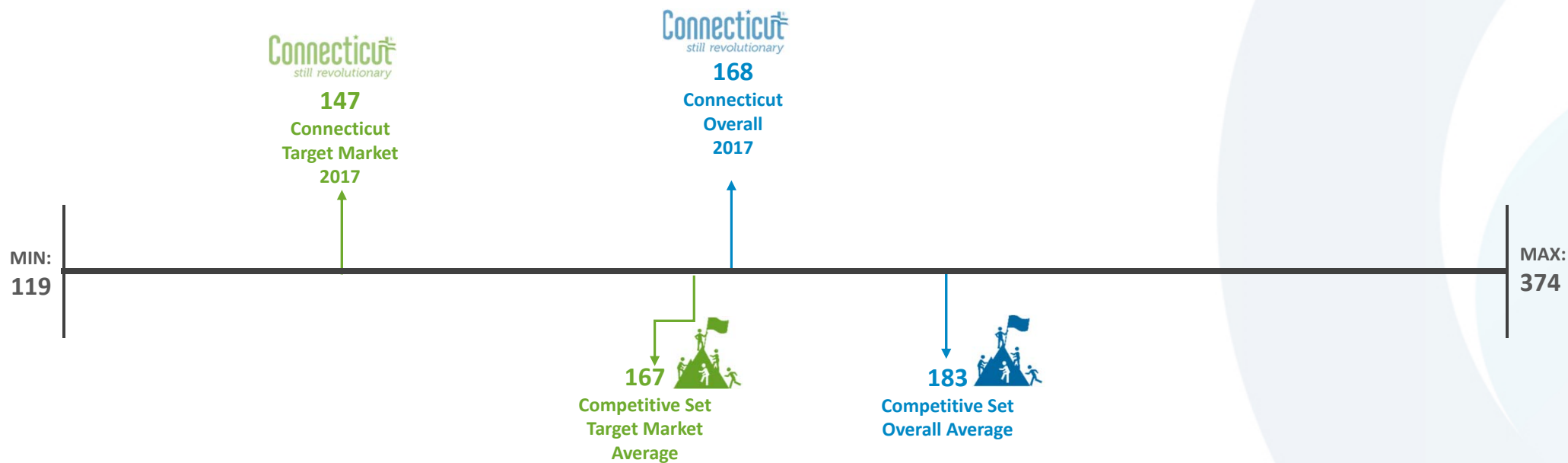


Q10: Using the scale provided, please indicate which of the following destinations have you visited for a getaway in the last five years? (5-pt. scale)

RESPONDENT BASE: OVERALL RESPONDENTS | N=2,202
TARGET MARKET RESPONDENTS | N=846

Connecticut's Visitor Growth Indicator (VGI)*, at 215 overall, reveals that the state's market potential averages about twice the rate of its current level of visitation, but isn't quite as high as it is for others in the competitive set (241).

Connecticut Visitor Growth Indicator (VGI)



*VGI = Market Potential / Market Share (% Recents). VGI is a tool that measures a destination's market potential relative to its current market share.

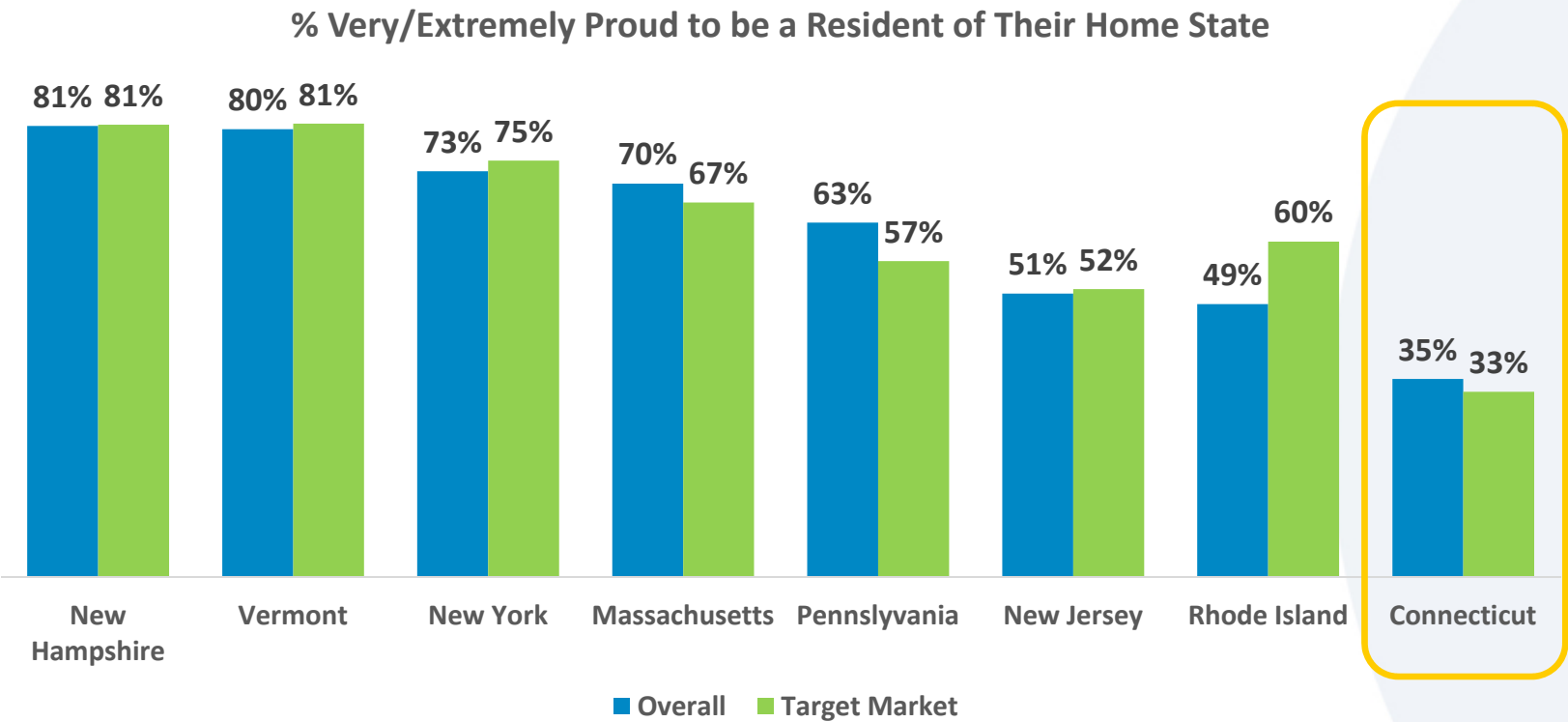
**H2R Proprietary Industry Norm includes Regional, Nationwide and International destinations. Norms are for destinations with Regional, Nationwide or International Campaigns.

RESPONDENT BASE: OVERALL RESPONDENTS | N=2,202
TARGET MARKET RESPONDENTS | N=846

Brand Perception

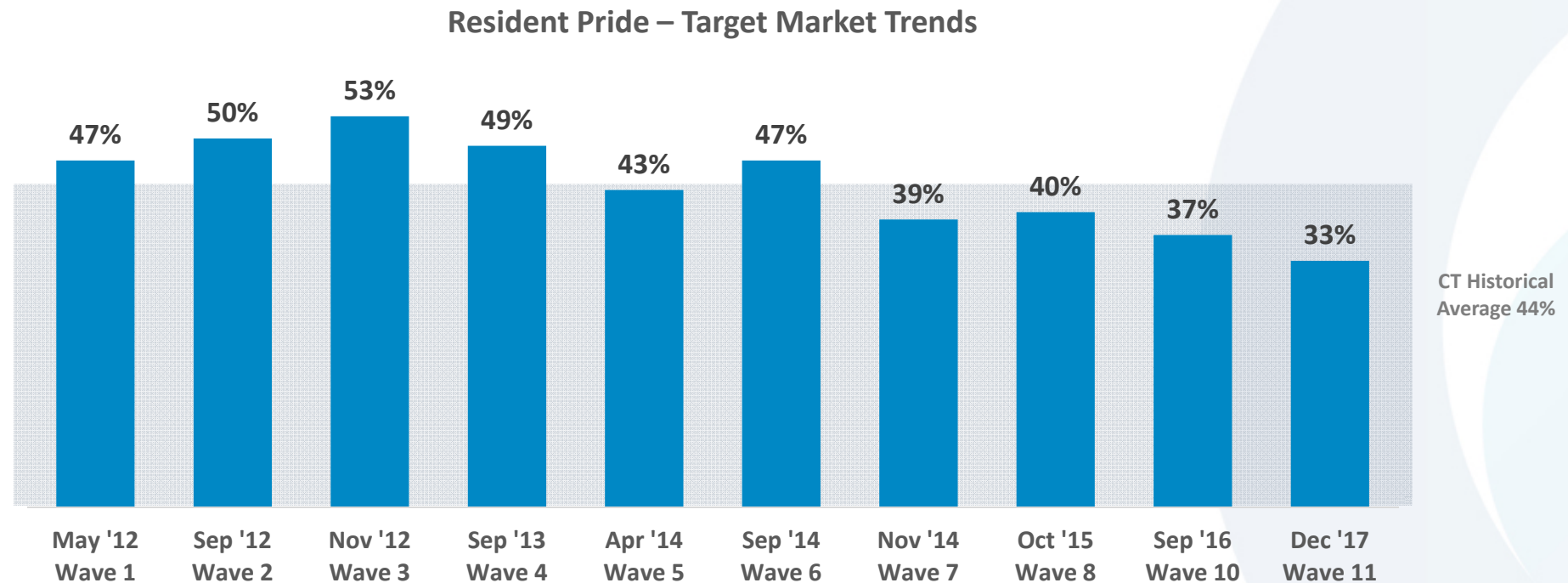
03

Connecticut residents are not particularly proud of the state. Conversely, residents of New Hampshire and Vermont are quite proud of their states.



