

H2R Market Research

Reveal Your Customer's Full Experience

Connecticut Office of Tourism 2018 Brand Awareness Research

Delivered December 2018

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Methodology

- The 2018 Brand Awareness Study was conducted in November 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 (334n), Massachusetts (340n), New Hampshire (268n), New Jersey (282n), New York (288n), Pennsylvania (304n), Rhode Island (251n) and Vermont (133n). Results from each market were 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

- COT's 2018 Marketing Communications Campaign had a positive impact in a variety of ways. Perhaps most importantly, Connecticut has begun to win back the hearts and minds of regional travelers. While brand awareness continued to edge lower, the state's brand perception as a travel destination improved for the first time in several years. That is, Connecticut's brand attributes, brand descriptors and business development characteristics all exhibited net increases in 2018 which is a good start. Likewise, interest in visiting Connecticut improved even though intent continued to decline.
- Those travelers reached by Connecticut's marketing messages are also beginning to take positive actions toward visiting. In fact, improvements were recorded in four out of five positive actions tracked. The most encouraging was the six-point increase in the number of ad-aware travelers indicating they are "planning a trip to the state in the next 12 months as a result of seeing the ads."
- Most leading indicators showed improvement in 2018. But, competition for the travel dollar is fierce, and Connecticut remains at the bottom of the list of many brand health metrics. And, with continued budget pressures, it probably comes as no surprise that some of the lagging indicators have plateaued.



Connecticut Brand Perception Improved

- Connecticut's aided brand awareness among overall New England travelers remained relatively flat in 2018 at 59%, down slightly from last year. But, while aided brand awareness edged lower again, unaided top-of-mind brand awareness increased by nearly a percentage point to 6%.
- Likewise, interest in visiting Connecticut increased by four points among overall travelers (40%) and it pushed six points higher among those travelers in the state's primary target market (43%). This was the first uptick in interest that has been recorded since 2016, so the improvement is encouraging.
- More importantly, New England travelers' perception of Connecticut improved by nearly three percentage points in average brand attributes, in brand descriptors and in business development criteria.
- And, once again, it was those travelers who recalled seeing/reading marketing messages for Connecticut who drove the state's positive brand perception.



Positive Indicators Abound

- In addition to recording positive shifts in Connecticut's brand perception, this past year's COT marketing campaign also delivered improvement in consideration of Connecticut as a place to visit.
- Nearly 23% of those reached by Connecticut's marketing message indicated they are "planning to visit the state in the next year as a result of seeing/reading the ads," up six percentage points from last year.
- Similarly, 18% of ad-aware travelers indicated they reached out to at least one destination or attraction after seeing/reading an ad, up four points from last year.
- Overall, four out of five positive traveler actions that are tracked annually posted increases this year among aware travelers—indicating that the outlook for Connecticut tourism remains strong.



Marketing Results are Positive

- Clearly, Connecticut's marketing efforts are doing a good job of beginning to win back the hearts and minds of travelers across New England. But, while these leading indicators are beginning to look a bit better than they had over the past few years, the state's lagging indicators appear to have peaked.
- Despite several years of declining brand awareness, interest in visiting and market reach; Connecticut had managed to deliver efficient and effective marketing campaigns by deploying research-driven insights and technology that precisely targeted travelers and delivered outstanding results. And, the same was true once again in 2018.
- Let's be clear, this was a very good year with very strong results. But, it was also the first year in quite awhile that the state's lagging indicators were even just slightly less impressive than the previous year. No, the sky is not falling. Results remain quite good. But, make no mistake, a warning shot has been fired over the bow, and it is time to take notice.



2018 Marketing Campaign Delivered

- Nearly one in six New England travelers recalled seeing or reading at least one of Connecticut's targeted marketing messages. Extrapolated across the target market, this equated to a market reach of nearly three million travel households which COT reached at a cost of \$0.71 per aware travel household. And, for context, anything below \$1.00 per household is considered good.
- But, market reach was lower than it was in 2017 and the cost per aware travel household was slightly higher.
- The marketing campaign was very effective at reaching target travelers and persuading them to visit Connecticut. Just not quite as effective as it was last year. Incidence of visitation among marketing-aware travelers was nearly six percentage points higher than it was among the control group of travelers who were not exposed to the marketing communications this year. This gain delivered nearly 170k incremental trips to the state that would not have otherwise occurred if not for the marketing communications campaign. But, incremental visitation was smaller than it was last year (292k).



Brand Health Holds Steady

- The good news is that Connecticut's overarching brand health remains as strong as ever. Incidence of visitation edged upwards in 2018 (10%), as travelers were somewhat more regional. Average distance traveled declined to 119 miles from 120 miles.
- Likewise, the state's market potential continued hovering at 54%, the same as last year. Market potential is defined here as the sum of Considerers (9%), Lapsed Visitors (19%) and Recent Visitors (26%) to the state.
- Additionally, both Connecticut's conversion (46%) of its market potential and retention (54%) of past visitors both scored well above the H2R Norm for destinations with regional campaigns (32% and 44%, respectively).
- Lastly, market upside continues to be quite strong for Connecticut as the Visitor Growth Indicator (VGI) averaged 270 this past year—indicating that the state's potential visitation is more than double the size of its current market share. Thus, if enough travelers can be reached, there is an ample pool of considerers to help drive the state's visitation upward.



Key Performance Indicators

| KPI Metric | 2018 | 2017 | Var |
|---|--------|--------|---------|
| Aided Brand Awareness | 59.3% | 59.7% | -0.4% |
| Interest in Visiting Connecticut | 40.3% | 36.3% | +4.0% |
| Intent to Visit Connecticut | 35.6% | 38.6% | -3.0% |
| Average %T2B – Connecticut Brand Attributes | 45.7% | 43.2% | +2.5% |
| Average %T2B – Connecticut Brand Descriptors | 42.8% | 40.2% | +2.6% |
| Average %T2B – Connecticut Business Development Ratings | 40.3% | 37.5% | +2.9% |
| Marketing Message Awareness | 17.2% | 19.8% | -2.6% |
| Unique Market Reach | 2.83M | 3.58M | -0.75k |
| Cost per Aware Travel Household | \$0.71 | \$0.61 | +\$0.10 |
| Incremental Conversion | 5.9% | 8.2% | -2.3% |
| Incremental Visits | 168k | 292k | -124k |
| % Planning to Visit Connecticut as Result of Seeing Ads (Aware Travelers) | 22.5% | 16.7% | +5.8% |

Key Performance Indicators – Target Market

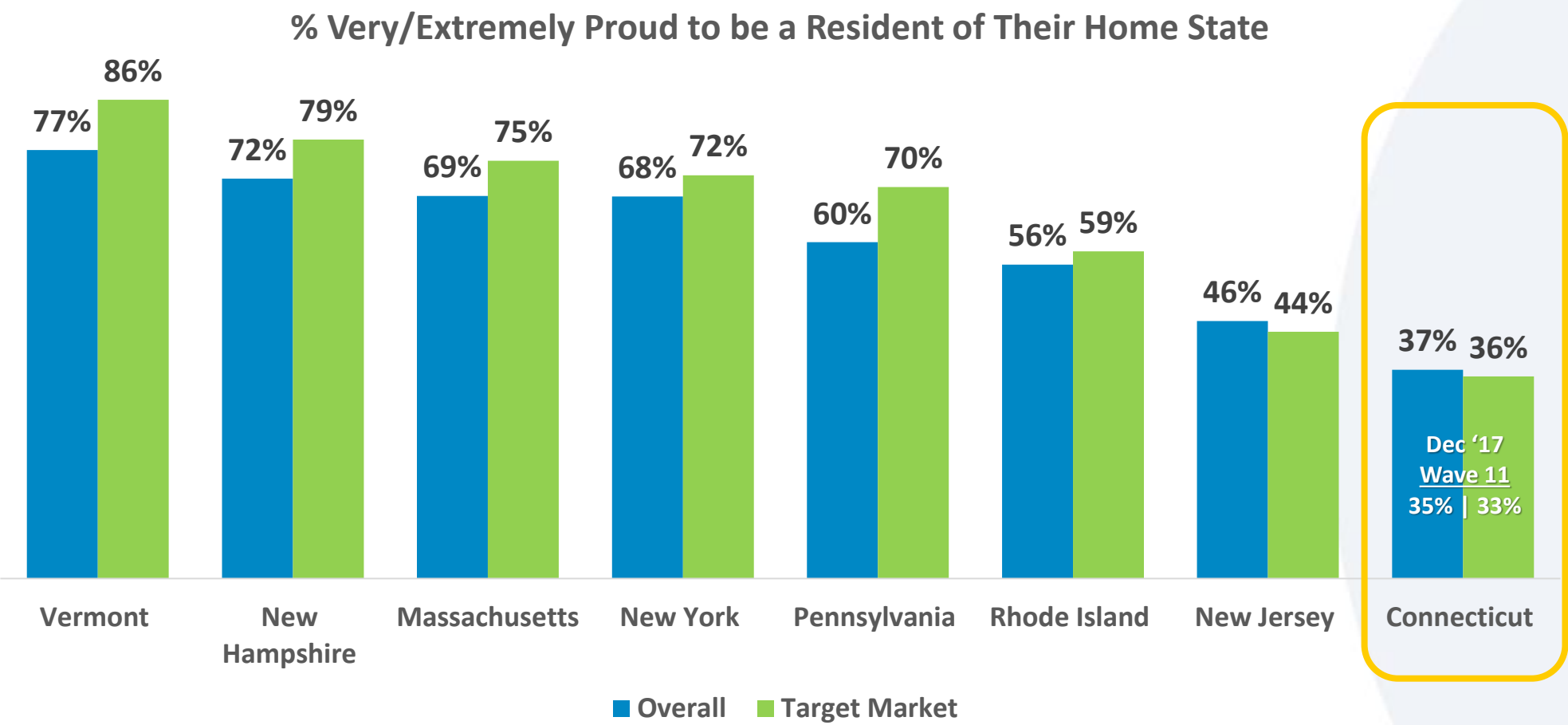
| KPI Metric – Target Market | May '12 Wave 1 | Sep '12 Wave 2 | Nov '12 Wave 3 | Sep '13 Wave 4 | Apr '14 Wave 5 | Sep '14 Wave 6 | Nov '14 Wave 7 | Sep '15 Wave 8 | Apr '16 Wave 9 | Sep '16 Wave 10 | Dec '17 Wave 11 | Nov '18 Wave 12 |
|---|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|--------------------|--------------------|--------------------|
| Visited Connecticut in Past 5 Years | n/a | n/a | n/a | n/a | 43% | 38% | 39% | 34% | 30% | 36% | 38% | 29% |
| Aided Brand Awareness | 54% | 64% | 59% | 60% | n/a | n/a | 74% | 40% | 64% | 64% | 62% | 57% |
| Interest in Visiting Connecticut | 56% | 64% | 59% | 61% | 49% | 66% | 52% | 63% | 37% | 43% | 37% | 43% |
| Intent to Visit Connecticut | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | 45% | 48% |
| Average %T2B – Connecticut Brand Attributes | n/a | n/a | n/a | n/a | 51% | 57% | 47% | 58% | 47% | 49% | 43% | 50% |
| Average %T2B – Connecticut Brand Descriptors | n/a | n/a | n/a | n/a | 47% | 50% | 39% | 53% | 41% | 44% | 40% | 47% |
| Average %T2B – Connecticut Business Development Ratings | 33% | 37% | 31% | 34% | 43% | 46% | 36% | 50% | 39% | 41% | 36% | 44% |
| Marketing Message Awareness | 17% | 29% | 23% | 27% | 28% | 35% | 24% | 25% | 18% | 29% | 17% | 13% |
| % Planning to Visit Connecticut as Result of Seeing Ads | n/a | 20% | 12% | 19% | n/a | 26% | 25% | 31% | 31% | 20% | 11% | 16% |
| <u>Ads Make me Think Connecticut...</u> | | | | | | | | | | | | |
| Is a great place to go for a short getaway | n/a | n/a | n/a | n/a | 90% | 87% | 84% | 82% | 87% | 81% | 82% | 72% |
| Has a lot to do | n/a | n/a | n/a | n/a | 79% | 80% | 77% | 73% | 83% | 71% | 66% | 64% |
| Is a great place to spend time with my family | n/a | n/a | n/a | n/a | 81% | 81% | 77% | 79% | 86% | 76% | 70% | 71% |

Note: Unique Market Reach, Cost per Aware Travel Household and Incremental Conversion is only available for Waves 10-12, and only among overarching travelers; not the target market.

Brand Perception

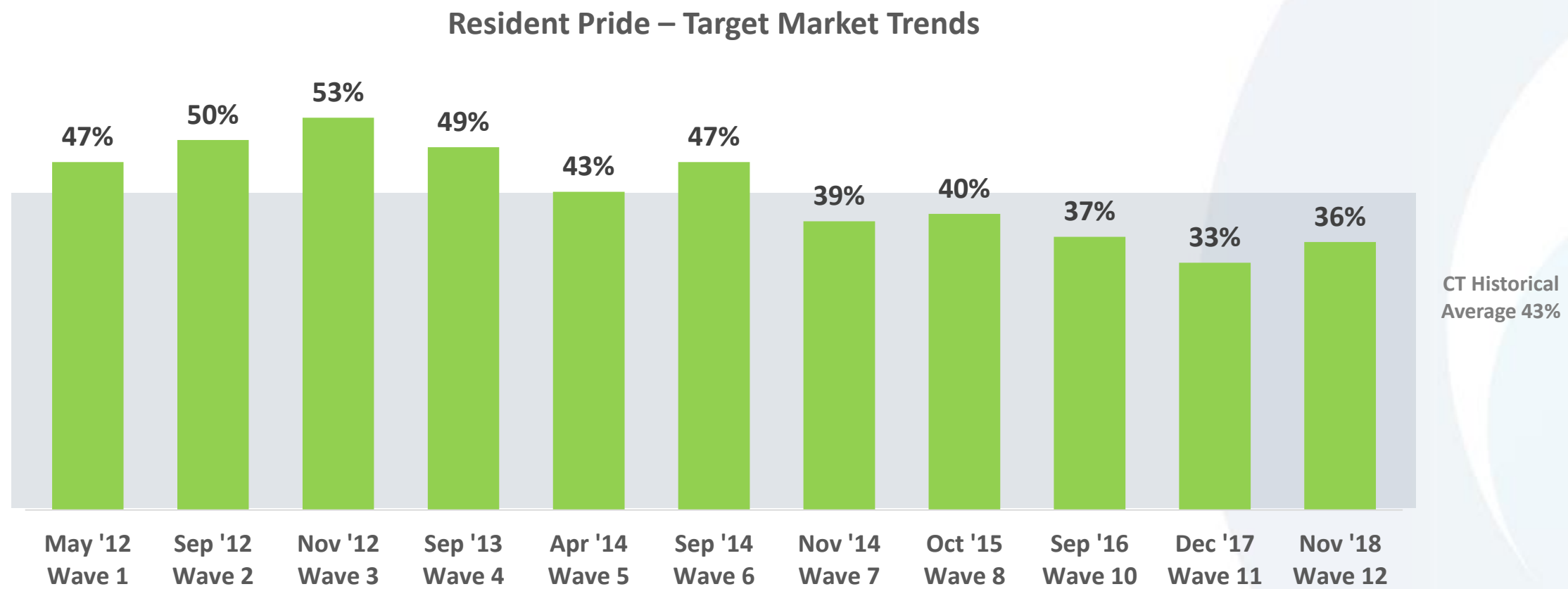
01

Resident pride increased overall and among target market travelers but continues to trail other state residents in the Northeast.



