

# H2R Market Research

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*Reveal Your Customer's Full Experience*

## **Connecticut Office of Tourism 2019 Brand Awareness Research**

*Delivered December 2019*

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## Overview

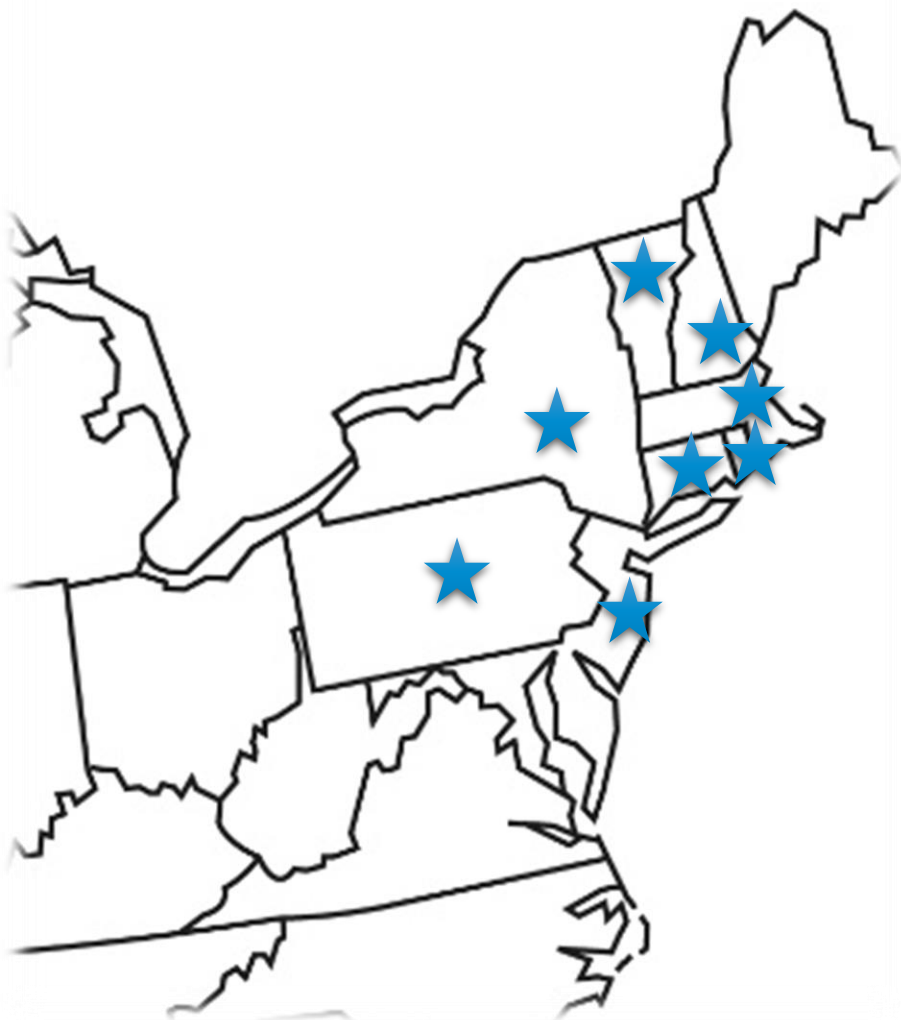
### Executive Summary & Considerations

*Pages 3-7*


**Purpose.** The purpose of conducting the Connecticut Brand Awareness Research is to gain a deeper understanding of how the Connecticut travel brand is perceived in the marketplace relative to Connecticut's direct competitors and previous years.

**Research Audience.** This research was conducted among a general population cell of travelers living in advertised markets (the states of Connecticut, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island and Vermont).

**Sample.** A total of 2,200 responses were collected for this research, providing for a maximum margin of error of +/- 2.1% at a 95% confidence Interval. This includes panel responses from Connecticut (334n), Massachusetts (340n), New Hampshire (268n), New Jersey (282n), New York (288n), Pennsylvania (304n), Rhode Island (251n) and Vermont (61n).



- The Connecticut Brand Awareness Study was conducted among travelers living in the Connecticut, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island and Vermont markets as shown on the map to the left. Results from each market were weighted commensurate with household population to provide an overall weighted average reflective of the aggregate travel population across the advertised markets. This means that those destinations with larger populations receive a heavier weight than markets with smaller populations.
- **Overall Audience:** Throughout the presentation, data will be referred to as “Overall” and this includes all responses to the survey from the travelers outlined above. We may also refer to this audience as simply “Travelers”.
- **Target Audience:** Throughout the presentation, there will also be references to a “Target Market” audience, which is a reference to respondent demographics. The Target Market travelers are aged 25-64 with a household income of \$75,000+.
- **Ad/Marketing-Aware Audience:** Finally, there will also be references to the Ad/Marketing-Aware Audience. Whether referring to Overall or Target Audience, these respondents indicated they are aware of COT advertising and/or marketing efforts.



Connecticut 2019 Brand Awareness

# Executive Summary



# Connecticut's Brand Perception Improves

- Connecticut continues to be known as a state destination that offers a quick getaway with lots to see and do. More than two-thirds of all New England travelers and Target Market\* travelers agreed with this statement. Travelers most associate Connecticut with images of small towns, beautiful scenery, historical sites and fall foliage—similar to years past.
- Connecticut was evaluated across more than 80 Brand Attributes, Descriptors and Business Development characteristics by New England travelers. Overall, these ratings experienced an upward trend compared to last year. The average scores for Brand Attributes (+2pts), Brand Descriptors (+4pts) and Business Development Ratings (+3pts) all increased this year.
- While these positive brand perceptions are important, it is perhaps even more important to capitalize on those characteristics that drive visitation. In Connecticut's case, the attributes that correlate most closely with interest in visiting the State include *It is a fun destination*, *Great place to spend time with my friends*, *Offers good value for the money* and *Has lots of things to see and do*.