Q14: How proud do you feel about being a resident of your state? (5-pt. scale)

Connecticut resident pride has continued to slip steadily with only about one-third of Connecticut residents saying they are proud to live in their state—a 4-point decline compared to last year.



Q14: How proud do you feel about being a resident of your state? (5-pt. scale)

A collage of torn paper scraps on a brown, textured background. The word 'PANICKING' is prominently displayed in the center in a bold, white, sans-serif font on a dark blue, torn-edge strip. Surrounding it are various other words and phrases on white, torn-edge strips: 'uncertainty' at the bottom, 'reality,' to the right, 'health' at the bottom right, 'money,' to the left, 'turmoil' above 'money,', 'oil' above 'turmoil', 'work' above 'oil', 'perception' at the top right, 'challenges' to the right of 'PANICKING', 'cope' below 'money,', 'government' to the left of 'turmoil', 'using market' at the top left, 'jobs' to the right of 'using market', 'series' to the right of 'perception', 'f' and 'co' to the right of 'series', and 'serious' to the right of 'challenges'. The strips are layered and overlapping, creating a sense of chaotic information.

- Connecticut Budget Remains in the Red
- Connecticut's Economy is Not Competitive
- Connecticut Residents are Fleeing the State
- Connecticut Continues to Lose Jobs
- Seniors Fear Losing Health Care
- Non-Profits Could Lose Funding
- Roads & Bridges are Crumbling
- Education system is flawed
- And, Connecticut Residents Believe Business Conditions are Worsening.

According to the target market, Connecticut's top brand characteristics continue to be its beautiful foliage, small towns to explore and scenery. Those reached by the COT marketing communications have a much higher opinion of the brand than those who were not reached.



71% | 61%

Beautiful Fall Foliage



74% | 57%

Interesting Small Towns to Explore



66% | 56%

Beautiful Scenery

■ Aware of Marketing Communications

■ Unaware of Marketing Communications

Q25: Using a five point scale where 1 is "doesn't describe well at all" and 5 is "describes extremely well," indicate how well each statement describes Connecticut as a place to visit.

RESPONDENT BASE: TARGET MARKET RESPONDENTS | N=846

Brand Characteristics: Target Market Aware vs. Unaware of Advertising

Describes CT well/extremely well 2017 Aware vs. Unaware of Marketing	Aware of Marketing	Unaware of Marketing		Aware of Marketing	Unaware of Marketing
Has interesting small towns to explore	74%	57%	Great place to spend time with children	54%	34%
Offers casino entertainment	73%	55%	Offers great culinary experiences	52%	34%
Has beautiful fall foliage	71%	61%	Has great antiquing	52%	34%
Offers beautiful scenery	66%	56%	Offers a romantic escape	52%	35%
Has lots of historic sites to visit	65%	46%	Offers "pick your own" farms	50%	32%
Great place to spend time with my friends	64%	39%	Has friendly, welcoming people	49%	39%
Has lots of things to see and do	61%	39%	Has great shopping	49%	37%
Great place to rest and relax	61%	44%	Has vineyards/wineries	47%	32%
Great place to spend time with my spouse	60%	45%	Has winter activities	45%	39%
Offers a sense of history	58%	46%	Offers exciting nightlife	43%	24%
Is a fun destination	58%	40%	Offers action/adventure sports	42%	24%
Has nice resorts/spas	56%	36%	Is a good place for fishing	40%	27%
Is a good place for hiking/biking	56%	38%	Offers a good value for the money	38%	30%
Is a good place for boating	55%	33%	Good place for golfing	38%	23%
Offers arts and culture	55%	36%	Has great theatre	37%	22%
Offers great inns/B&Bs	55%	38%	Has great beaches	33%	21%

Q25: Using a five point scale where 1 is "doesn't describe well at all" and 5 is "describes extremely well," indicate how well each statement describes Connecticut as a place to visit.

Brand Characteristics - Target Market Comparison

Describes CT well/extremely well – TARGET MARKET	Sep '15 Wave 8	Sep '16 Wave 10	Dec '17 Wave 11
Has beautiful fall foliage	80%	73%	68%
Has interesting small towns to explore	74%	68%	65%
Offers beautiful scenery	74%	68%	64%
Great place to rest and relax	66%	55%	54%
Has lots of historic sites to visit	68%	58%	54%
Offers a sense of history as part of the landscape	68%	58%	53%
Great place to spend time with my spouse/significant other	64%	57%	51%
Offers casino entertainment	74%	67%	51%
Is a fun destination	55%	49%	47%
Offers great inns/B&Bs	62%	50%	46%
Has friendly, welcoming people	55%	45%	46%
Has winter activities	56%	44%	46%
Has lots of things to see and do	62%	51%	45%
Great place to spend time with my friends	62%	51%	45%
Is a good place for hiking/biking	60%	51%	44%
Offers a romantic escape	54%	47%	43%

Q25: Using a five point scale where 1 is "doesn't describe well at all" and 5 is "describes extremely well," indicate how well each statement describes Connecticut as a place to visit.

Brand Characteristics - Target Market Comparison, Continued...

Describes CT well/extremely well – TARGET MARKET	Sep '15 Wave 8	Sep '16 Wave 10	Dec '17 Wave 11
Offers arts and culture	58%	47%	43%
Great place to spend time with children	56%	48%	42%
Has great antiques	58%	48%	42%
Has great shopping	56%	47%	41%
Has nice resorts/spas	54%	48%	40%
Is a good place for boating	59%	46%	38%
Offers great culinary experiences	55%	46%	38%
Offers "pick your own" farms	60%	51%	36%
Has vineyards/wineries	54%	43%	36%
Offers a good value for the money	45%	38%	36%
Is a good place for fishing	49%	40%	34%
Offers action/adventure sports (e.g. zip lining, rock climbing)	43%	37%	30%
Offers exciting nightlife	42%	35%	29%
Good place for golfing	48%	38%	28%
Has great beaches	45%	38%	28%
Has great theatre	43%	32%	25%

Q25: Using a five point scale where 1 is "doesn't describe well at all" and 5 is "describes extremely well," indicate how well each statement describes Connecticut as a place to visit.

Travelers from the target market are most likely to associate Connecticut with words/phrases such as Historical, Close By and Clean. Once again, those aware of the COT marketing communications are much more likely to make these associations.



66% | 53%

Historical



76% | 58%

Close By



59% | 49%

Clean

■ Aware of Marketing Communications

■ Unaware of Marketing Communications

Q26: Using a five point scale where 1 is "doesn't describe well at all" and 5 is "describes extremely well," please indicate how well each word/phrase describes Connecticut.

RESPONDENT BASE: TARGET MARKET RESPONDENTS | N=846

Brand Descriptors – Target Market Aware vs. Unaware of Marketing

Describes CT well/extremely well 2017 Aware vs. Unaware of Marketing	Aware of Marketing	Unaware of Marketing		Aware of Marketing	Unaware of Marketing
Close by	76%	58%	Exciting	44%	27%
Historical	66%	53%	Down-to-earth	43%	32%
Clean	59%	49%	Artsy	43%	30%
Upscale	56%	47%	Fresh	42%	28%
Traditional	56%	50%	Inspiring	40%	27%
Nature-oriented	55%	40%	Pretentious	37%	32%
Fun	53%	37%	Trendy	36%	25%
Quaint	53%	46%	Revolutionary	36%	25%
Cultural	52%	38%	Vibrant	35%	27%
Friendly	51%	40%	Affordable	33%	24%
Welcoming	51%	41%	Innovate	33%	21%
Smart	49%	37%	Contemporary	30%	31%
Sophisticated	48%	40%	Bold	29%	17%
Diverse	46%	27%	Unexpected	28%	16%

Q26: Using a five point scale where 1 is "doesn't describe well at all" and 5 is "describes extremely well," please indicate how well each word/phrase describes Connecticut.

Brand Descriptors – Target Market Comparison

Describes CT well/extremely well – TARGET MARKET	Sep '15 Wave 8	Sep '16 Wave 10	Dec '17 Wave 11
Historical	74%	65%	60%
Close by	78%	66%	60%
Clean	67%	56%	57%
Traditional	70%	60%	55%
Quaint	65%	56%	54%
Upscale	63%	58%	50%
Welcoming	60%	47%	49%
Nature-oriented	59%	50%	48%
Friendly	58%	46%	48%
Cultural	59%	45%	47%
Sophisticated	56%	46%	44%
Smart	55%	48%	43%
Fun	58%	46%	43%
Down-to-earth	52%	39%	38%

Q26: Using a five point scale where 1 is "doesn't describe well at all" and 5 is "describes extremely well," please indicate how well each word/phrase describes Connecticut.