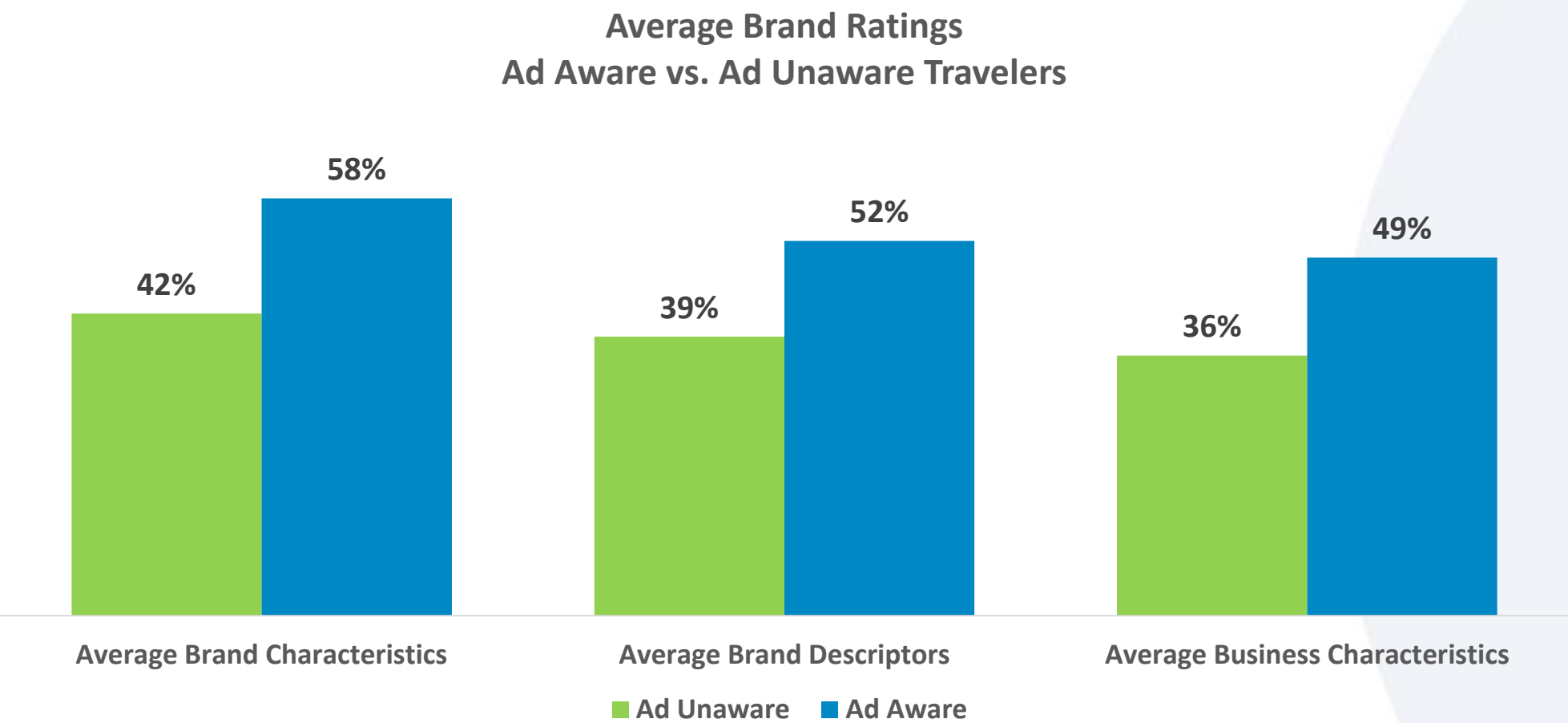
Q14: How proud do you feel about being a resident of your state? (5-pt. scale)

Resident pride experienced a rebound this year due in part to a strong marketing campaign and fewer negative news stories about the state unrelated to travel and tourism.



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

On average, marketing continues to have a large and positive impact on the Connecticut brand. Brand ratings among ad aware travelers scored significantly higher than those unaware of the ads.



Connecticut’s top brand characteristics continue to be its beautiful foliage, beautiful scenery and interesting small towns to explore.



68% | 66%

Beautiful Fall Foliage



65% | 61%

Beautiful Scenery



62% | 60%

Small Towns

■ 2017 ■ 2018

Q28: 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: Year Over Year Comparisons

| Describes CT well/extremely well | 2017 | 2018 | | 2017 | 2018 |
|--|------|-------|---|------|-------|
| Has beautiful fall foliage | 68% | 66% | Is a good place for hiking/biking | 44% | 45% |
| Offers beautiful scenery | 65% | 61% ▼ | Has great antiques | 42% | 45% ▲ |
| Has interesting small towns to explore | 62% | 60% | Has nice resorts/spas | 40% | 45% ▲ |
| Offers a sense of history as part of the landscape | 53% | 55% | Offers a romantic escape | 44% | 43% |
| Offers casino entertainment | 48% | 54% ▲ | Offers great culinary experiences | 39% | 43% ▲ |
| Has lots of historic sites to visit | 53% | 53% | Has great shopping | 41% | 43% |
| Great place to rest and relax | 55% | 53% | Is a good place for fishing | 36% | 41% ▲ |
| Offers great inns/B&Bs | 46% | 51% ▲ | Great place to spend time with children | 39% | 41% |
| Has lots of things to see and do | 47% | 50% ▲ | Offers a good value for the money | 36% | 39% ▲ |
| Has winter activities | 46% | 49% ▲ | Has vineyards/wineries | 34% | 38% ▲ |
| Great place to spend time with my spouse | 49% | 48% | Has great beaches | 29% | 38% ▲ |
| Has friendly, welcoming people | 47% | 47% | Offers "pick your own" farms | 35% | 37% ▲ |
| Is a good place for boating | 40% | 46% ▲ | Offers action/adventure sports | 29% | 35% ▲ |
| Offers arts and culture | 43% | 46% ▲ | Has great theatre | 24% | 35% ▲ |
| Is a fun destination | 46% | 46% | Offers exciting nightlife | 29% | 33% ▲ |
| Great place to spend time with my friends | 46% | 46% | Good place for golfing | 27% | 33% ▲ |

Q28: 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.

▼▲ Denotes a statistically significant variance to 2017 scores.

Travelers are most likely to associate Connecticut with words/phrases such as Historical, Close By and Traditional.



60% | 60%
Historical



55% | 56%
Close By



55% | 53%
Traditional

■ 2017 ■ 2018

Q29: 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 – Year Over Year Comparisons

| Describes CT well/extremely well | 2017 | 2018 | | 2017 | 2018 |
|----------------------------------|------|-------|---------------|------|-------|
| Historical | 60% | 60% | Contemporary | 35% | 41% ▲ |
| Close by | 55% | 56% | Fresh | 38% | 40% ▲ |
| Traditional | 55% | 53% | Artsy | 36% | 40% ▲ |
| Quaint | 52% | 52% | Diverse | 35% | 39% ▲ |
| Clean | 57% | 52% ▼ | Revolutionary | 31% | 38% ▲ |
| Upscale | 50% | 50% | Vibrant | 32% | 38% ▲ |
| Nature-oriented | 47% | 48% | Exciting | 34% | 37% ▲ |
| Welcoming | 49% | 48% | Inspiring | 34% | 37% ▲ |
| Authentic | n/a | 48% | Trendy | 30% | 36% ▲ |
| Friendly | 50% | 47% ▼ | Affordable | 33% | 36% ▲ |
| Cultural | 44% | 46% | Pretentious | 30% | 34% ▲ |
| Fun | 45% | 46% | Innovate | 27% | 33% ▲ |
| Sophisticated | 41% | 44% ▲ | Bold | 23% | 30% ▲ |
| Smart | 40% | 42% | Unexpected | 22% | 29% ▲ |
| Down-to-earth | 41% | 42% | | | |

Q29: 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.

▼▲ Denotes a statistically significant variance to 2017 scores.

New England travelers 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.



54% | **52%**

Good Quality of Life



51% | **50%**

Lots of Educated People for Hiring



49% | **47%**

Great Place to Raise a Family

■ 2017 ■ 2018

Q30: 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 – Year Over Year Comparisons

| Describes CT well/extremely well | 2017 | 2018 |
|---|------|-------|
| A place with a good quality of life | 54% | 52% |
| Has lots of educated people if you are hiring | 51% | 50% |
| Great place to have kids and raise a family | 49% | 47% |
| Great place to live | 45% | 46% |
| A progressive state | 40% | 46% ▲ |
| Place with creative people | 41% | 43% ▲ |
| A great place to meet interesting people | 42% | 43% |
| State with lots of diversity | 35% | 40% ▲ |
| Place with innovative people | 34% | 40% ▲ |
| Great place to work | 35% | 39% ▲ |
| Friendly to businesses | 35% | 39% ▲ |
| A state with a lot of growth | 35% | 38% ▲ |
| Has lots of quality skilled labor if you are hiring | 37% | 37% |
| A place of ingenuity | 30% | 37% ▲ |
| Great place for innovation | 31% | 36% ▲ |
| A great place for businesses to network | 33% | 36% ▲ |
| A dynamic, innovative state | 32% | 36% ▲ |
| Great place to relocate an existing business | 29% | 33% ▲ |
| A place you can get things done quickly | 32% | 33% |
| Great place to start up a business | 29% | 33% ▲ |

Q30: 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)

▲ Denotes a statistically significant variance to 2017 scores.

Choice drivers like culinary experiences (+6 pts) and the sense of history (+5 pts) experienced significant increases this year.

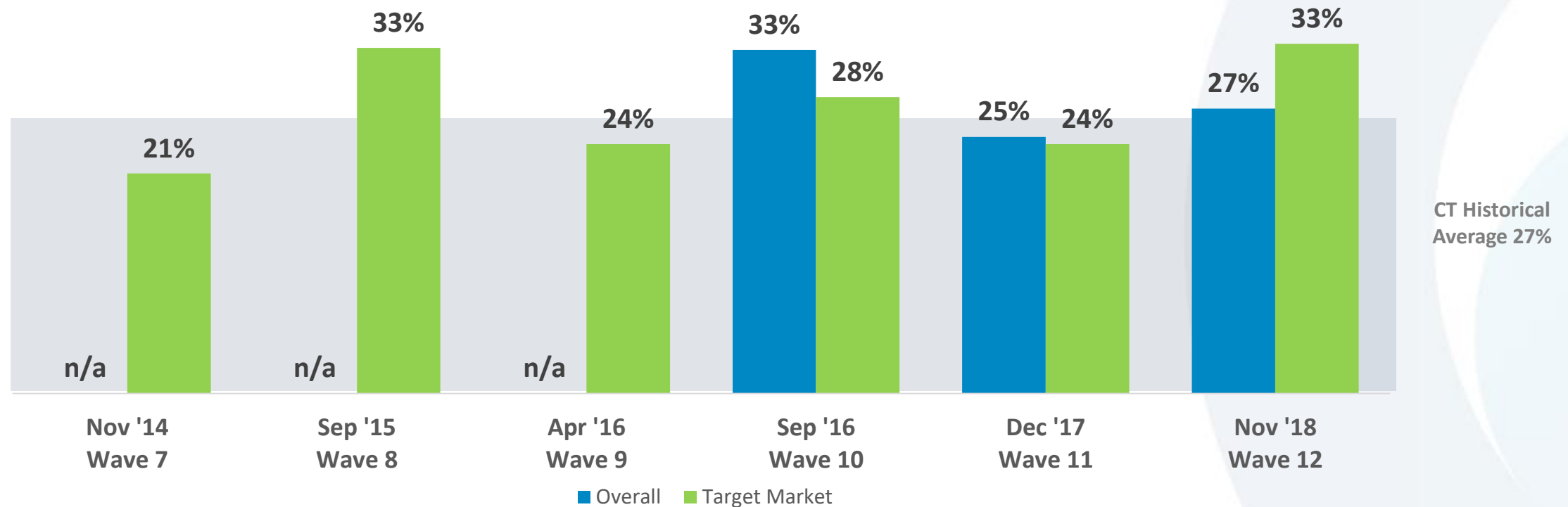
Characteristics with Highest Correlations with Interest in Visiting



Q29: 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.

One-third of target market travelers believe that Connecticut is unique in comparison to other Northeastern states—up over last year.

% Believe Connecticut is Very/Extremely Unique in the Northeast



Key Performance Indicators

02

Key Performance Indicators



Overall Aided Brand
Awareness (59%)
(+1 Point)

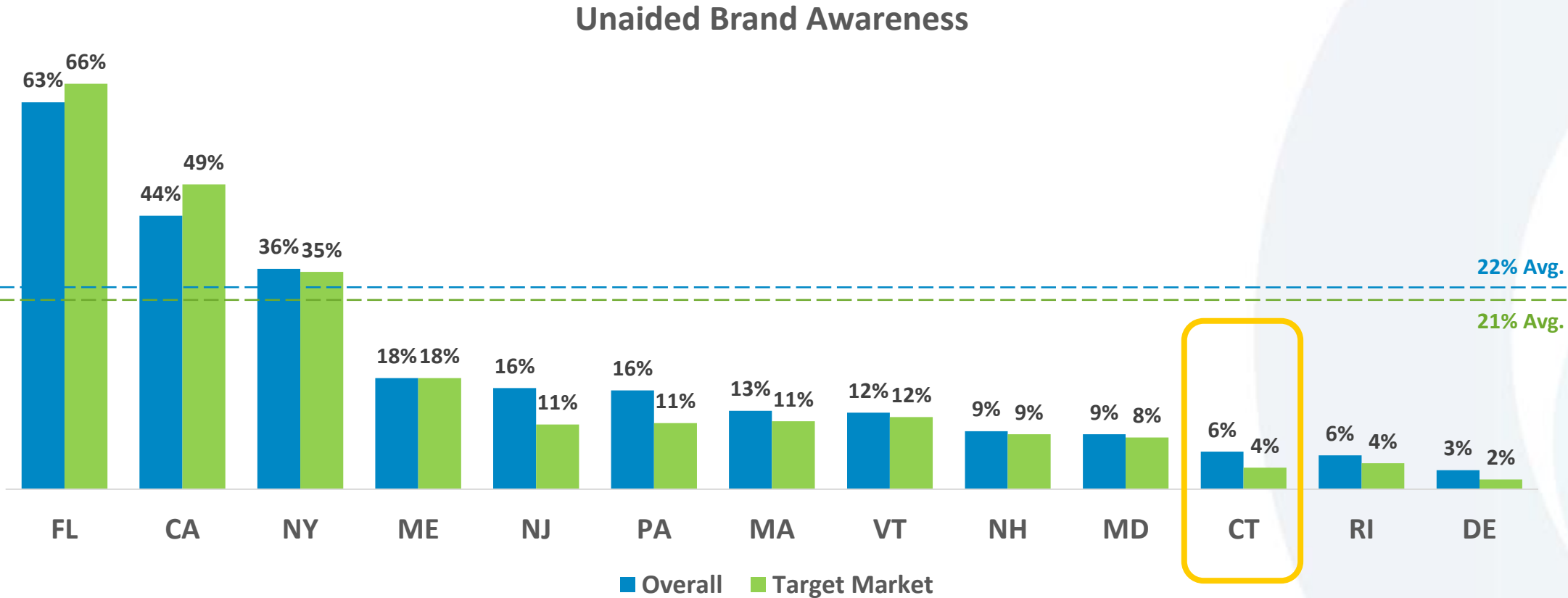


Overall Unaided Brand
Awareness (6%)
(+1 Point)



23% of Marketing Aware
Travelers “Plan to Visit
Connecticut As a Result of
Seeing an Ad”
(+6 Points)

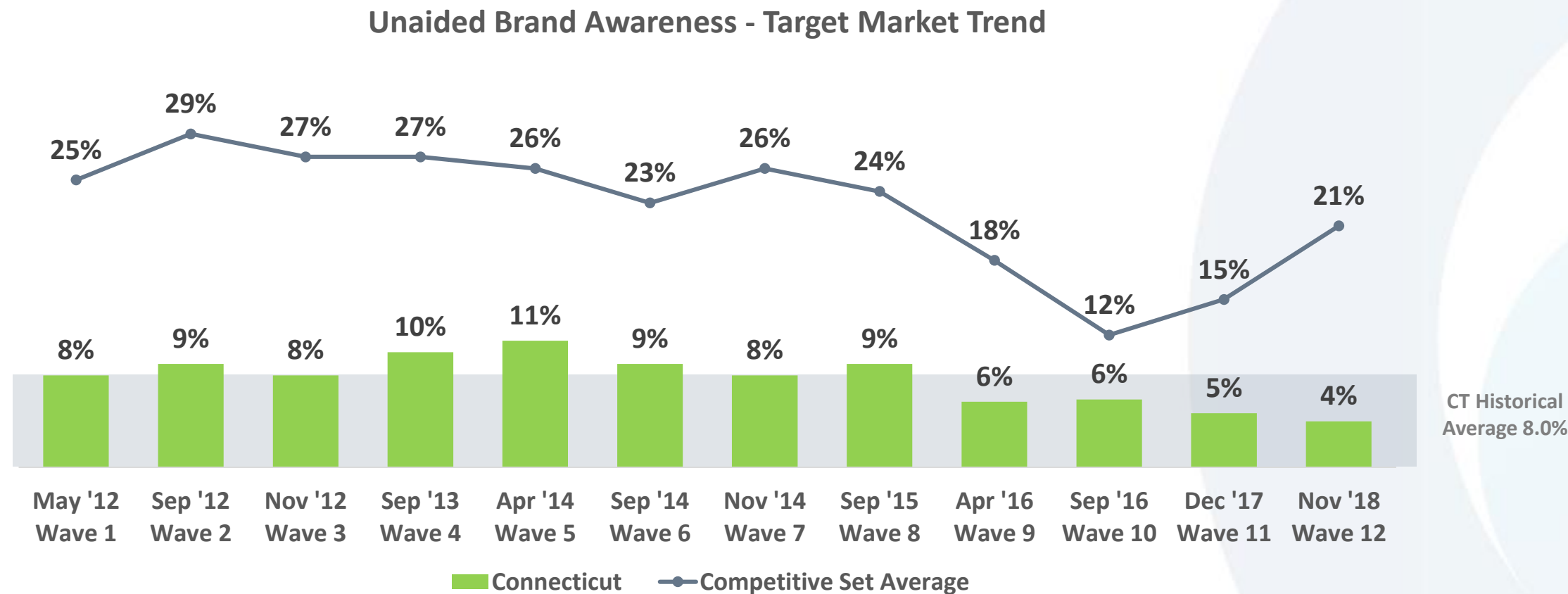
Fewer than one in ten travelers exhibit unaided brand awareness of Connecticut as a place to visit.