Brand Descriptors – Target Market Comparison, Continued...

Describes CT well/extremely well – TARGET MARKET	Sep '15 Wave 8	Sep '16 Wave 10	Dec '17 Wave 11
Fresh	51%	38%	37%
Artsy	49%	38%	34%
Exciting	44%	36%	34%
Inspiring	45%	32%	33%
Pretentious	42%	43%	33%
Contemporary	49%	38%	33%
Diverse	52%	38%	31%
Affordable	43%	31%	31%
Trendy	42%	36%	31%
Vibrant	46%	34%	31%
Revolutionary	43%	30%	30%
Innovate	41%	27%	27%
Bold	34%	21%	22%
Unexpected	36%	23%	22%

Q26: Using a five point scale where 1 is "doesn't describe well at all" and 5 is "describes extremely well," please indicate how well each word/phrase describes Connecticut.

New England travelers from the target market are most likely to view Connecticut as having a lot of educated people for the workforce, a good quality of life and being a great place to raise a family.



60% | 51%
Lots of Educated People to Hire



57% | 47%
Good Quality of Life



55% | 45%
Great Place to Raise a Family

■ Aware of Marketing Communications

■ Unaware of Marketing Communications

Q27: Please indicate how well each of the following words/phrases describes Connecticut when thinking about it as a place to live, work raise a family or start a business. (5-pt.scale)

Connecticut Business Characteristics – Target Market Aware vs. Unaware

Describes CT well/extremely well – Aware vs. Unaware of Marketing	Aware of Marketing	Unaware of Marketing
Has lots of educated people if you are hiring	60%	51%
A place with a good quality of life	57%	47%
Great place to have kids and raise a family	55%	45%
Great place to live	51%	40%
Place with creative people	48%	33%
A great place to meet interesting people	48%	35%
State with lots of diversity	47%	29%
Has lots of quality skilled labor if you are hiring	45%	32%
A progressive state	43%	36%
A great place for businesses to network	42%	28%
Place with innovative people	41%	28%
A state with a lot of growth	40%	28%
Great place to work	38%	32%
A dynamic, innovative state	38%	24%
A place you can get things done quickly	38%	26%
Great place for innovation	36%	24%
Great place to relocate an existing business	36%	22%
Friendly to businesses	35%	31%
A place of ingenuity	35%	24%
Great place to start up a business	33%	22%

Q27: Please indicate how well each of the following words/phrases describes Connecticut when thinking about it as a place to live, work raise a family or start a business. (5-pt.scale)

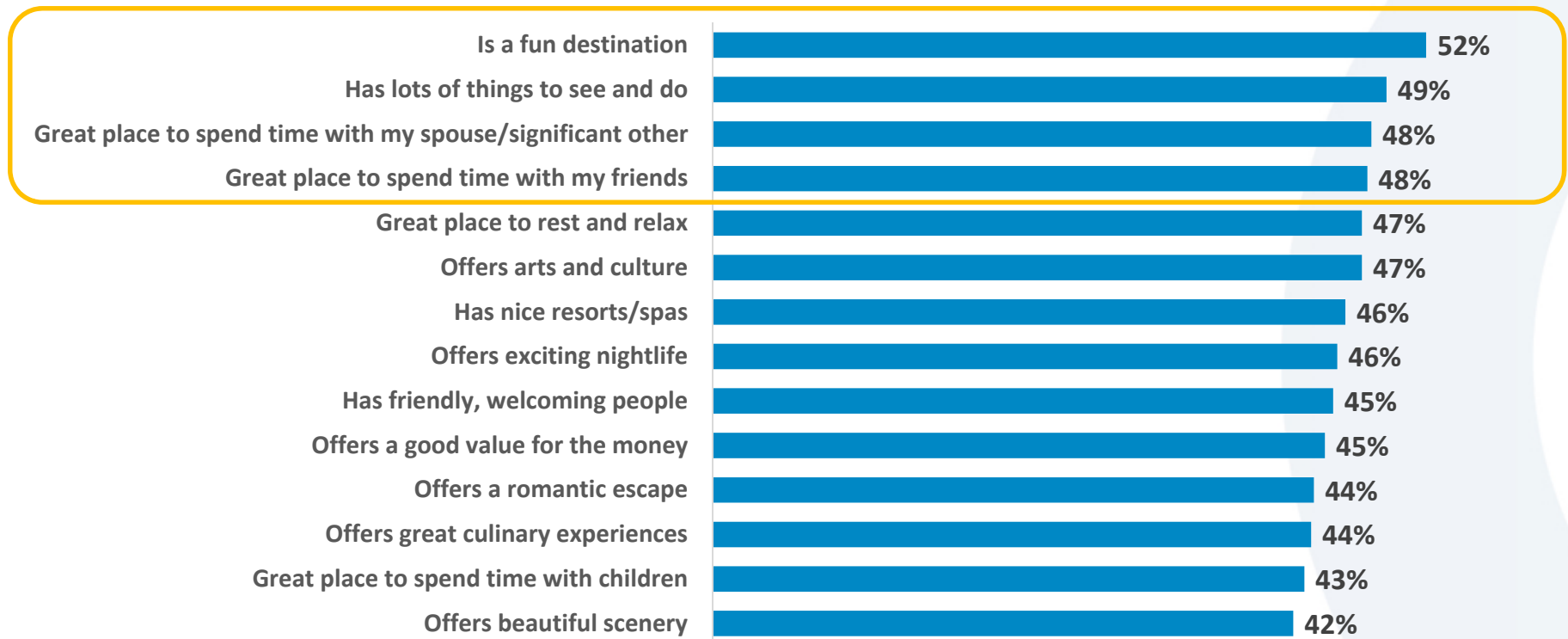
Connecticut Business Development Characteristics – Comparison

Describes CT well/extremely well – TARGET MARKET	Sep '15 Wave 8	Sep '16 Wave 10	Dec '17 Wave 11
Lots of educated people if hiring	67%	56%	53%
Place with good quality of life	64%	54%	53%
Great place to raise a family	60%	53%	49%
Great place to live	57%	49%	47%
Place with creative people	56%	45%	41%
Great place to meet interesting people	54%	44%	40%
A progressive state	51%	41%	41%
State with lots of diversity	53%	41%	32%
Lots of quality skilled labor if hiring	50%	40%	35%
Great place to work	45%	40%	34%
Place with innovative people	51%	39%	33%
Great place for businesses to network	46%	37%	32%
A state with a lot of growth	44%	37%	34%
Friendly to businesses	43%	36%	35%
A place ingenuity	44%	36%	28%
Place you can get things done quickly	41%	35%	31%
Great place for innovation	46%	35%	28%
Dynamic, innovative state	43%	34%	29%
Great place to start up a new business	37%	32%	27%
Great place to relocate existing business	38%	31%	28%

Q27: Please indicate how well each of the following words/phrases describes Connecticut when thinking about it as a place to live, work raise a family or start a business. (5-pt.scale)

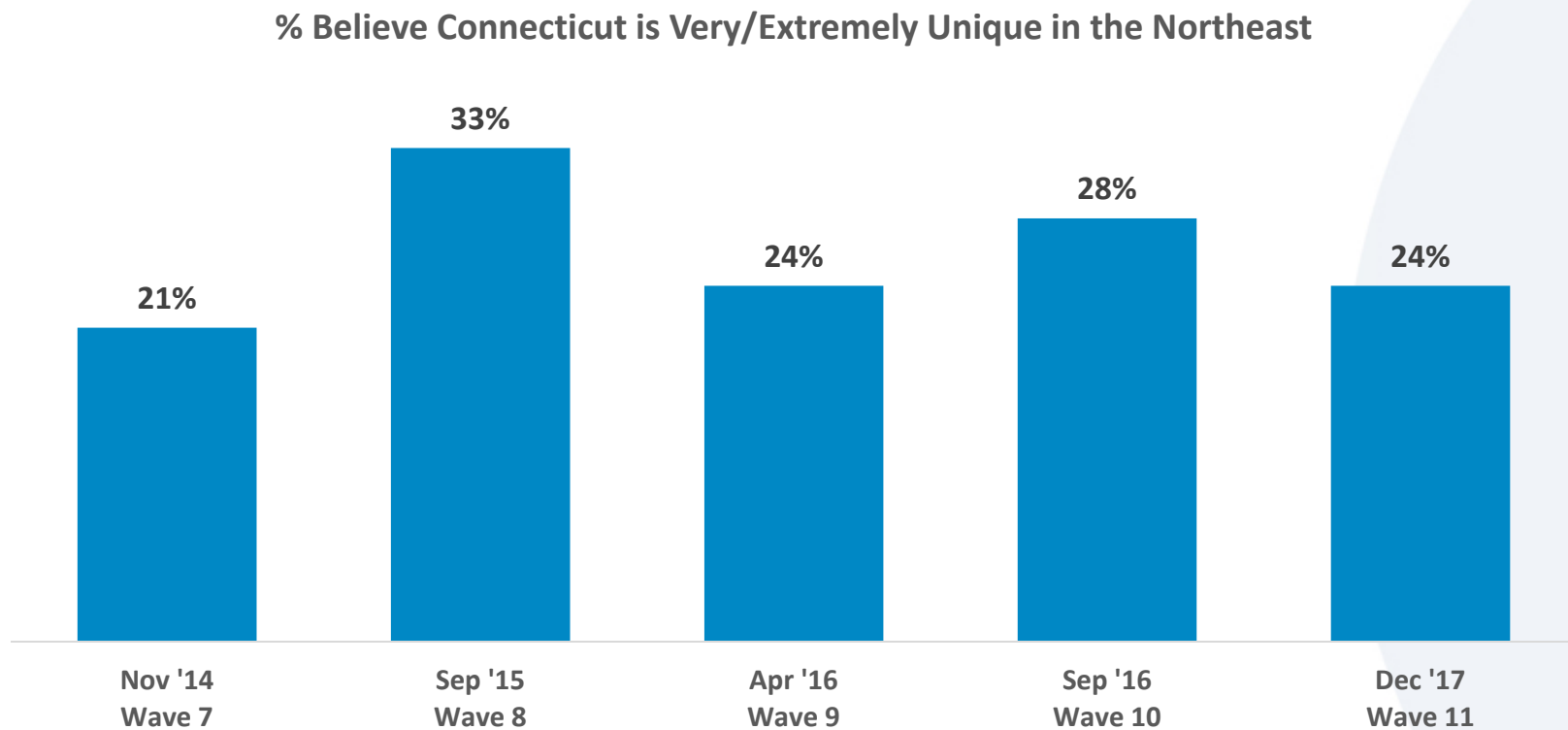
The characteristics, or “choice drivers,” that align most closely with travelers’ interest in visiting Connecticut center around fun, connection and variety.