Q8: When you think about places to visit or travel to, please type the first STATE that comes to mind in the space below. Q9: And, what other STATES do you think of as places to visit or travel to?

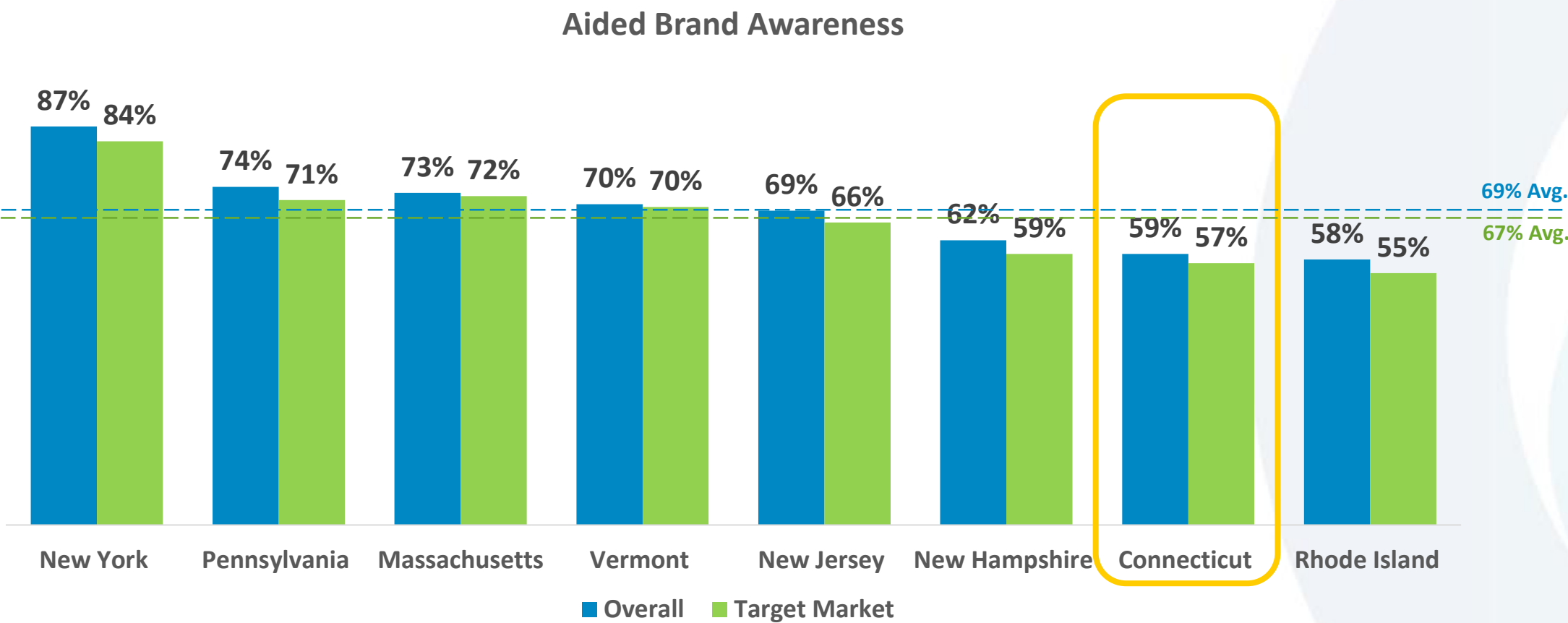
*Target Market is a set of travelers who are 25-65 years old and earn a household income of \$75,000+

Unaided brand awareness among the target market was on par with 2017, while awareness of others in the competitive set increased by an average of six percentage points this past year.



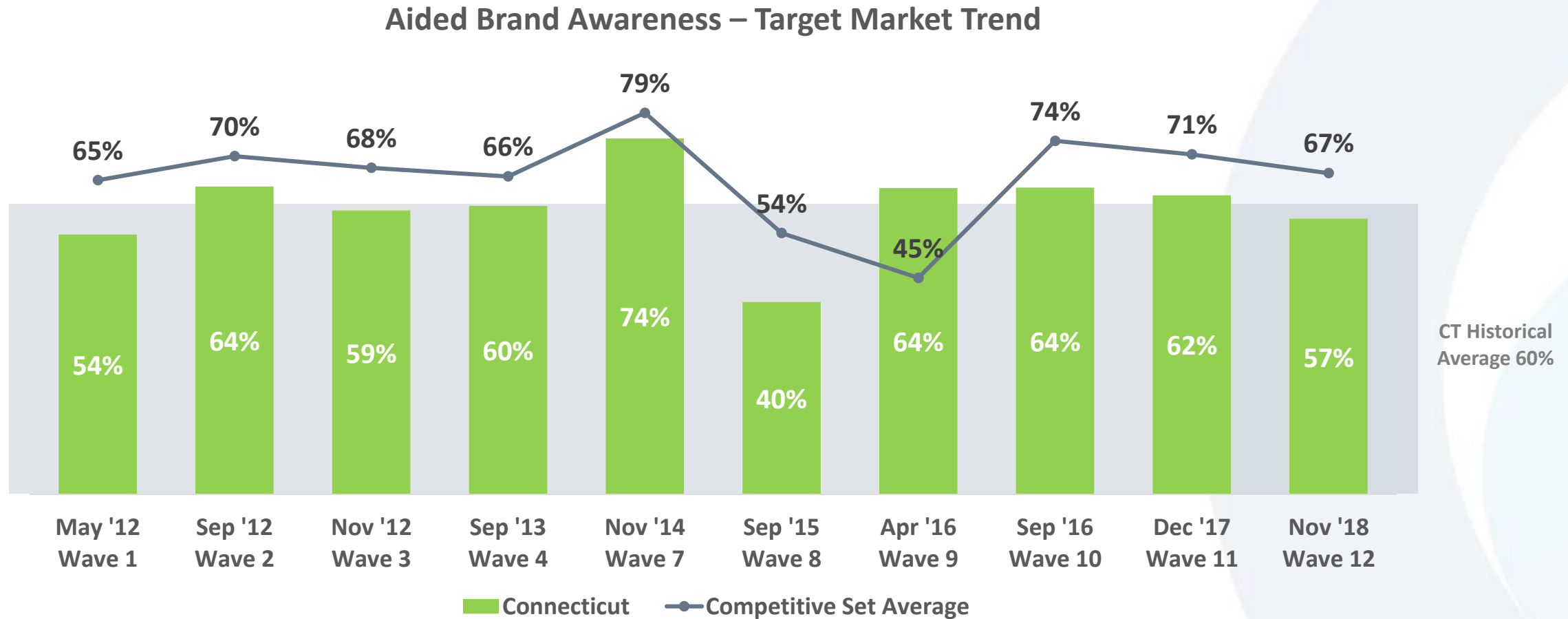
Q8: When you think about places to visit or travel to, please type the first STATE that comes to mind in the space below.
Q9: And, what other STATES do you think of as places to visit or travel to?

Nearly six in ten travelers are familiar with the state of Connecticut as a travel destination, on par with last year but it continues to trail other New England states.



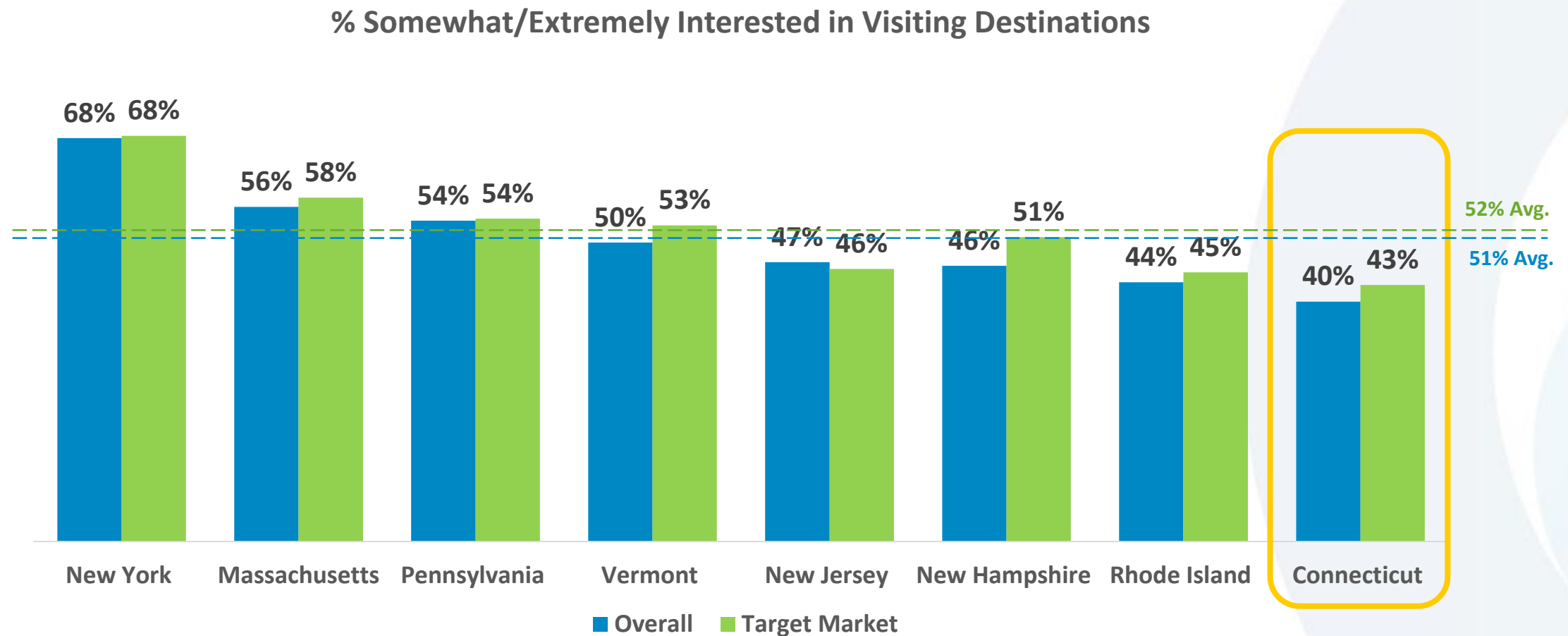
Q10: And, even if you just mentioned any of these states, which of the following STATES have you ever heard about as a place to visit or travel to? Select all that apply.

Awareness of Connecticut as a travel destination among the target market slipped by five points this year, in line with the four-point drop in awareness of the average competitive destination.

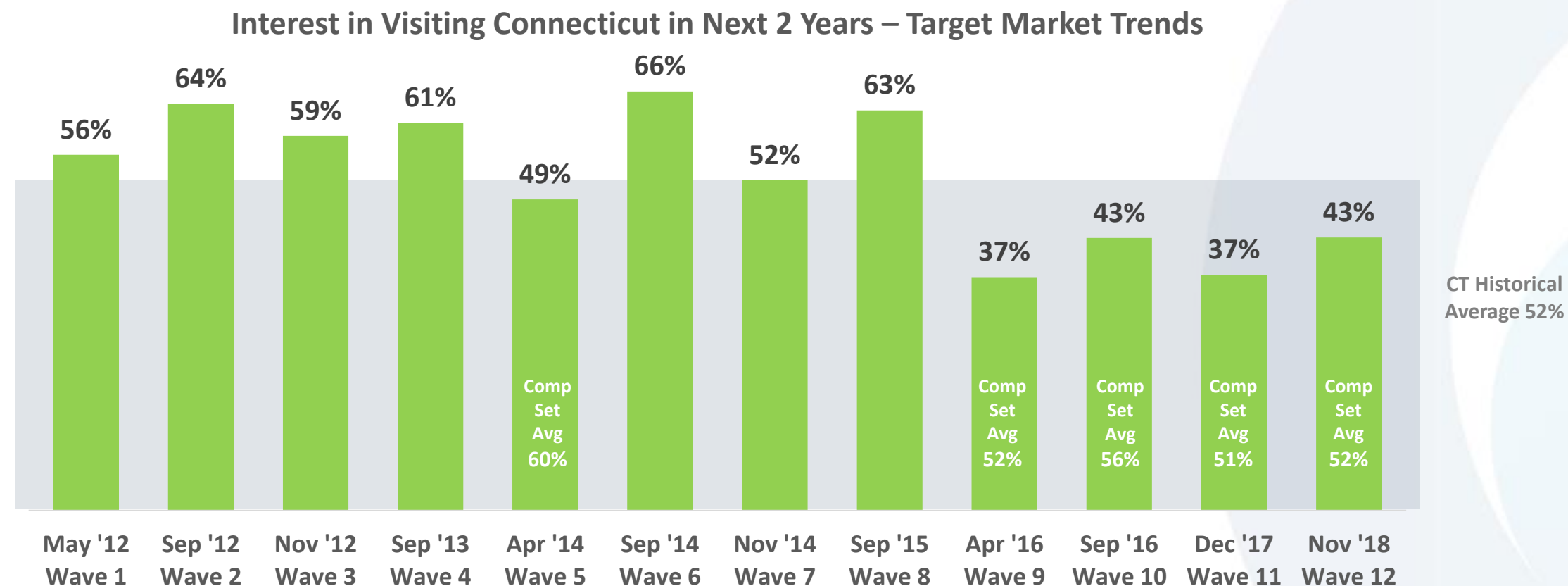


Q10: And, even if you just mentioned any of these states, which of the following STATES have you ever heard about as a place to visit or travel to? Select all that apply.

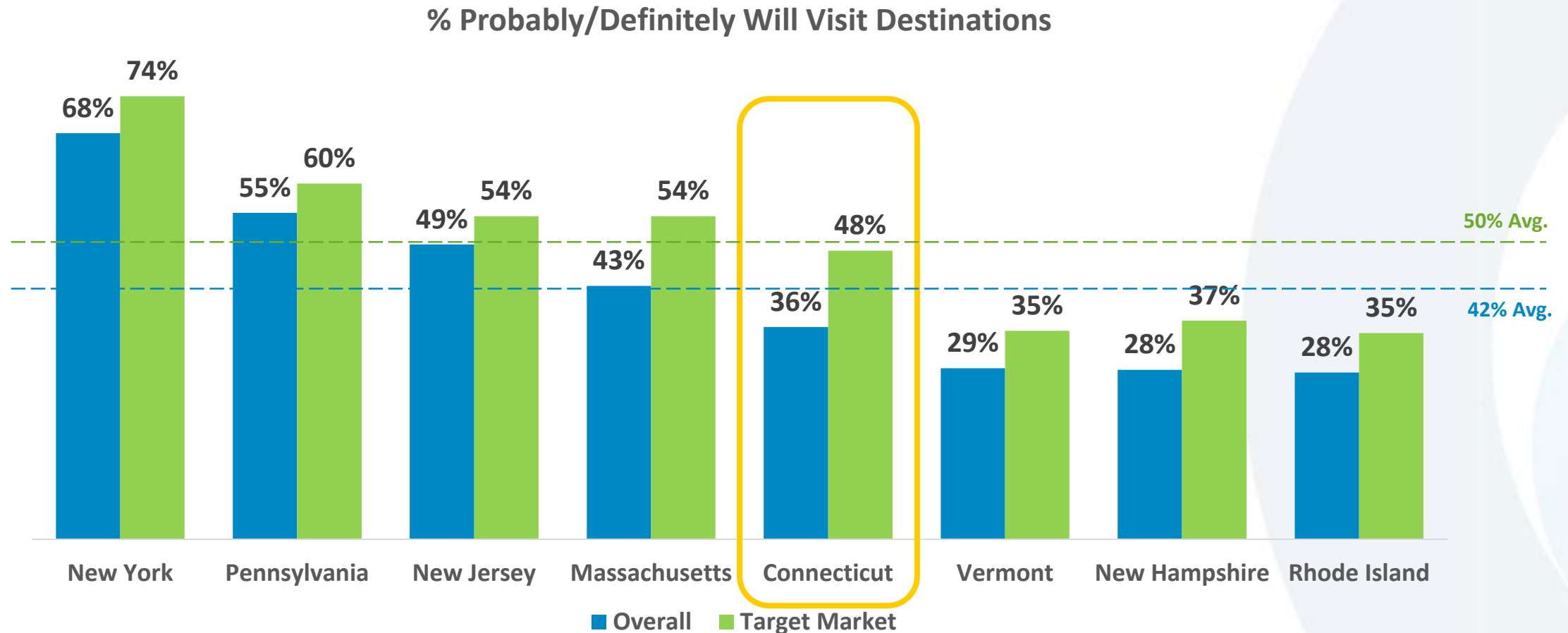
Four in ten travelers have an interest in visiting Connecticut in the next two years, up three points over last year.



Interest in visiting among the target market increased by six points. But, it remains nine points below the historical average.



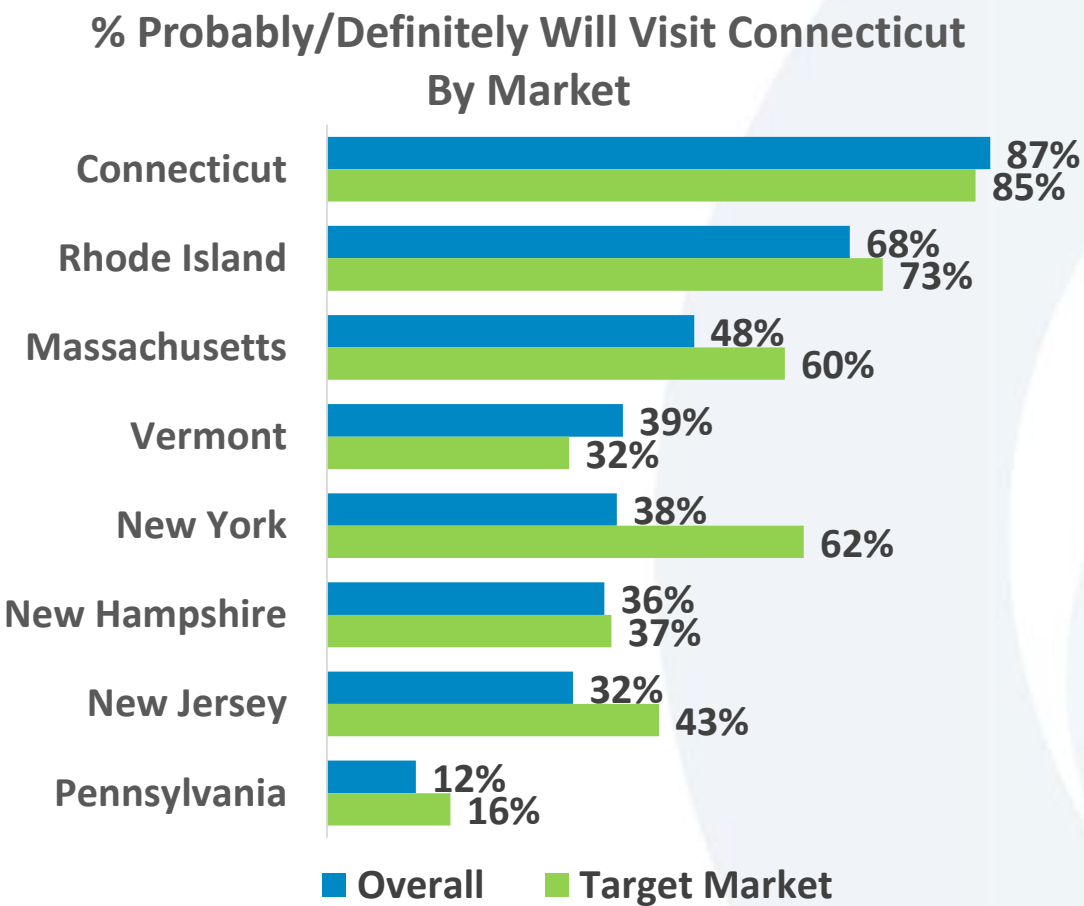
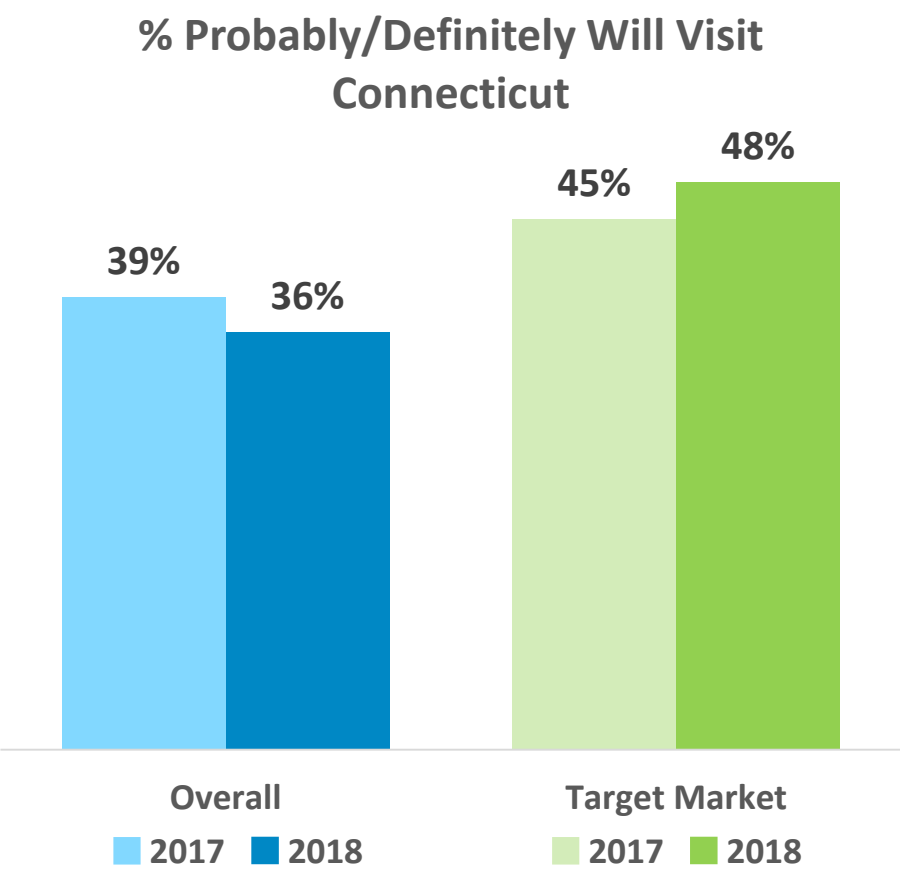
More than one-third of overall travelers intend to visit Connecticut in the next 12 months (-3 points from last year). Intent, however, runs 12 points higher among those in the target market.



Q16b: 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=2,200
TARGET MARKET RESPONDENTS | N=793

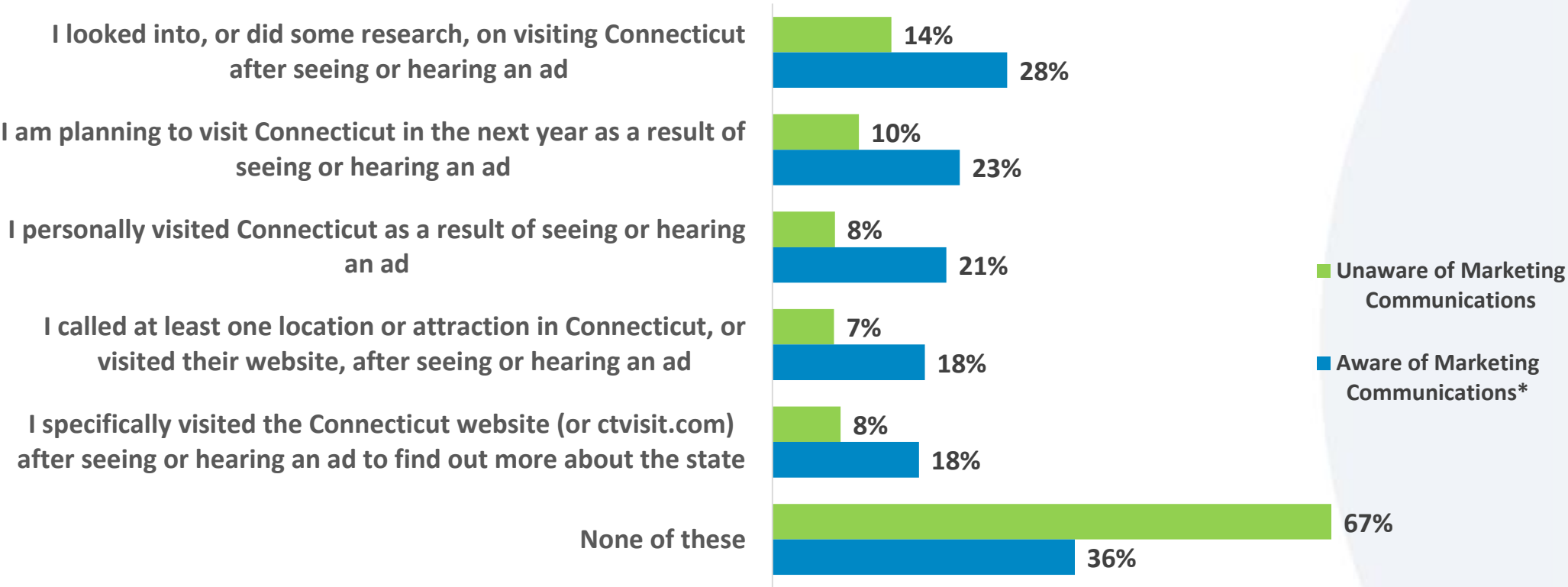
While intent to visit among overall travelers dropped by three points, intent among the target market is much higher and increased by three points this year.



Q16b: 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)

Travelers who were reached by Connecticut’s marketing messages were much more likely to take positive action (64%) than travelers who were not (33%).

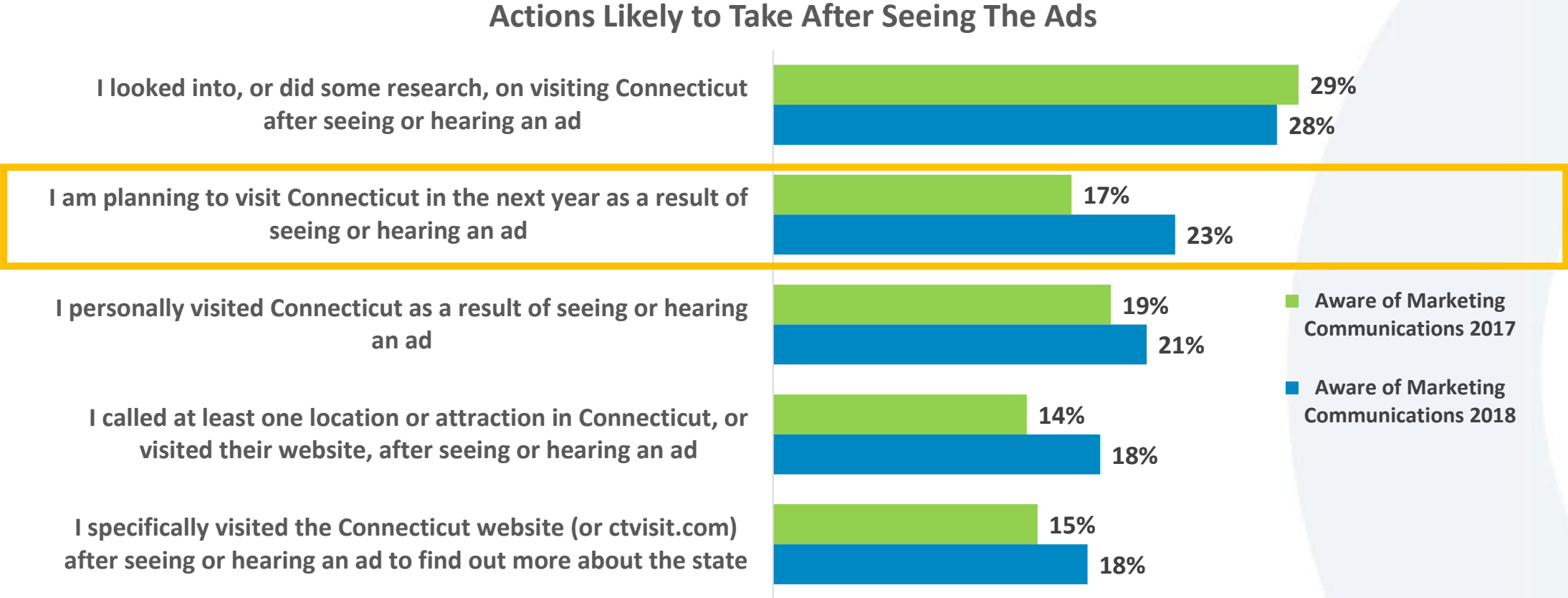
Actions Likely to Take After Seeing The Ads



**Aware travelers are those who selected Connecticut in Q14 – “...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 2018.”*

Q38: 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.

Furthermore, marketing aware travelers were much more likely than last year’s marketing aware travelers to take most positive actions—especially to visit as a result of seeing ads.



**Aware travelers are those who selected Connecticut in Q14 – “...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 2018.”*

Q38: 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

03

Brand Health KPIs



Market potential for CT's future visitation includes **54%** of travelers in the advertised markets



46% of travelers who are familiar with CT have **converted to visitors** in the past 5 years



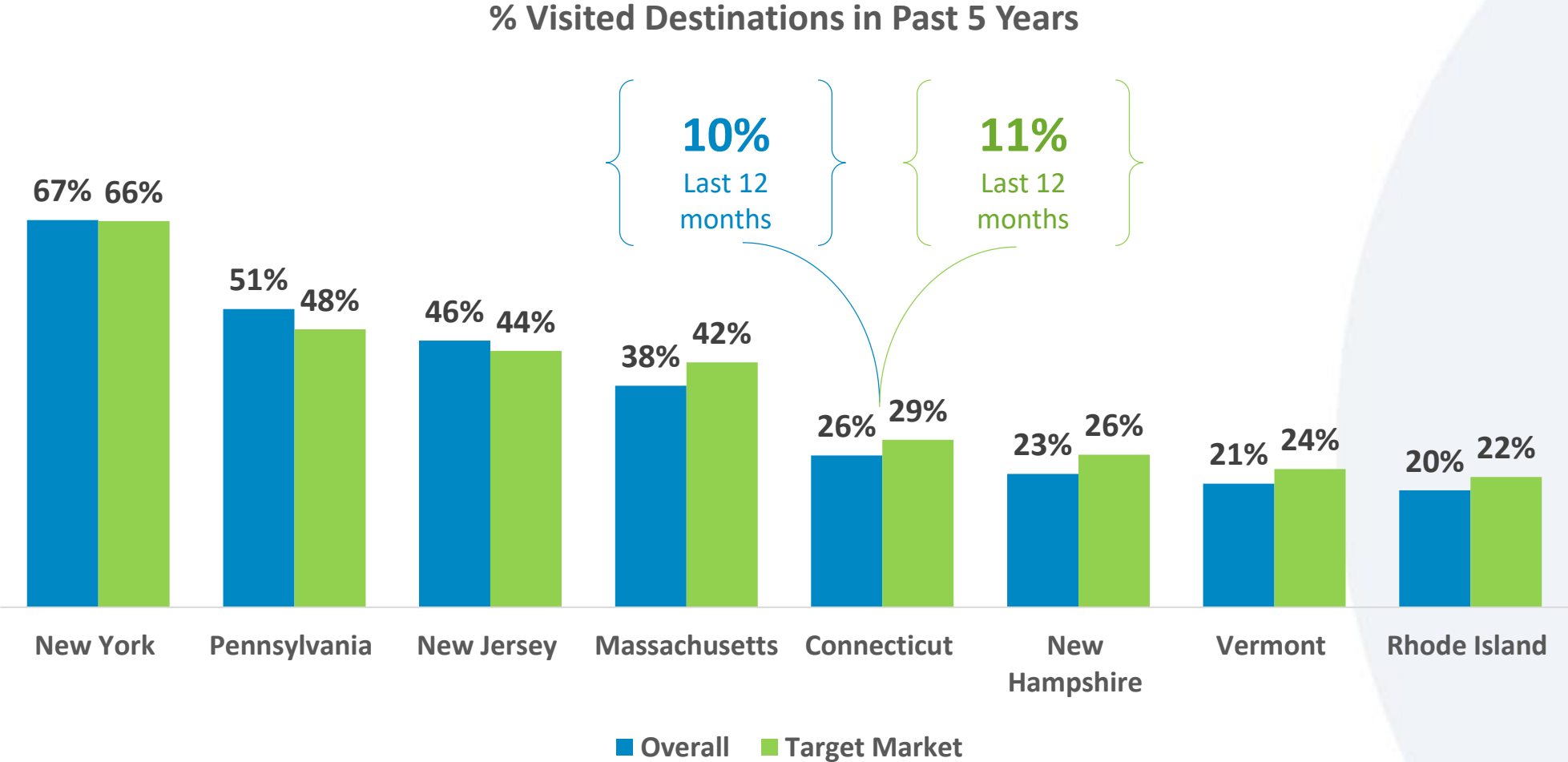
In the past 12 months, CT has **retained 54%** of its past visitors