Characteristics with Highest Correlations with Interest in Visiting



Q25: Using a five point scale where 1 is "doesn't describe well at all" and 5 is "describes extremely well," indicate how well each statement describes Connecticut as a place to visit.

Nearly one-quarter of target market travelers believe that Connecticut is unique in comparison to other Northeastern states.



Q28: How unique would you say Connecticut is compared to other Northeastern states? (5-pt.scale)

Marketing Communication Impact

MARKETING IMPACT KPIs



The 2017 Marketing Communications Campaign reached **3.58M** households up 11%

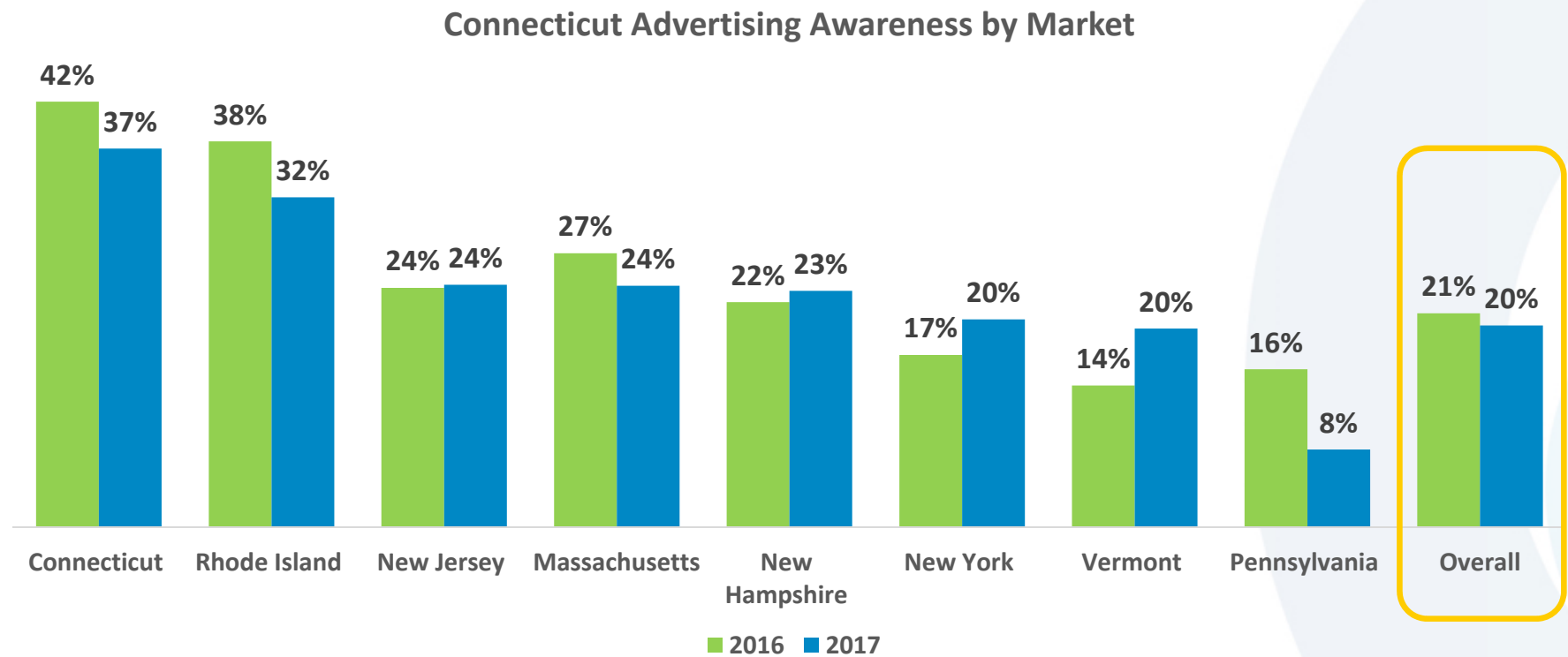


Marketing efficiency, or the gross cost per aware household, averaged **\$0.61** comparable to 2016



Connecticut's 2017 Marketing Communications Campaign generated **292k** incremental trips

Similar to results experienced nationwide this past year, Connecticut's overall ad awareness slipped by 1 point, but enjoyed increases among both New York and Vermont residents.



Q13: And, even if you already mentioned them, please indicate which of these STATES you have seen, heard or read any marketing communications including online news stories, social postings, advertisements or paid search result listings in 2017.

Market Reach (Aware Traveler Households) Increased 11%

Connecticut's marketing messages reached more than 3.5 million traveler households in the Northeast—an increase of 11% over 2016.

Despite awareness declines in several markets, an increase in the number of traveler households this year worked in Connecticut's favor. More households were reached in all but one market (Pennsylvania), fueling the overall increase in market reach this year.

Market	2016 Market Reach	2017 Market Reach	% +/-
New York	908k	1,214k	+34%
New Jersey	592k	701k	+18%
Massachusetts	516k	565k	+9%
Connecticut	422k	478k	+13%
Pennsylvania	573k	334k	-42%
Rhode Island	115k	128k	+11%
New Hampshire	85k	114k	+34%
Vermont	26k	47k	+81%
Total Market	3.24M	3.58M	+11%

Marketing Efficiency (Cost per Aware Household)

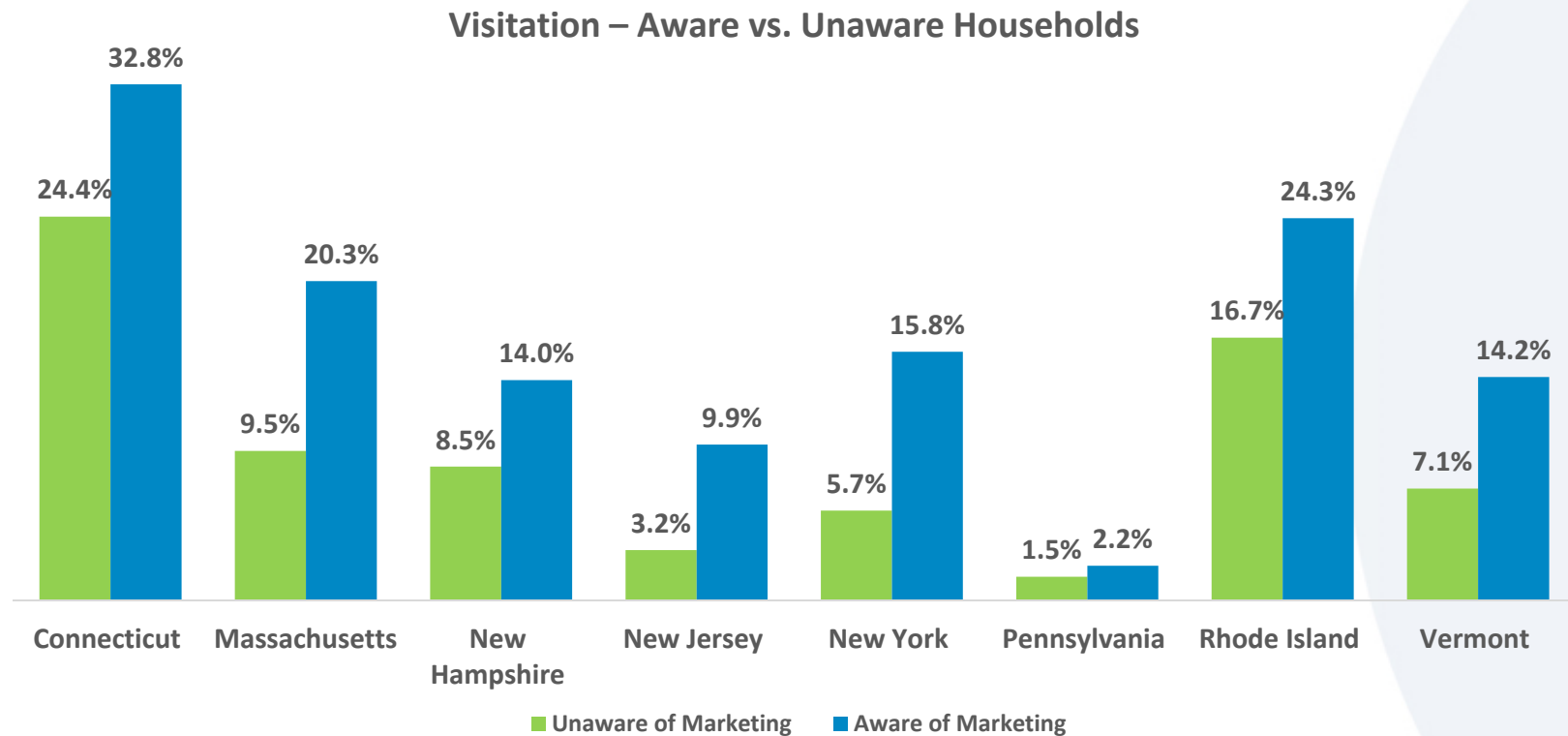
Marketing efficiency, or the average cost per aware travel household for 2017 was comparable to 2016.