Connecticut has a Visitor Growth Index* of **270** overall and **236** among the target market

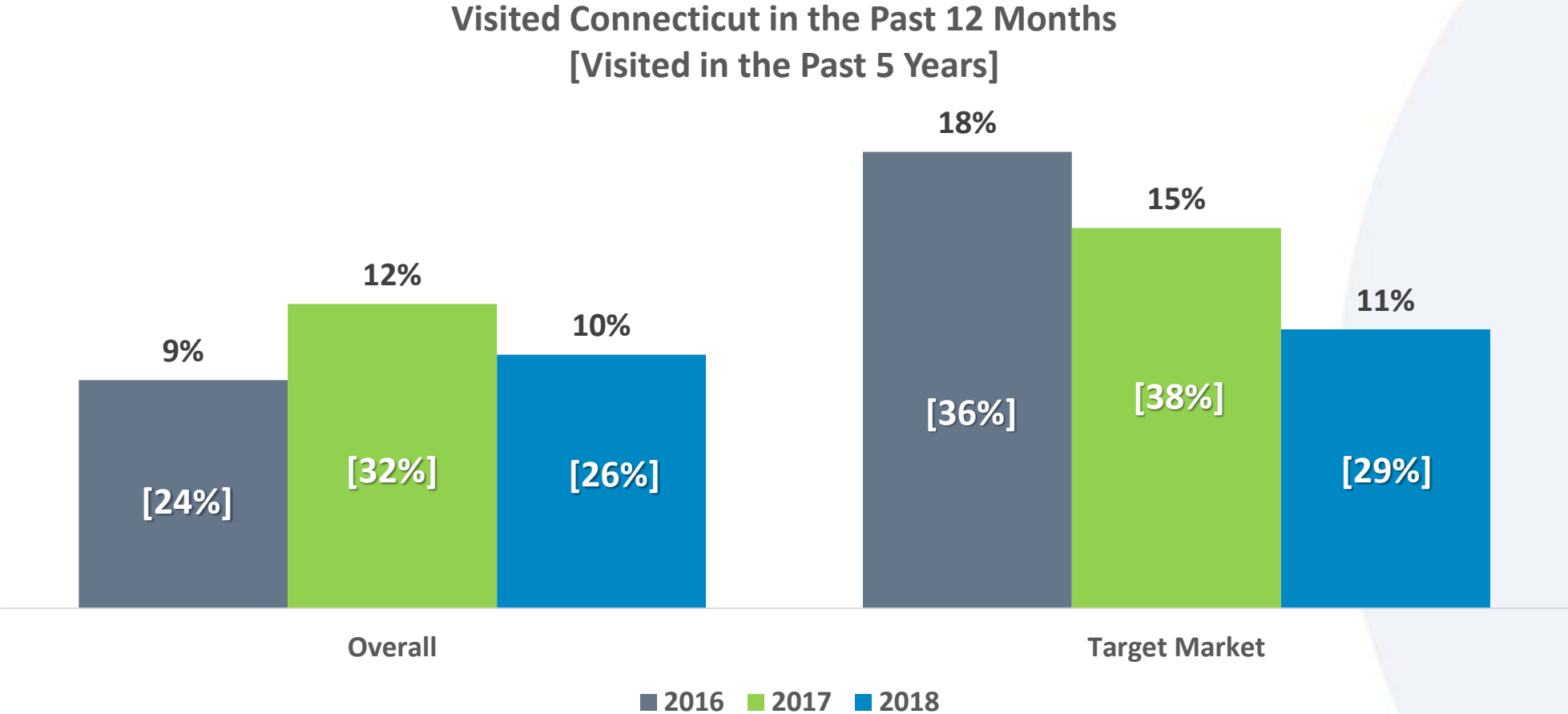
**Visitor Growth Index (VGI) is a tool that measures a destination's market potential relative to its current market share.*

More than one-fourth of travelers across New England have visited Connecticut in the past five years—10% of which were in the past 12 months.



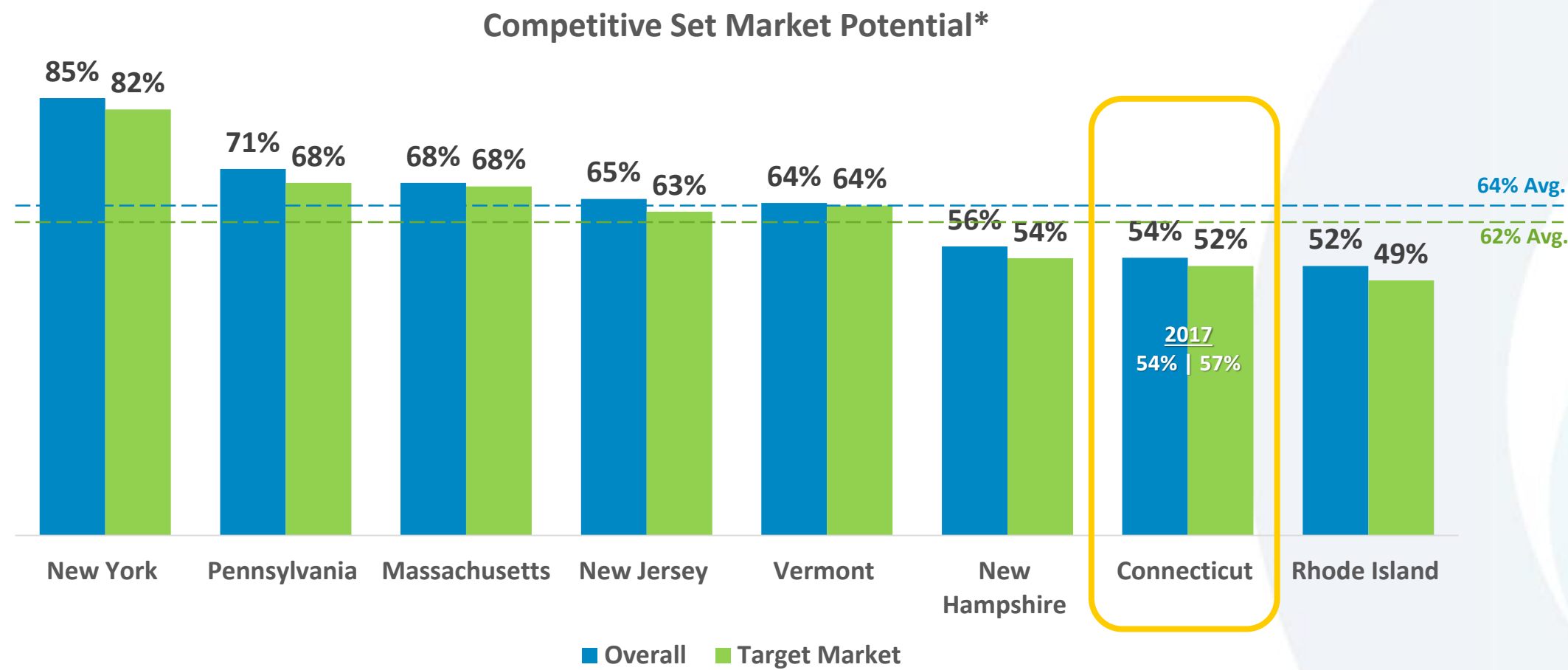
Q11: Using the scale provided, please indicate which of the following destinations have you visited for a getaway in the last five years? (5-pt. scale)

Visitation to Connecticut in the past five years dropped significantly, as did visitation in the past year among all travelers and Target Market travelers.



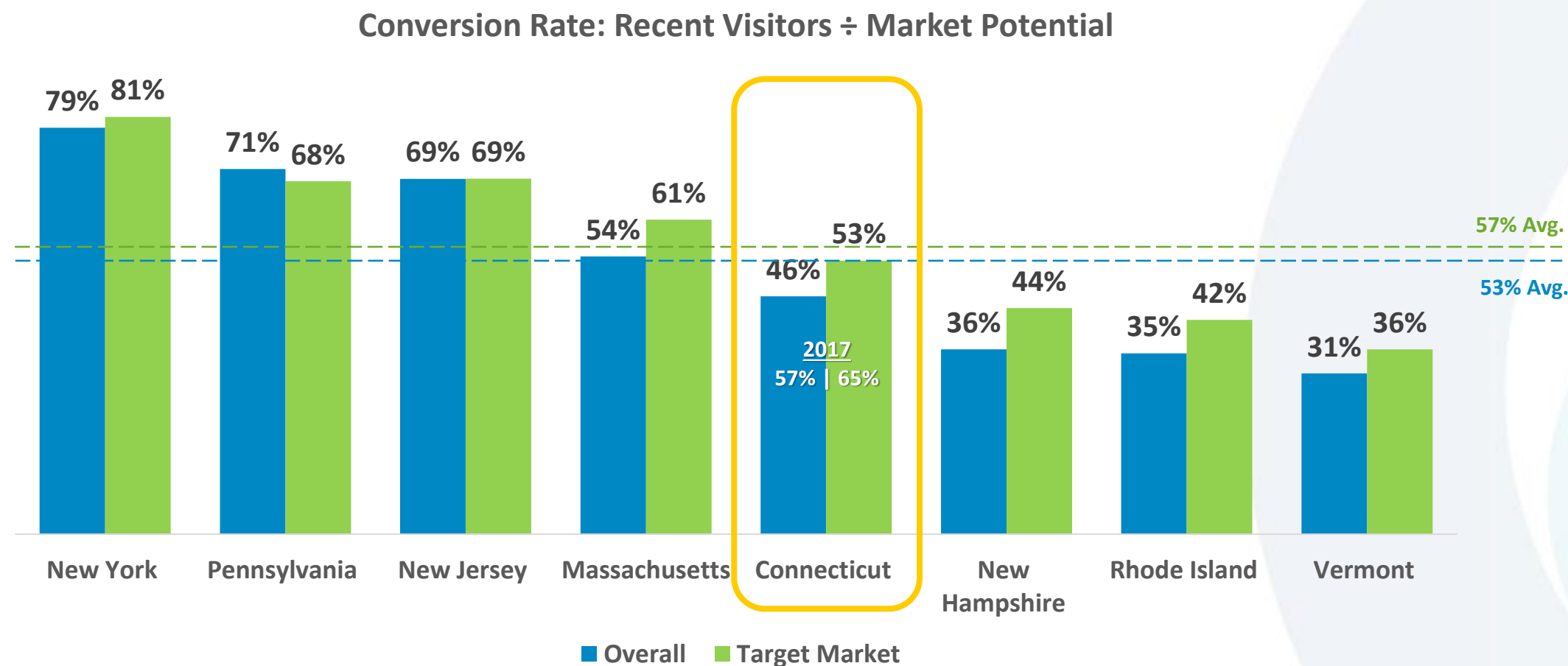
Q11: Using the scale provided, please indicate which of the following destinations have you visited for a getaway in the last five years? (5-pt. scale)

Connecticut's market potential includes 54% of New England travelers, on par with last year.



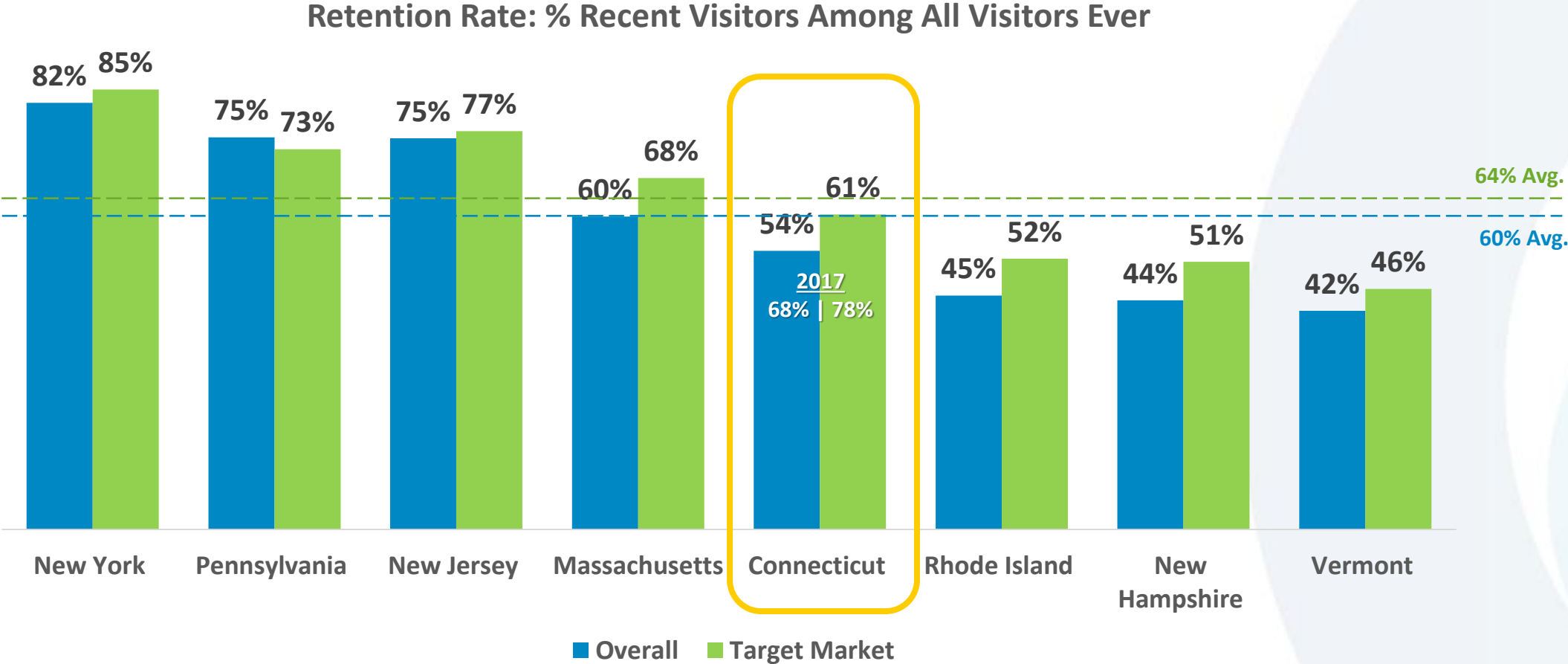
Q11: Using the scale provided, please indicate which of the following destinations have you visited for a getaway in the last five years? (5-pt. scale)
*Market Potential is the combination of considerers, lapsed visitors and recent visitors to a destination.

Connecticut converted 46% of its market potential in the past five years, much higher than the H2R Norm for conversion at 32%.



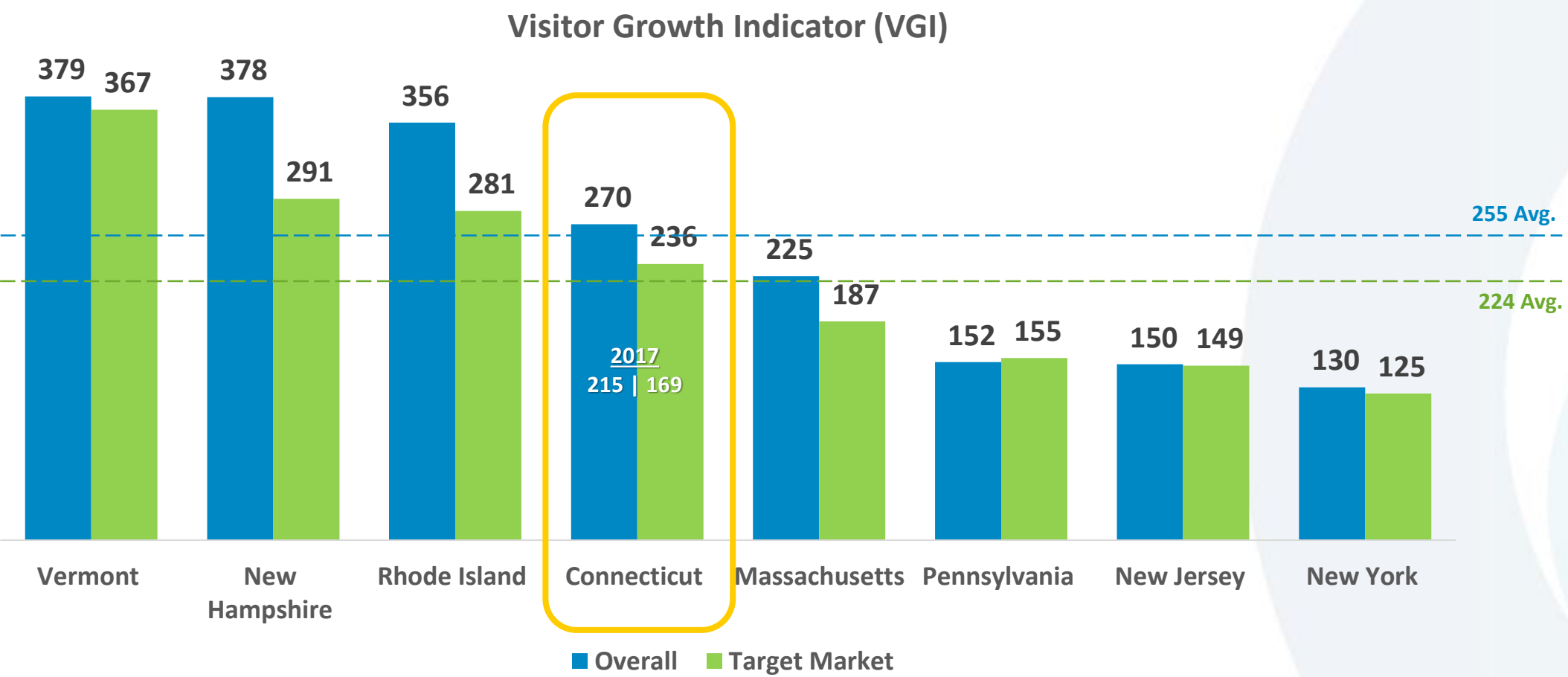
Q11: Using the scale provided, please indicate which of the following destinations have you visited for a getaway in the last five years? (5-pt. scale)

Connecticut has retained more than half of its overall visitors in the past five years, while more than six in ten target market visitors have been retained.



Q11: 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)

Connecticut's potential for future growth remains very strong with its market potential more than twice the level of recent visitation.



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

Marketing Communication Impact

MARKETING IMPACT KPIS



The 2018 Marketing Communications Campaign reached **2.83M** households.



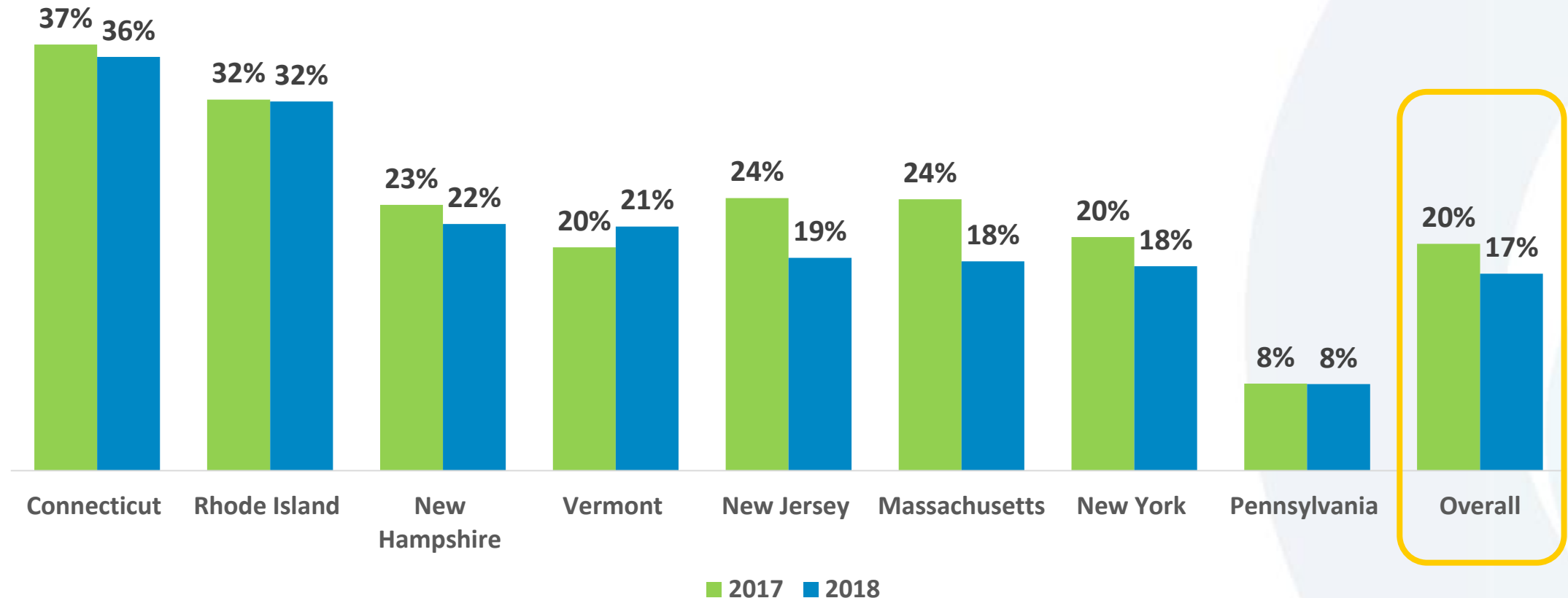
Marketing efficiency, or the gross cost per aware household, averaged **\$0.71**. Anything below \$1.00 is considered good.



Connecticut's 2018 Marketing Communications Campaign generated **168k** incremental trips.

Connecticut's overall ad awareness slipped by nearly three points compared to last year, but enjoyed increases among Vermont residents.

Connecticut Advertising Awareness by Market



Q14: 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 2018.

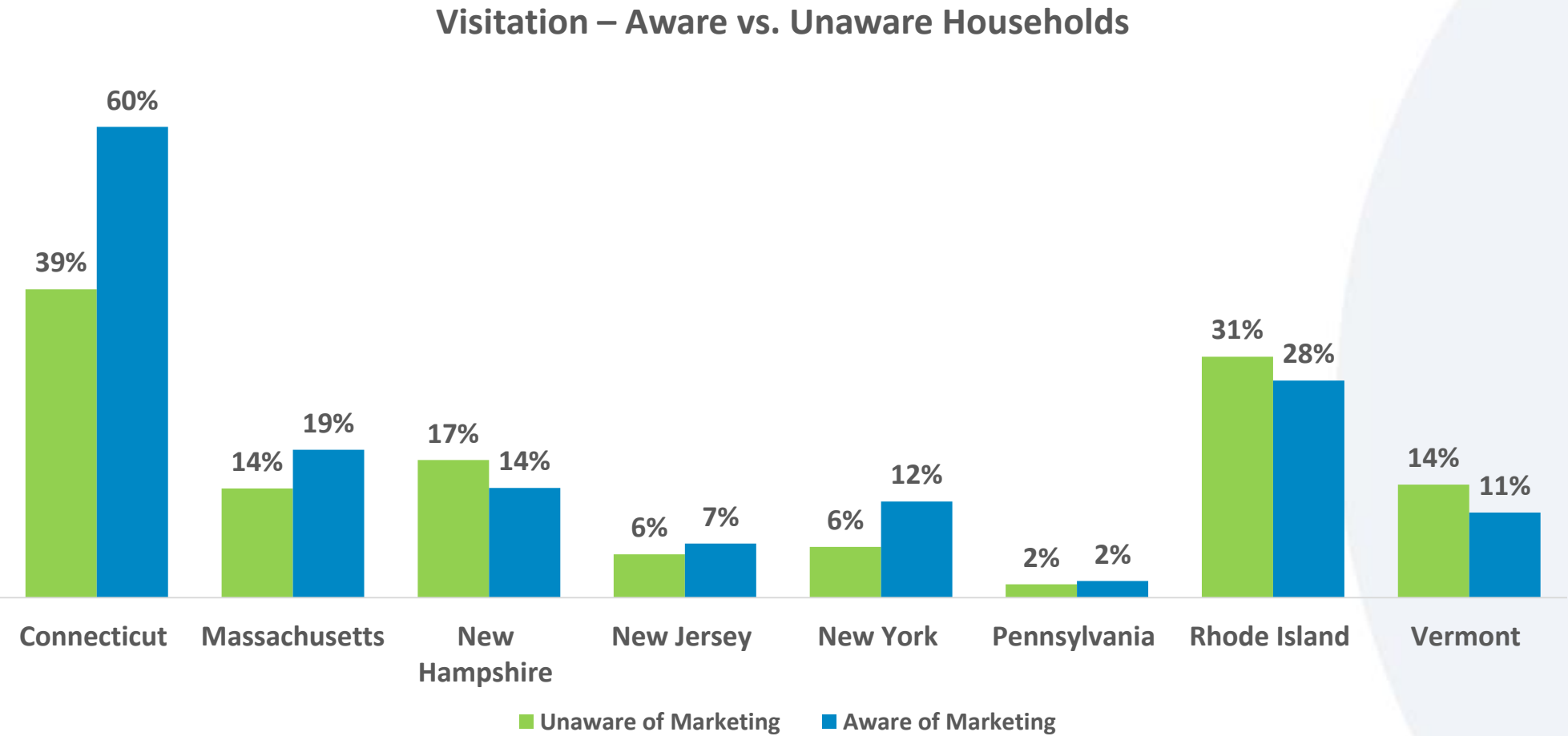
Market Reach (Aware Traveler Households)

Connecticut's marketing messages reached more than 2.8 million traveler households in the Northeast.

Unique market reach (recalled) declined among travelers from each state. But, of course, the marketing investment was also lower again this year (-8%). The next impact was an increase in the cost per aware travel household.

| Market | 2017 Market Reach | 2018 Market Reach | % +/- |
|-------------------------------|----------------------|----------------------|-------------|
| New York | 1,214k | 1,045k | -14% |
| New Jersey | 701k | 478k | -32% |
| Connecticut | 478k | 396k | -17% |
| Massachusetts | 565k | 372k | -34% |
| Pennsylvania | 334k | 304k | -9% |
| Rhode Island | 128k | 107k | -17% |
| New Hampshire | 114k | 89k | -21% |
| Vermont | 47k | 44k | -6% |
| Total Market | 3.58M | 2.83M | -21% |
| Advertising Investment | \$2.20M | \$2.02M | -8% |
| Cost/Aware HH | \$0.61 | \$0.71 | +16% |

Five of the eight of the states in Connecticut’s target market delivered incremental visitation this year. However, New Hampshire, Rhode Island and Vermont did not.



Q18: How long has it been since you last visited Connecticut for a getaway?

Incremental Conversion

The 2018 marketing communications campaign generated incremental travel of nearly six percentage points.

This indicates that those reached by the COT marketing communications efforts converted into visitors at a higher level than those who were not impacted by the state's marketing efforts. However, those unaware of COT's marketing messages in Rhode Island, Vermont and New Hampshire were just as likely to visit as those who hadn't seen a Connecticut ad.

| Market | 2017 Incremental Travel | 2018 Incremental Travel |
|---------------------|----------------------------|----------------------------|
| Connecticut | +8.5% | +20.6% |
| New York | +10.1% | +5.7% |
| Massachusetts | +10.8% | +4.9% |
| New Jersey | +6.6% | +1.4% |
| Pennsylvania | +0.7% | +0.4% |
| Rhode Island | +7.6% | -- |
| Vermont | +7.1% | -- |
| New Hampshire | +5.5% | -- |
| Total Market | +8.2% | +5.9% |

Incremental Trips

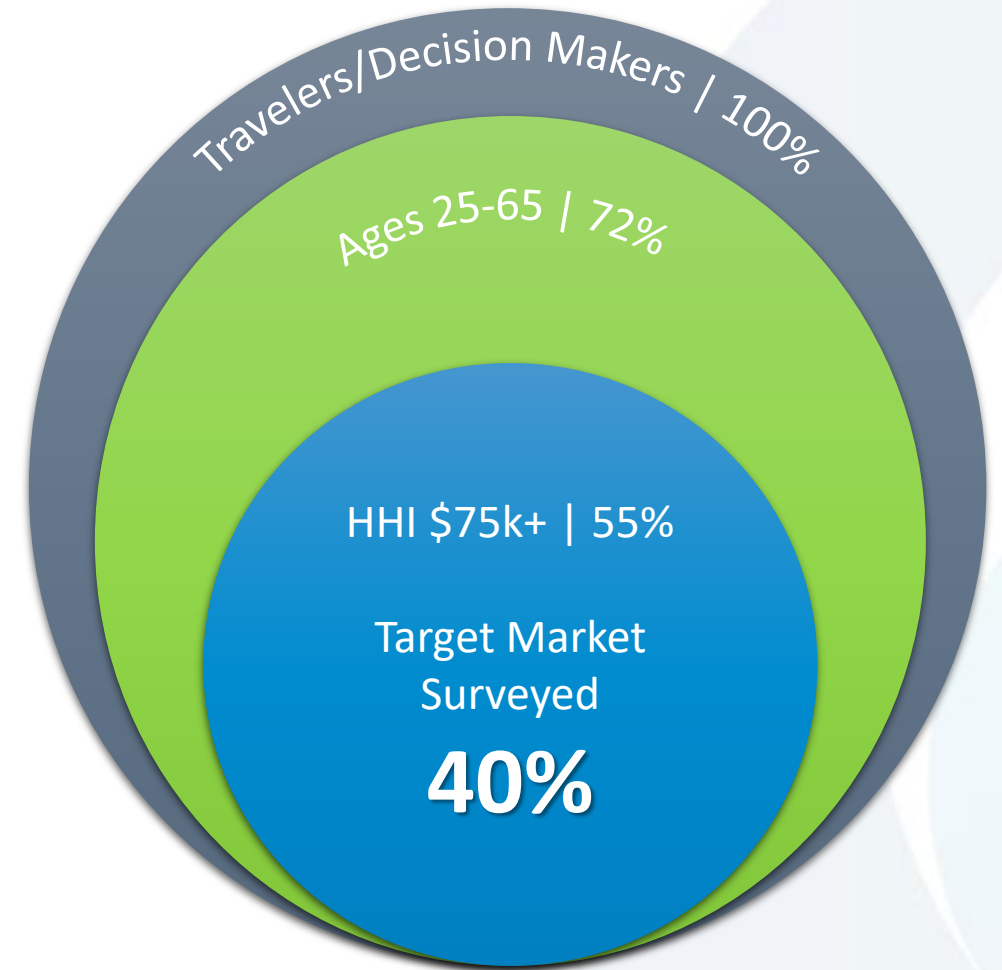
Extrapolated across the number of aware traveler households in the New England, incremental travel is projected at more than 168k incremental trips.

These are incremental trips that were a direct result of the COT's marketing communications campaign that would not have occurred otherwise. The largest number of incremental trips came from Connecticut and New York travelers.

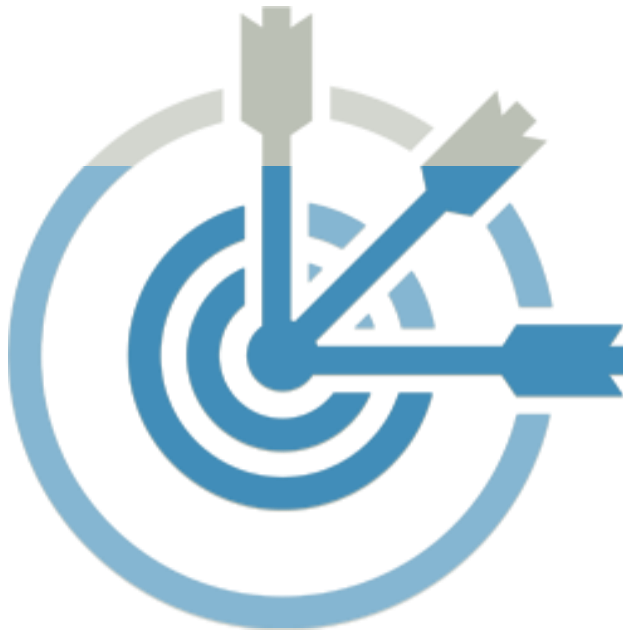
| Market | 2017 Incremental Trips | 2018 Incremental Trips |
|---------------------|---------------------------|---------------------------|
| Connecticut | +40.6k | +81.6k |
| New York | +122.7k | +60.1k |
| Massachusetts | +61.0k | +18.3k |
| New Jersey | +46.3k | +6.5k |
| Pennsylvania | +2.5k | +1.3k |
| Rhode Island | +9.8k | -- |
| New Hampshire | +6.2k | -- |
| Vermont | +3.3k | -- |
| Total Market | +292k | +168k |



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, September 2016 and December 2017 among the same target market.