Overall, marketing efficiency averaged \$0.61 in 2017. Costs per aware travel household varied from \$0.09 in Vermont to \$0.86 in Connecticut. Cost per aware household decreased by half in Vermont compared to 2016, with decreases in costs seen from New Jersey, New Hampshire, and Connecticut as well.

Market	Advertising Investment	Total Market Reach	2017 Cost/ Aware HH	2016 Cost/ Aware HH*
Vermont	\$4k	47k	\$0.09	\$0.18
Pennsylvania	\$33k	334k	\$0.10	\$0.06
New Jersey	\$184k	701k	\$0.26	\$0.32
New Hampshire	\$41k	114k	\$0.36	\$0.57
Rhode Island	\$86k	128k	\$0.67	\$0.54
New York	\$957k	1,214k	\$0.79	\$0.60
Massachusetts	\$478k	565k	\$0.85	\$0.63
Connecticut	\$414k	478k	\$0.86	\$1.65
Total Market	\$2.2M	3.58M	\$0.61	\$0.59

**These figures were adjusted from last year's report to reflect apples-to-apples calendar year spending for both 2017 and 2016.*

Every state in the COT target market once again produced positive incremental conversion gains for Connecticut. That is, those reached by the ads were consistently more likely to have visited than those who were not reached.



Q17: How long has it been since you last visited Connecticut for a getaway?

Incremental Conversion Increased in 2017

The 2017 marketing communications campaign generated incremental travel of more than 8%, up 0.4 percentage points from last year.

Meaning that those reached by the COT marketing communications efforts converted to visitors at a higher level than those who were not impacted by the state's marketing efforts.

Market	2016 Incremental Travel	2017 Incremental Travel
Massachusetts	+6.3%	+10.8%
New York	+9.9%	+10.1%
Connecticut	+8.7%	+8.5%
Rhode Island	+10.5%	+7.6%
Vermont	+23.1%	+7.1%
New Jersey	+5.7%	+6.6%
New Hampshire	+3.4%	+5.5%
Pennsylvania	+6.8%	+0.7%
Total Market	+7.8%	+8.2%

Incremental Conversion Delivered 292k Incremental Trips

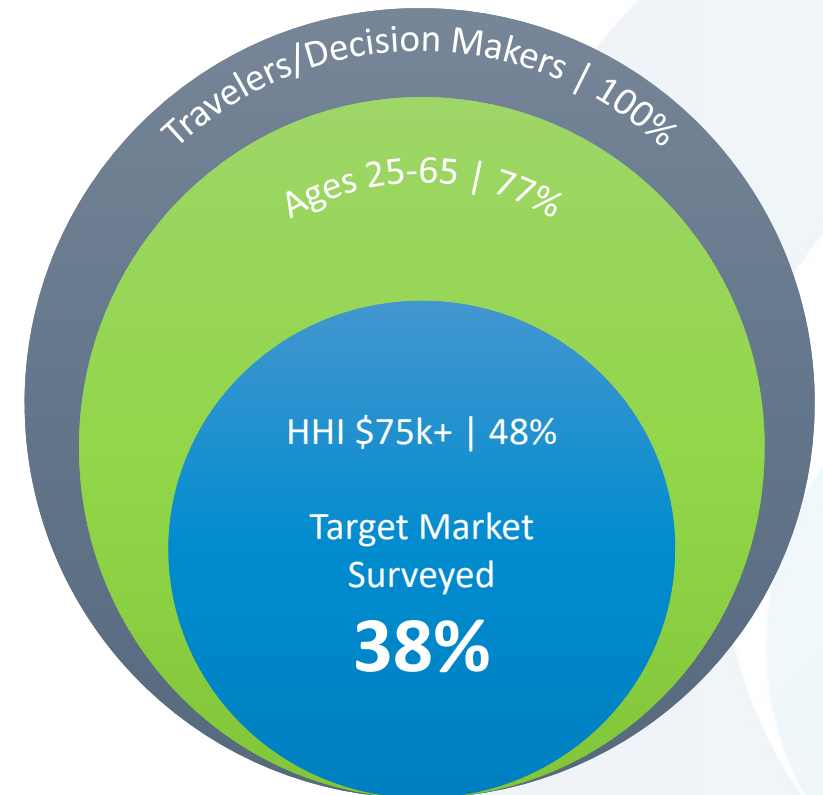
Extrapolated across the number of aware traveler households in the Northeast, incremental travel equated to more than 292k incremental trips.

These are incremental trips that were a direct result of the COT advertising that would not have occurred otherwise. The largest number of incremental trips came from both New York and Massachusetts residents.

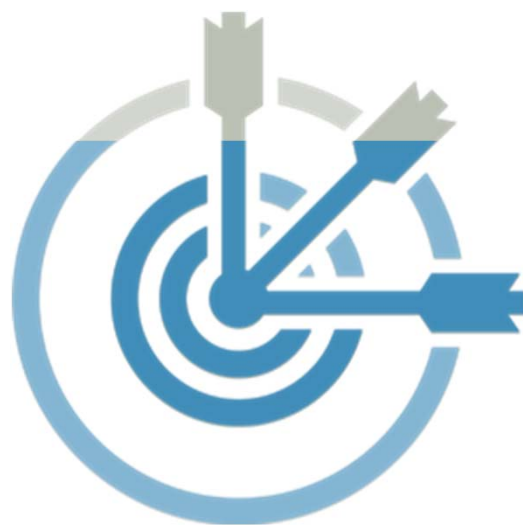
Market	2016 Incremental Trips	2017 Incremental Trips
New York	+89.4k	+122.7k
Massachusetts	+32.4k	+61.0k
New Jersey	+33.8k	+46.3k
Connecticut	+36.9k	+40.6k
Rhode Island	+12.1k	+9.8k
New Hampshire	+2.9k	+6.2k
Vermont	+6.1k	+3.3k
Pennsylvania	+38.8k	+2.5k
Total Market	+253k	+292k



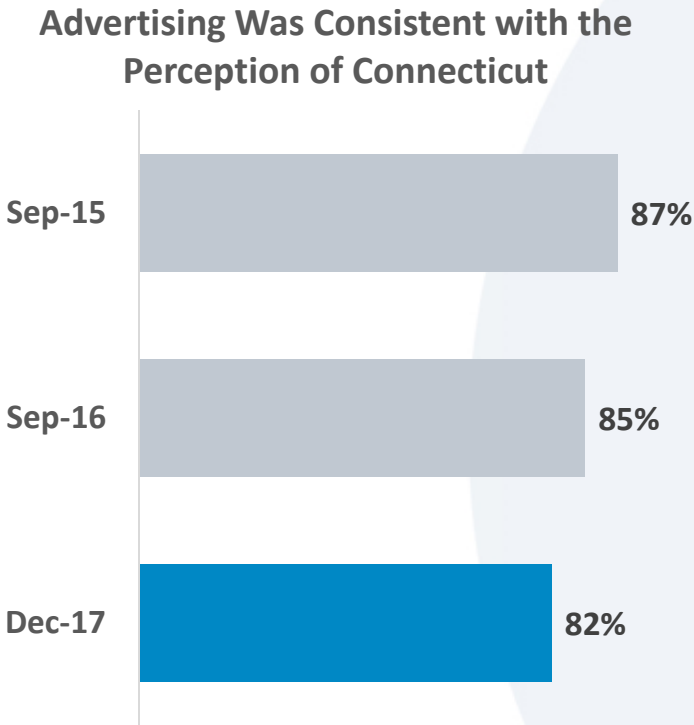
The following Marketing Evaluations are reported among the COT target market which consists of travelers ages 25-65 who earn a household income of \$75k or more. These results are compared to the post-advertising campaign measurements from September 2015 and September 2016 among the same target market.



More than 8 in 10 travelers in the target market agree that the marketing they saw was consistent with their perception of Connecticut—on par with previous post-campaign measurements.



Brand Fit
82%



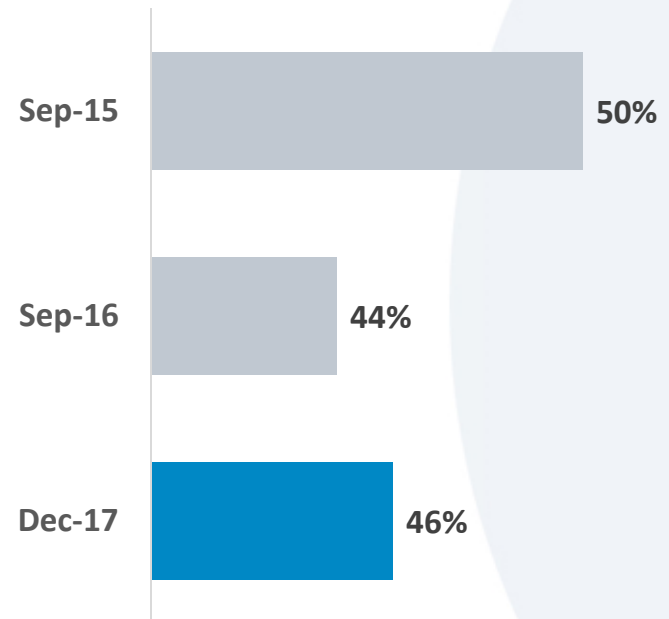
Q31: Were the online news stories, social media posts or advertisements you recall seeing consistent with your perception of Connecticut?

Target market travelers indicated they felt this past year's marketing communications delivered more new information than in 2016.



New Information
46%

Advertising Provided Me with New Information about Connecticut



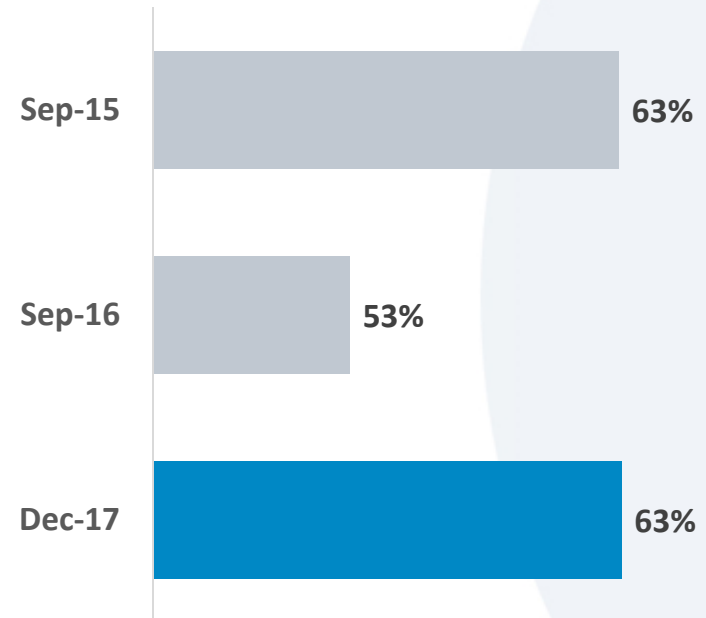
Q32: Did the online news stories, social media posts or advertisements tell you something new about Connecticut?

The marketing improved more than 6 in 10 travelers' opinions of Connecticut in 2017, up by a significant 10 point increase over 2016.



Improved Opinion of CT
63%

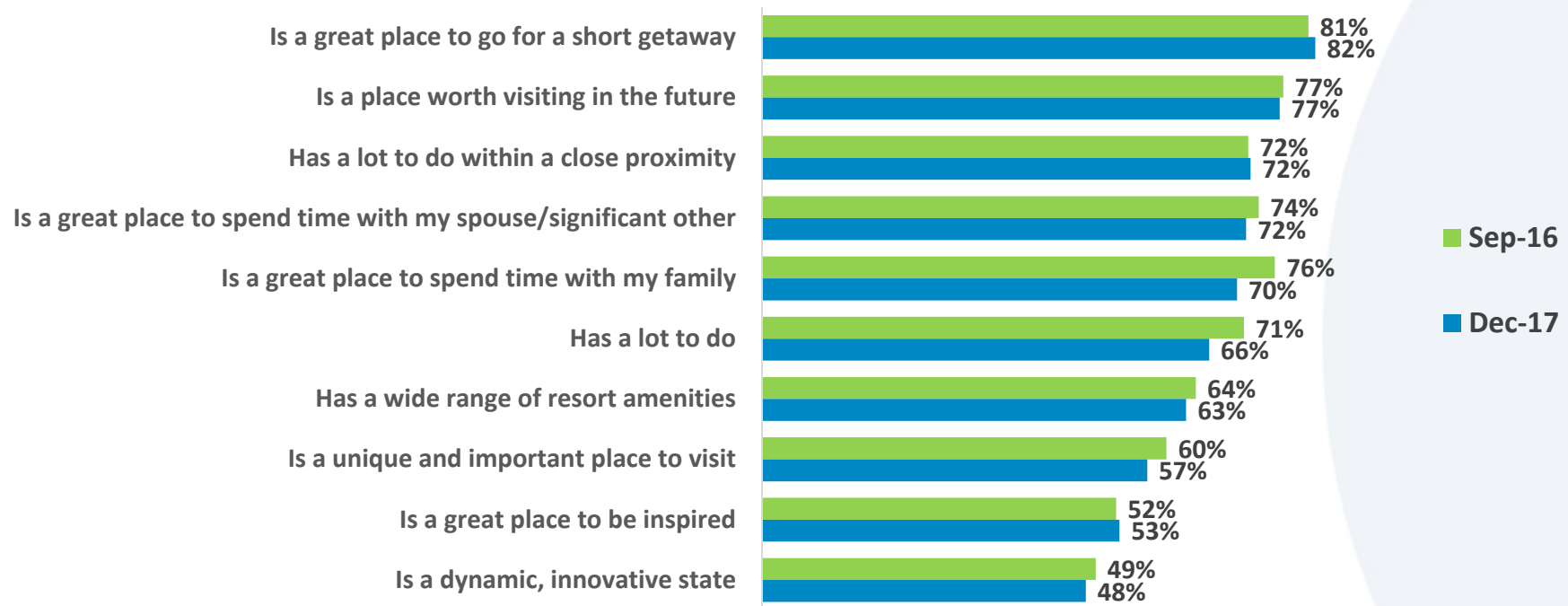
Advertising Improved My Opinion of Connecticut



Q33: Did the online news stories, social media posts or advertisements improve your opinion of Connecticut as a getaway destination?

Marketing continues to persuade travelers that Connecticut is a great place for a short getaway. And, many marketing takeaways remained on par with previous scores.

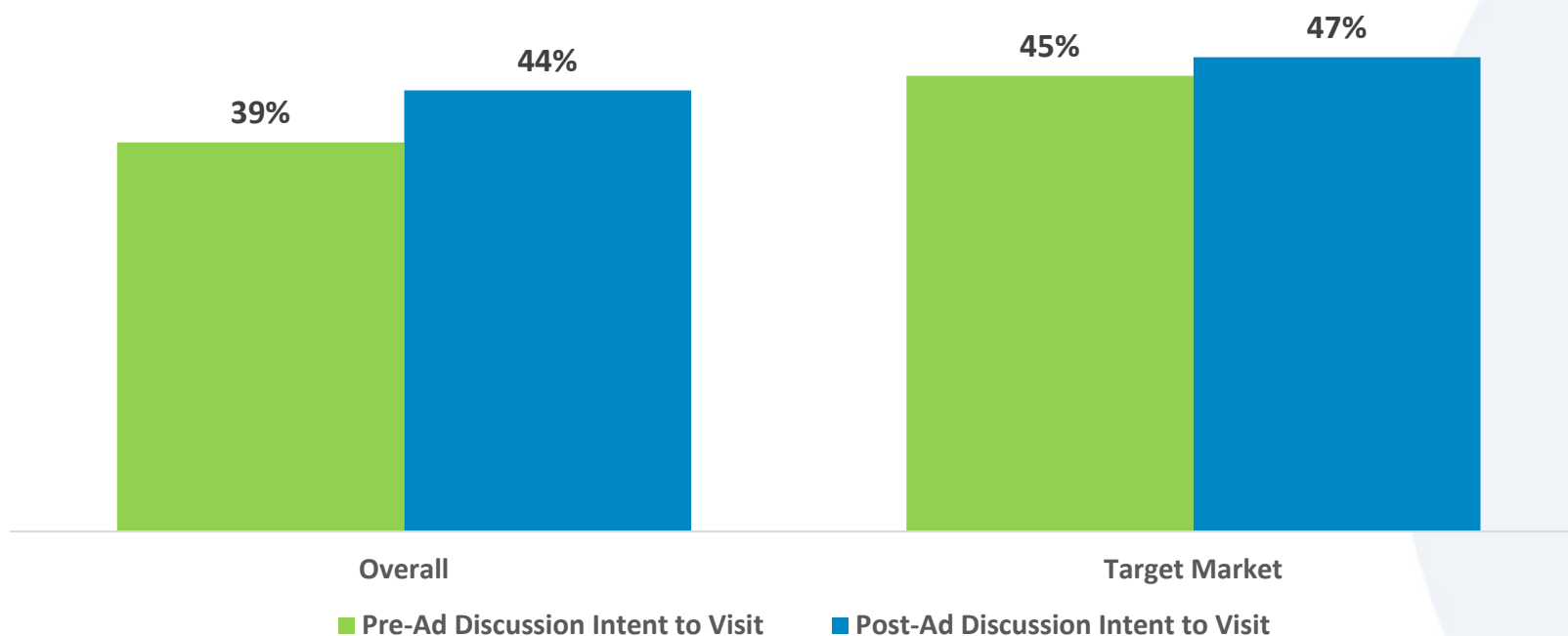
The Advertisements Made Me Think Connecticut...