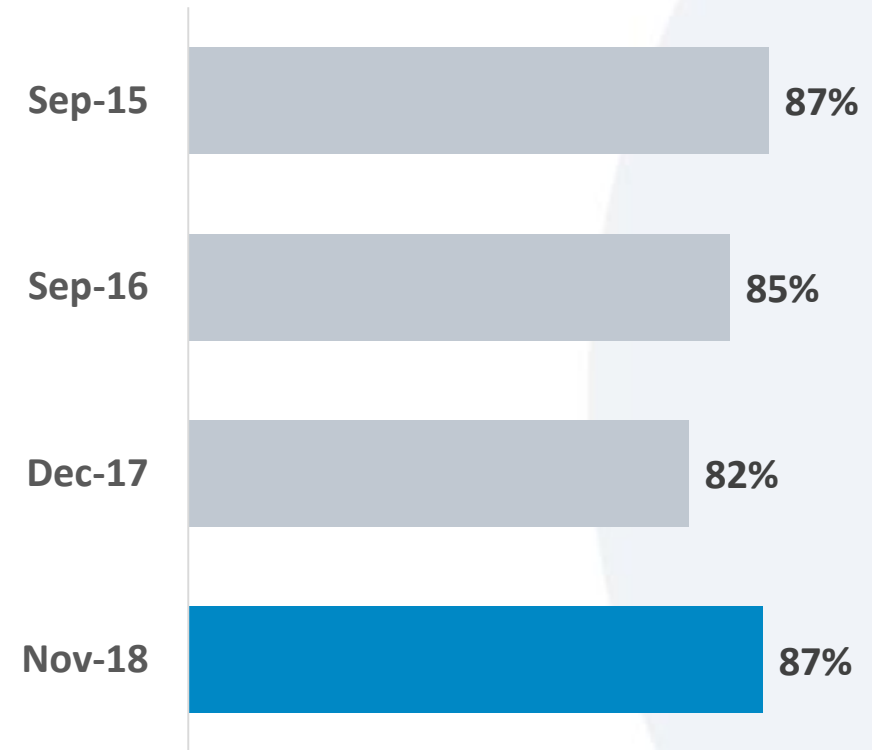


Brand fit for Connecticut advertising improved by a significant five points this year among aware target market travelers.



Brand Fit
87%

Advertising Was Consistent with the Perception of Connecticut

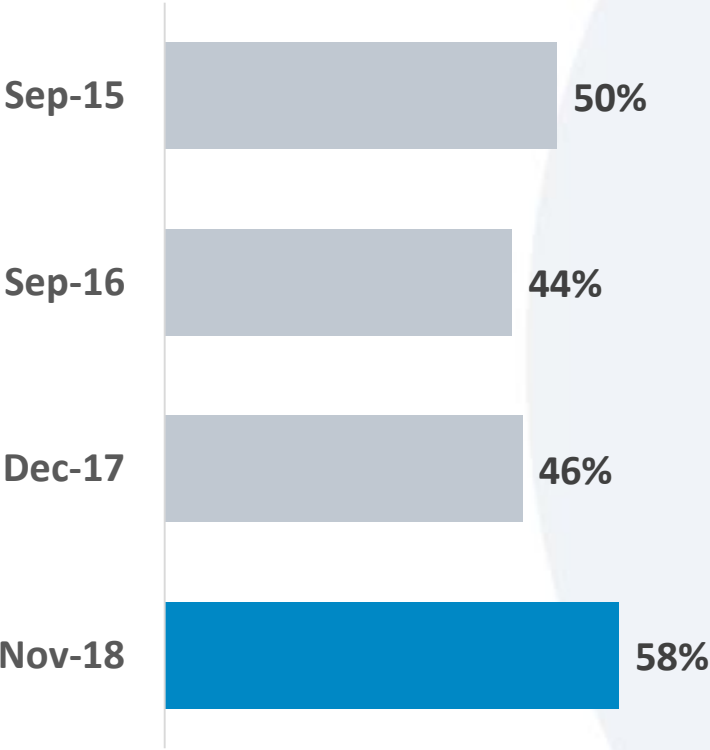


Target market travelers indicated they felt this past year’s marketing communications delivered even more new information than in 2017.



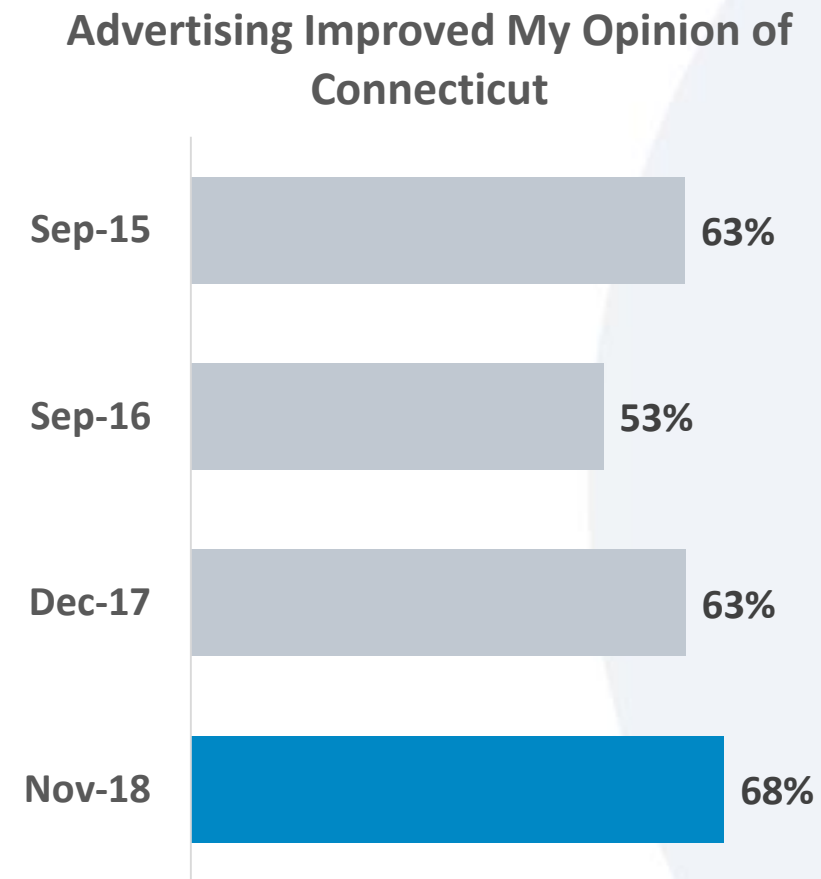
New Information
58%

Advertising Provided Me with New Information about Connecticut



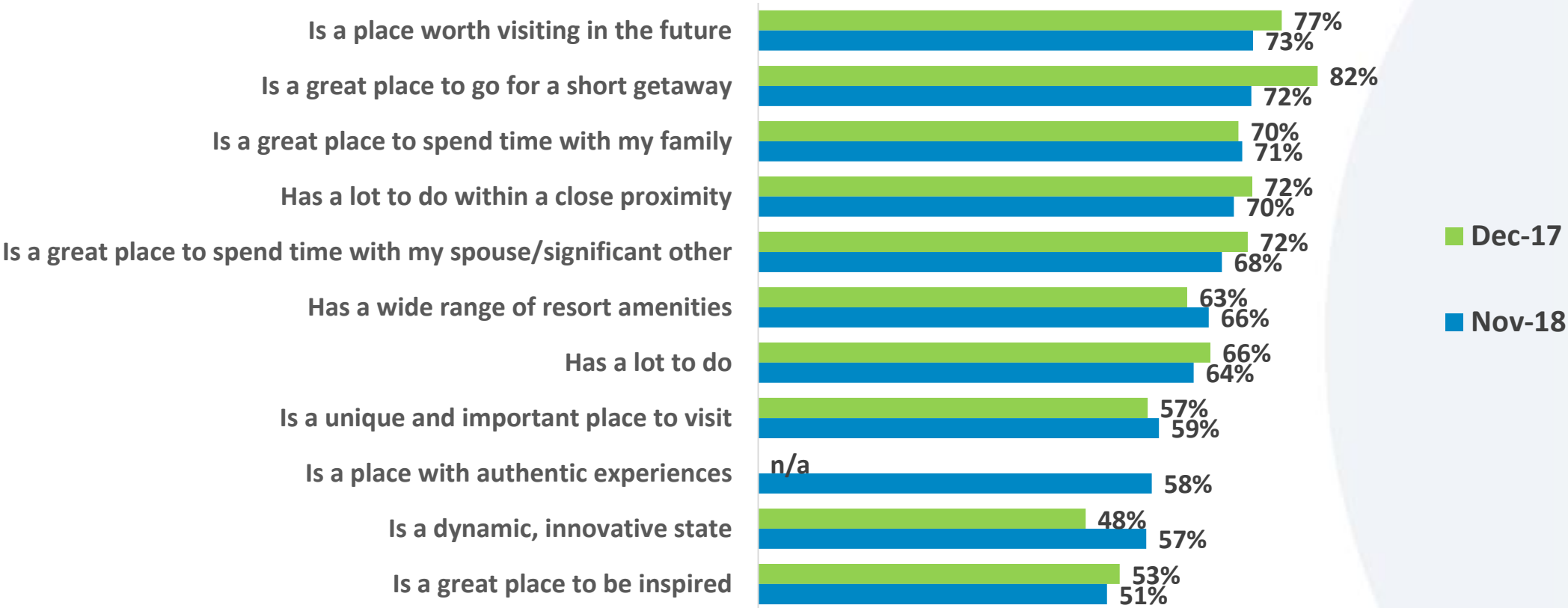
Q34: Did the online news stories, social media posts or advertisements tell you something new about Connecticut?

The marketing improved more than six in ten travelers' opinions of Connecticut in 2018, five points higher than improved opinions from last year.



Marketing continues to persuade travelers that Connecticut is a place worth visiting in the future. Furthermore, there was an increase in those who believe Connecticut is dynamic and innovative.

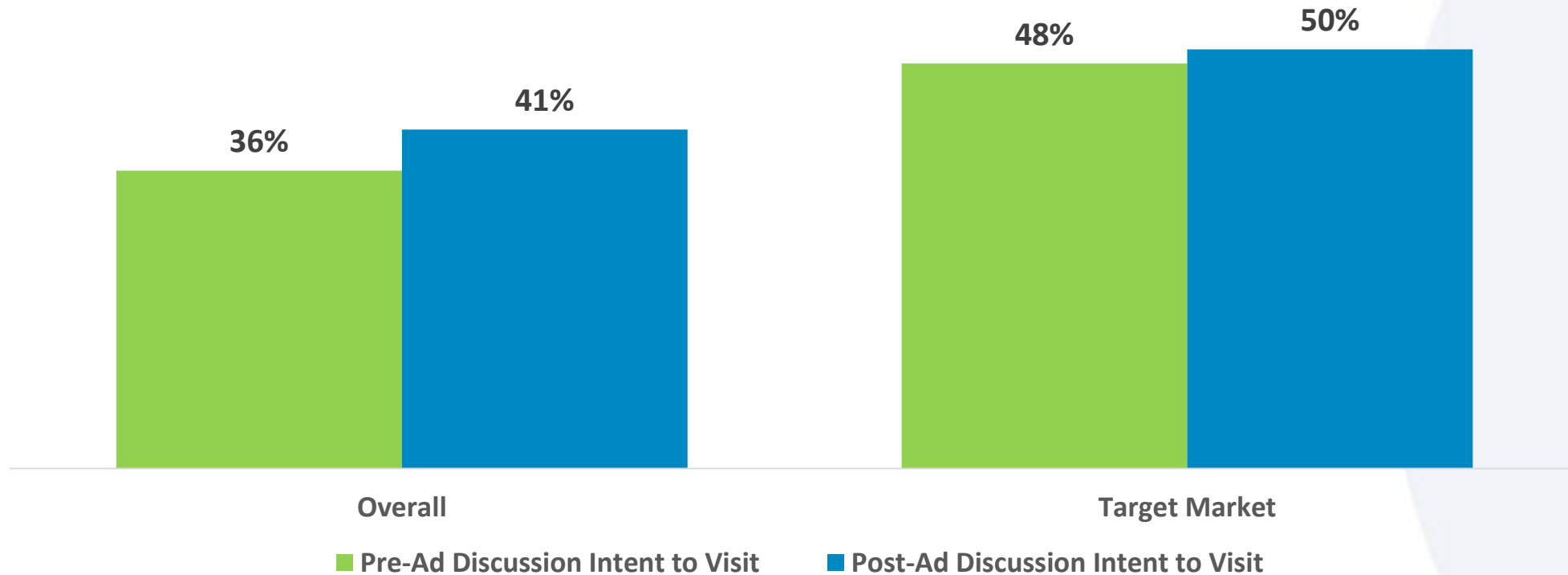
The Advertisements Made Me Think Connecticut...



Q36a: 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 five points overall (and by two points among the target market) after introducing the marketing communications campaign.

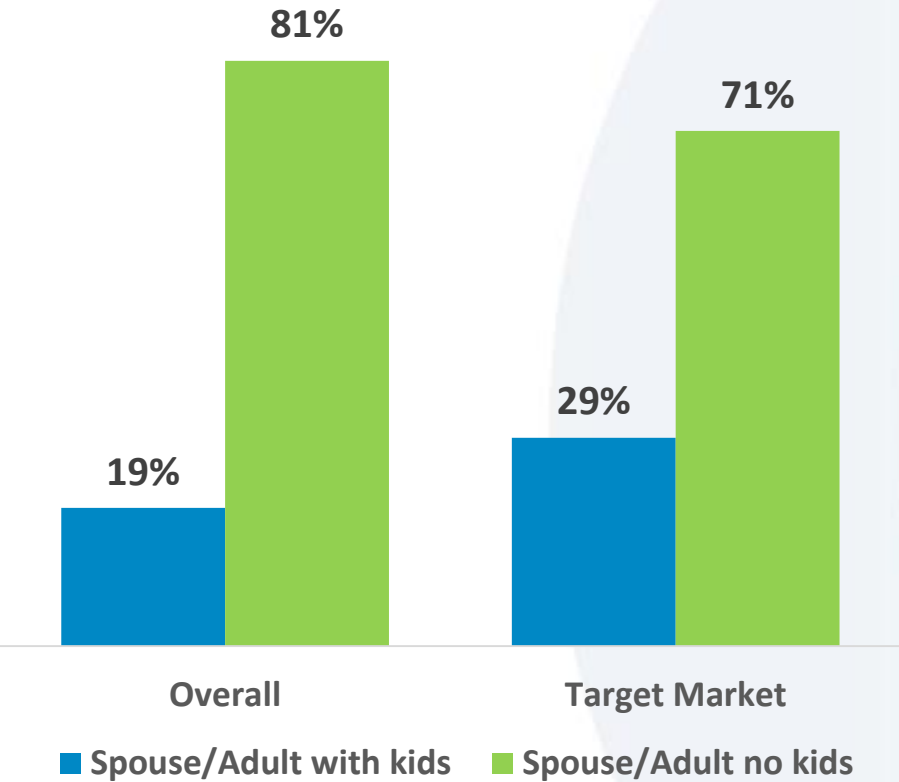
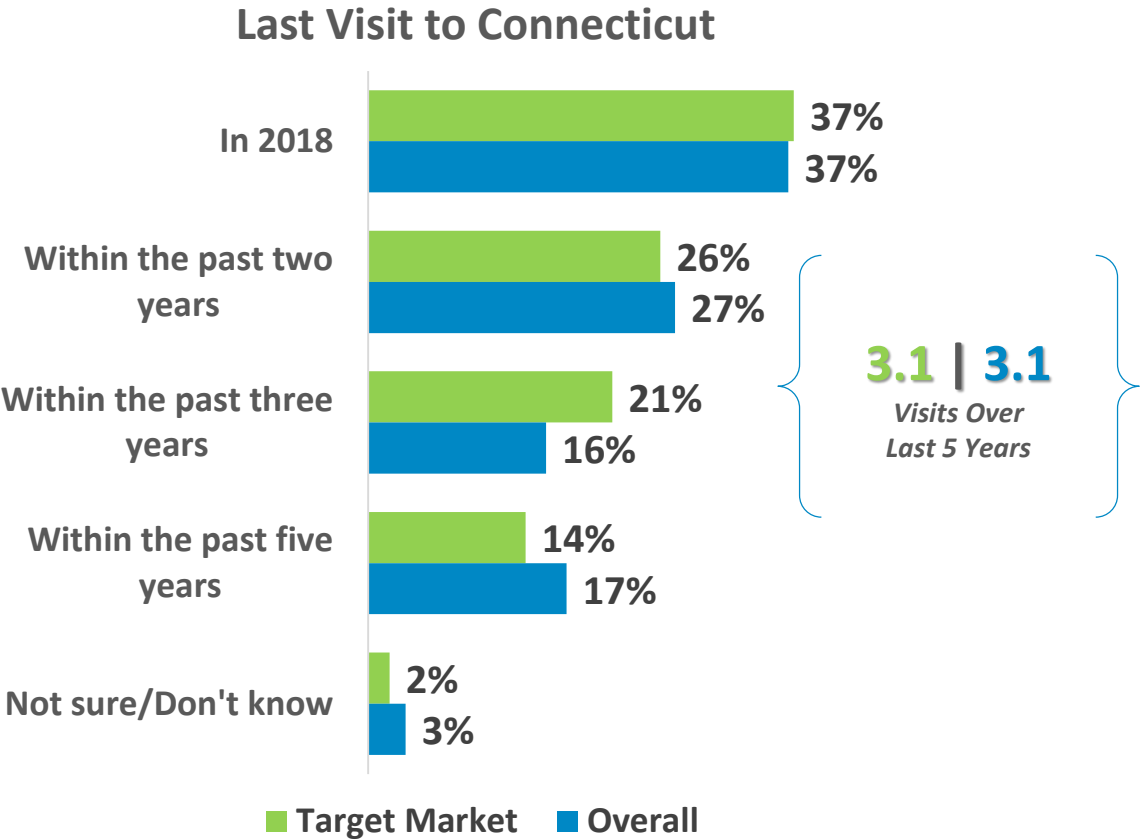
% Probably/Definitely Will Visit Connecticut in the Next 12 Months