Q34a: Did the marketing communications, online news stories or social media posts you saw or read make you think that Connecticut...?

Intent to visit ratings increased by 5 points overall (and by 2 points among the target market) after referencing the marketing communications campaign.

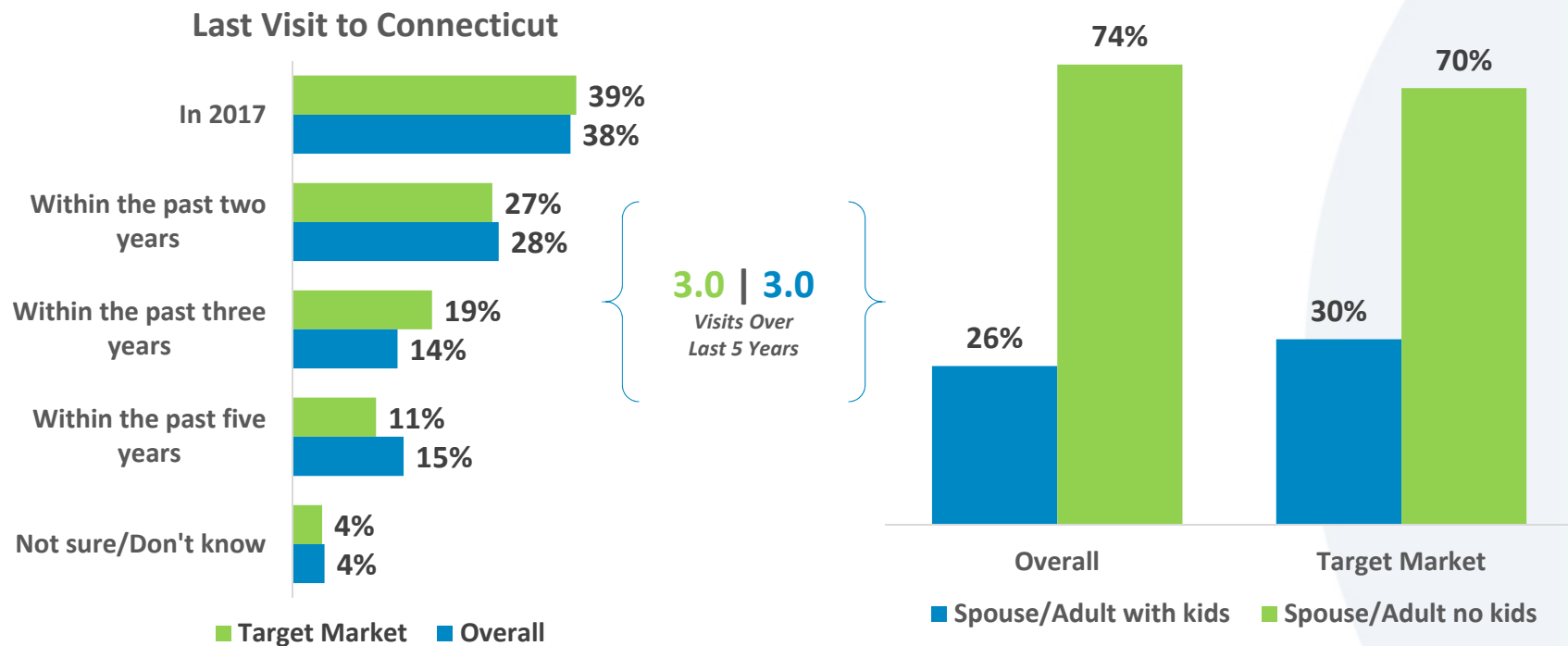
% Probably/Definitely Will Visit Connecticut in the Next 12 Months



Connecticut Visitor Behavior

05

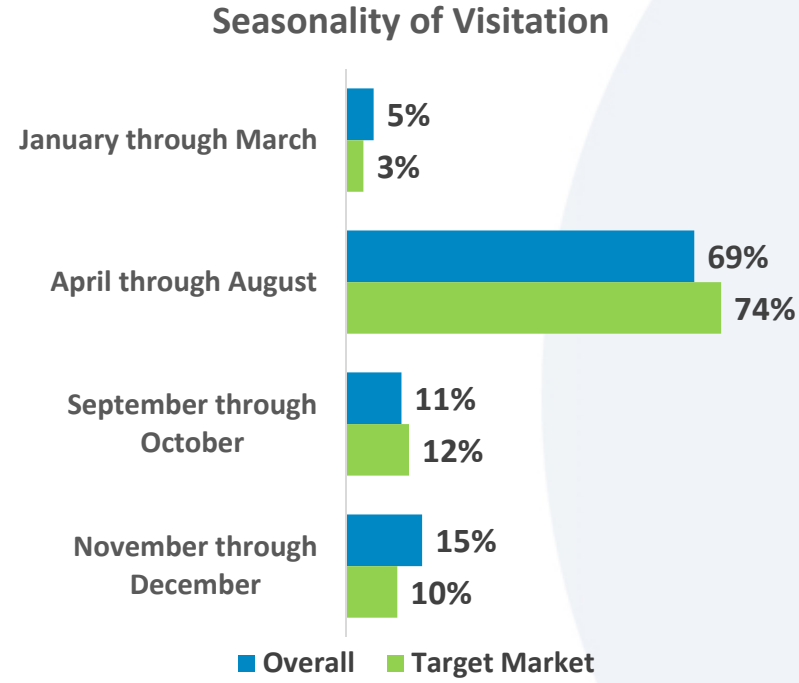
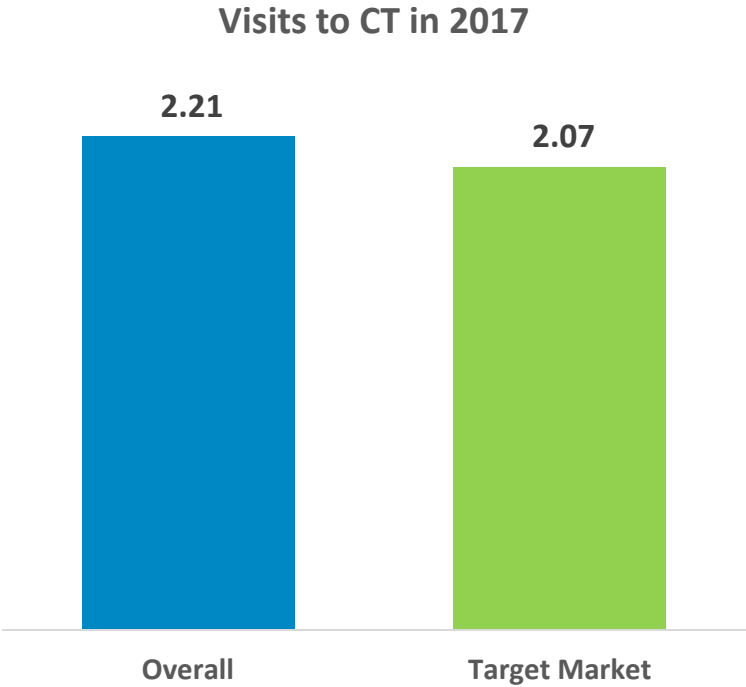
Overall travelers and those among the target audience exhibit similar visitation patterns.



Q16: How many times have you visited Connecticut for a getaway in the last five years?
Q17: How long has it been since you last visited Connecticut for a getaway?
Q21: With whom did you travel when visiting Connecticut for your most recent getaway?

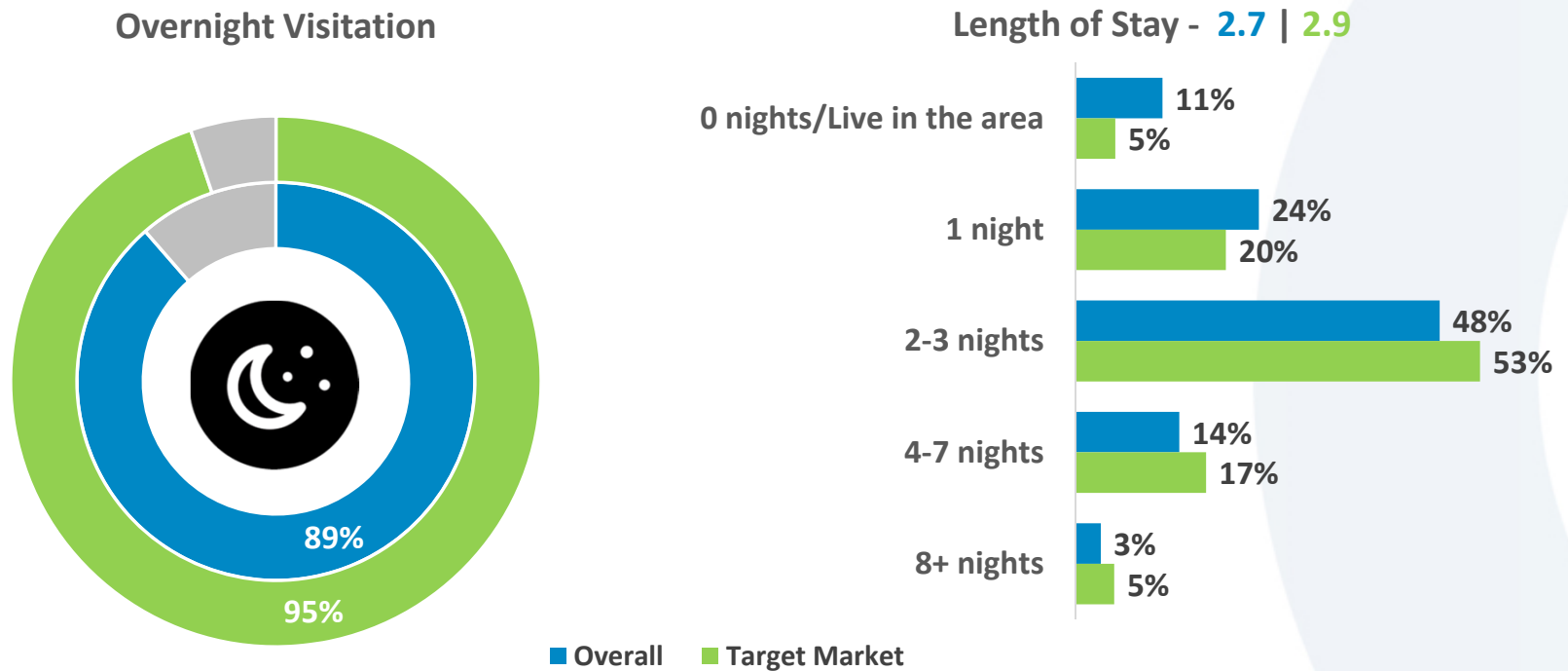
RESPONDENT BASE: OVERALL VISITED IN THE PAST 5 YEARS | N=882 65
TARGET MARKET VISITED IN THE PAST 5 YEARS | N=384

In 2017, travelers visited the state an average of 2.2 times with the April through August timeframe being the most popular.



Q18: How many times have you visited Connecticut for a getaway in 2017?
Q19: In which of the following months have you visited Connecticut in 2017?

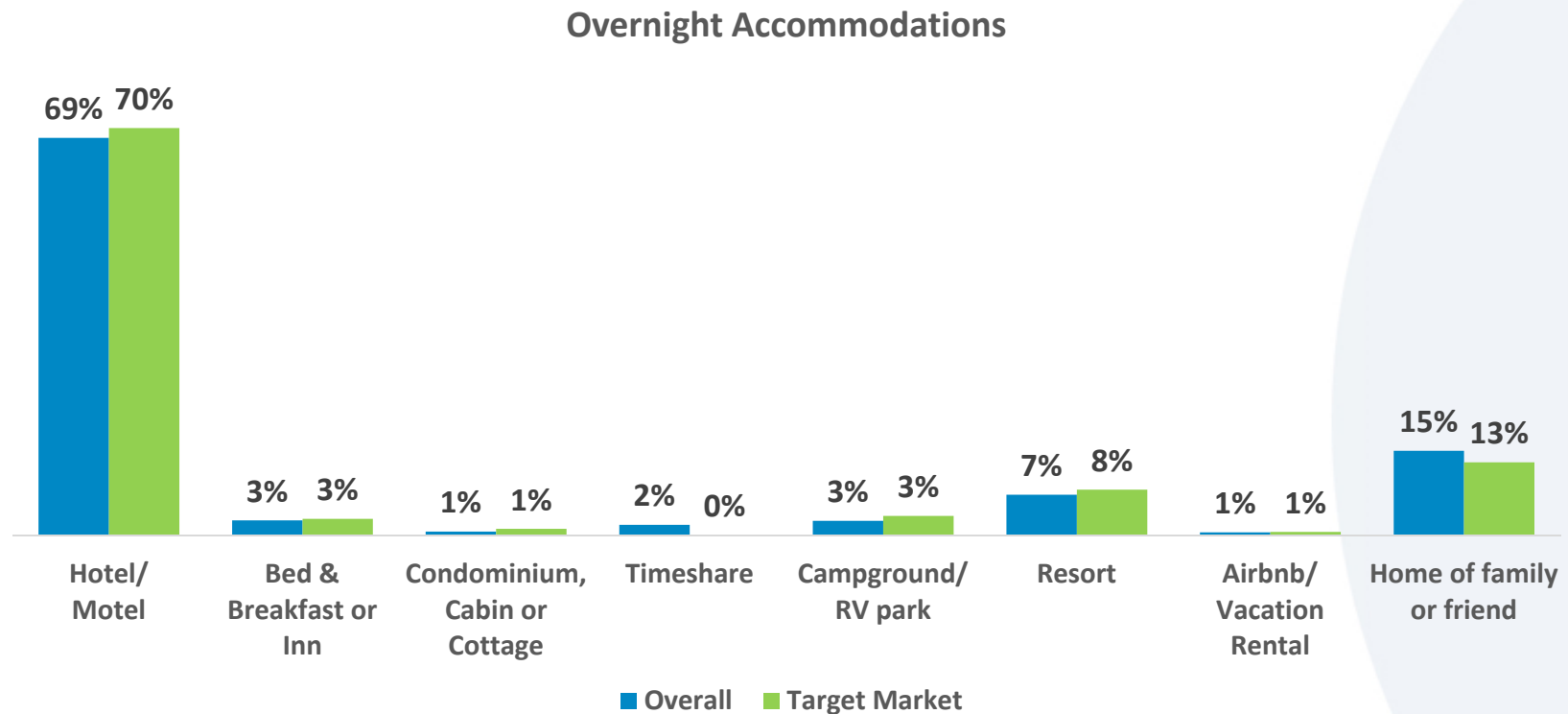
Similar to last year, the vast majority of Connecticut travelers stayed overnight on their last visit – with most staying nearly 3 nights.



Q22: How many nights did you spend in the area on your most recent trip?

RESPONDENT BASE: OVERALL VISITED CONNECTICUT IN THE PAST 2 YEARS | N=635 67
TARGET MARKET VISITED CONNECTICUT IN THE PAST 2 YEARS | N=281

More than two-thirds of overnight visitors stayed in traditional lodging sources, followed distantly by staying with friends/family or at a resort.



Q23: Which of the following best describes the type of accommodations you used on your most recent trip?

RESPONDENT BASE: OVERALL OVERNIGHT VISITORS | N=515 68
TARGET MARKET OVERNIGHT VISITORS | N=238

Recent Visitors to Connecticut were slightly younger, have higher incomes and are more likely to be employed full time than overall travelers.

Category	Overall Respondents	Recent Visitors	Non-Visitors
Household Income	\$87.3k	\$92.5k	\$84.0k
Age of Respondent	46.2	45.7	43.5
25-34	21%	25%	23%
35-54	35%	37%	39%
55+ years	34%	33%	27%
Aided Brand Awareness	60%	100%	100%
Assisted Ad Awareness	19%	41%	18%
Interest in Visiting Next 2 Years	36%	60%	34%
Incidence of Visitation Last 5 Years	32%	100%	0%
White, Non-Hispanic	82%	90%	84%
Black, Non-Hispanic	7.0%	3.9%	5.2%
Hispanic	4.3%	1.8%	4.5%
Asian	5.2%	3.7%	5.6%
Other	1.7%	0.9%	1.1%
Employed Full-Time	50%	56%	46%



Summary of Key Lagging Performance Indicators - Total

COT's lagging indicators once again performed comparatively well in 2017. Overall, the state's marketing efforts generated 292k incremental trips that would not have occurred if not for the COT marketing campaign.

Likewise, market reach grew by 11%, cost per aware travel household was nearly flat and incremental conversion rates improved.

Key Performance Indicator	2016	2017	Var
Market Reach	3.24M	3.58M	+0.34M
Cost/Aware Travel HH*	\$0.59	\$0.61	+\$0.02
Incremental Conversion	+7.8%	+8.2%	+0.4 pts
Incremental Trips	+252.5k	+292.3k	+39.8k

**These figures were adjusted from last year's report to reflect apples-to-apples calendar year spending for both 2017 and 2016.*

Impact of the COT Marketing Communications Upon the Target Market

COT's marketing communications had a clear and present impact upon those with whom the marketing messages reached.

The table to the right shows that travelers impacted by the COT marketing communications were more engaged, more interested in visiting and have more positive opinions of the state.

Relevant Performance Indicators	Aware	Unaware	Var.
Intent to Visit Connecticut	74%	42%	+32%
Planning to Visit as Result of Seeing Marketing Message	16%	10%	+6%
Brand Fit (% Yes)	86%	82%	+4%
New Information (% Yes)	42%	38%	+4%
Improved Opinion of Connecticut (% Yes)	63%	53%	+10%
Brand Assets (Avg. % T2B)	53%	37%	+16%
Brand Descriptors (Avg. % T2B)	46%	34%	+12%
Connecticut Business Development Characteristics (Avg. % T2B)	43%	32%	+11%

Thank You!



Reveal Your Customer's Full Experience

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