Connecticut Visitor Behavior

05

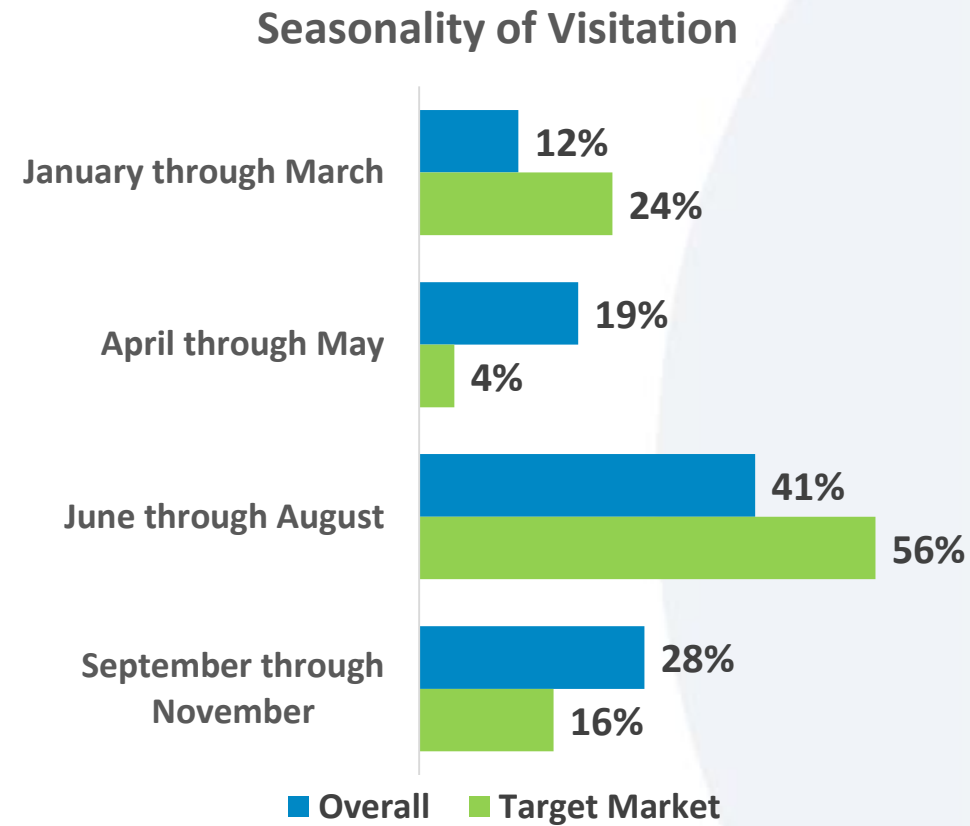
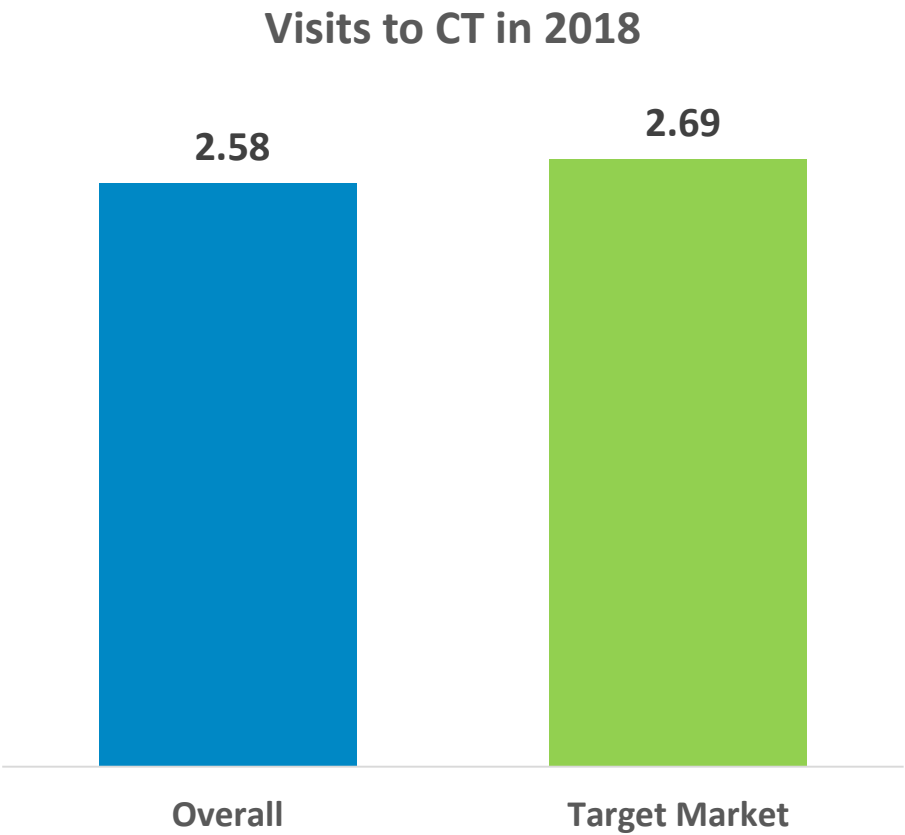
Overall travelers and those among the target audience exhibit similar visitation patterns.



Q17: How many times have you visited Connecticut for a getaway in the last five years?
Q18: How long has it been since you last visited Connecticut for a getaway?
Q22: With whom did you travel when visiting Connecticut for your most recent getaway?

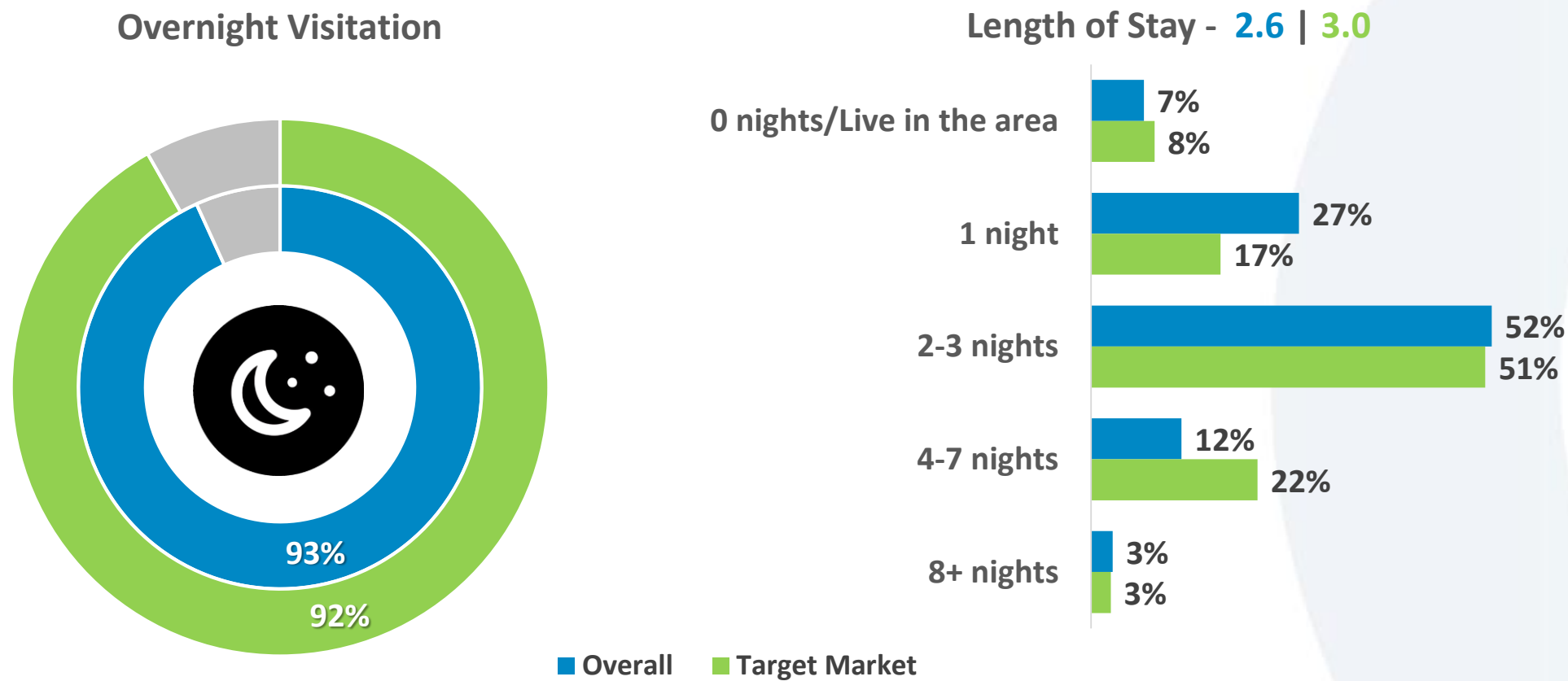
RESPONDENT BASE: OVERALL VISITED IN THE PAST 5 YEARS | N=795 59
TARGET MARKET VISITED IN THE PAST 5 YEARS | N=333

New England travelers visited Connecticut an average of 2.6 times with the June through August timeframe being the most popular.



Q18: How many times have you visited Connecticut for a getaway in 2018?
Q19: In which of the following months have you visited Connecticut in 2018?

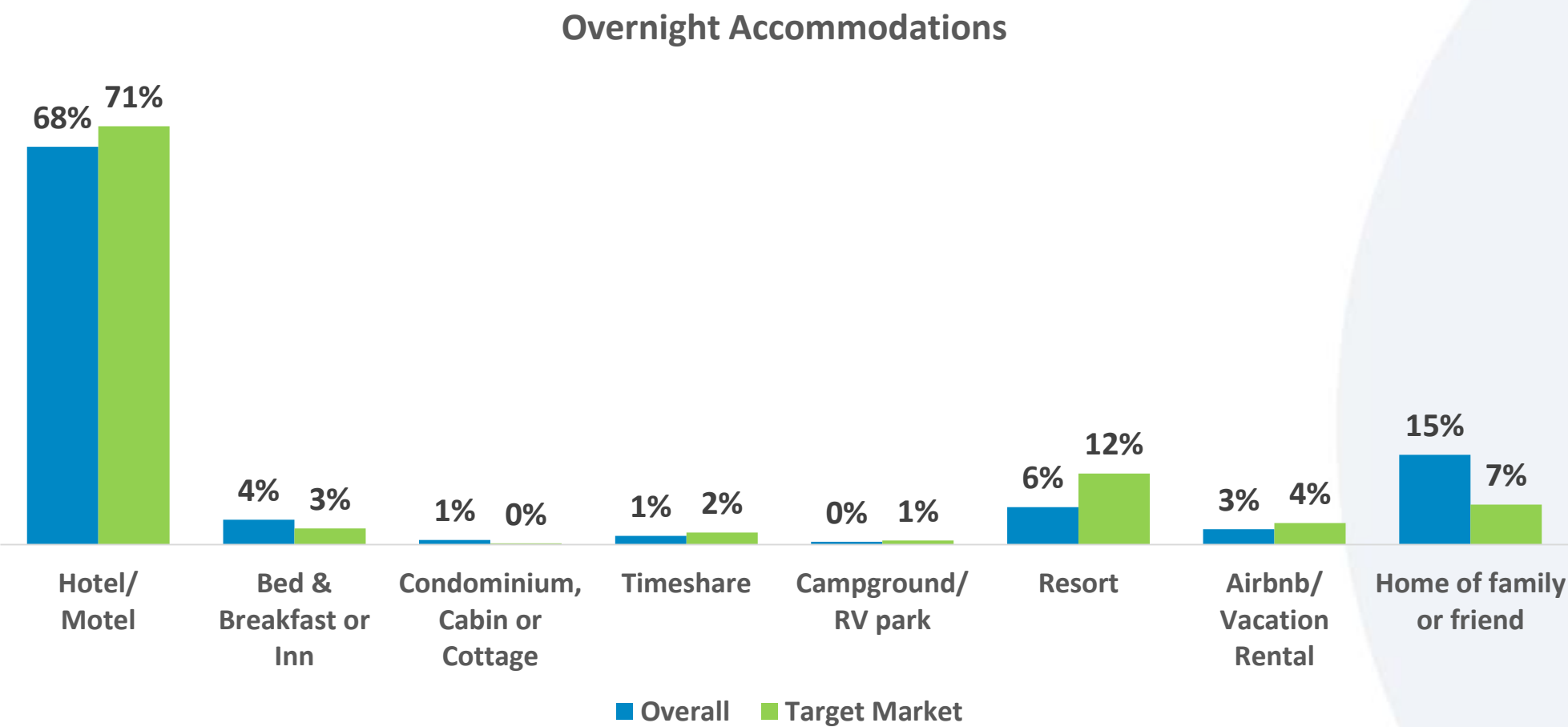
Similar to last year, the vast majority of Connecticut travelers stayed overnight in the state on their last visit, with most staying nearly three nights.



Q24: 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=609 61
TARGET MARKET VISITED CONNECTICUT IN THE PAST 2 YEARS | N=257

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



Q25: Which of the following best describes the type of accommodations you used on your most recent trip?

RESPONDENT BASE: OVERALL OVERNIGHT VISITORS | N=523 62
TARGET MARKET OVERNIGHT VISITORS | N=224

Recent visitors to Connecticut were slightly younger, had higher incomes and were more likely to be employed full time.

| Category | Overall Respondents | 2018 Visitors | Non-Visitors |
|--------------------------------------|---------------------|---------------|--------------|
| Household Income | \$88.6K | \$90.9k | \$81.5K |
| Age of Respondent | 53 | 46 | 48 |
| 25-34 | 15% | 22% | 23% |
| 35-54 | 32% | 46% | 30% |
| 55+ years | 50% | 27% | 40% |
| Aided Brand Awareness | 59% | 100% | 99% |
| Assisted Ad Awareness | 16% | 42% | 17% |
| Interest in Visiting Next 2 Years | 40% | 86% | 26% |
| Incidence of Visitation Last 5 Years | 26% | 100% | 0% |
| White, Non-Hispanic | 89% | 88% | 90% |
| Black, Non-Hispanic | 3% | 3% | 3% |
| Hispanic | 4% | 5% | 4% |
| Asian | 4% | 5% | 4% |
| Other | 1% | 1% | 1% |
| Employed Full-Time | 45% | 56% | 41% |



Thank You!



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