\*Target Market travelers are aged 25-64 with a household income of \$75,000+





## Brand Health Improves

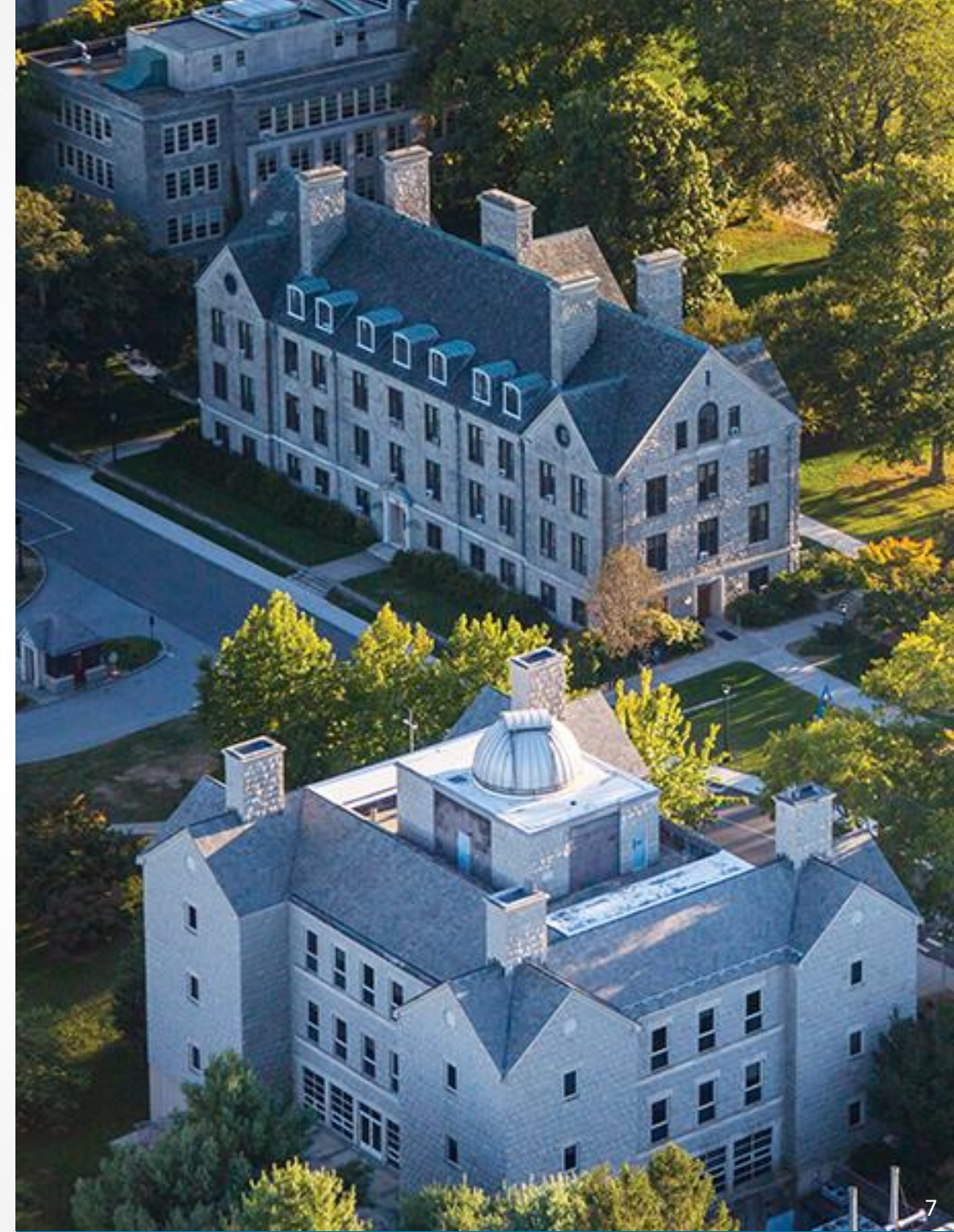
- Aided Brand Awareness also saw an up-tick among the Target Market from 57% to 61% this year. And, intent to visit Connecticut in the next 12 months reached 42%—representing a significant six point increase. Those most likely to visit Connecticut include residents (87%), and travelers from Rhode Island (67%) and Massachusetts (51%).
- After slipping last year, reported visitation to Connecticut rebounded nicely in 2019. Overall 13% of New England Travelers reported visiting the state in the past 12 months (+3pts). The increase is even more pronounced among Target Market travelers whose visitation increased by four points this past year.
- Additionally, Connecticut had a conversion rate of 54% overall (+8pts) and 59% of Target Market travelers (+6pts). Retention among past visitors also increased to 65% among all New England travelers (+11pts) and 68% among Target Market travelers (+7pts).





# Marketing Positively Impacts Visitation

- The Connecticut Office of Tourism (COT) also continues to deliver an efficient and effective tourism marketing campaign. Marketing awareness increased by two points this year and helped fueled an increase in the number of households who saw/heard/viewed a COT ad to more than three million this year (+190k over last year).
- This increase in marketing awareness was generated despite a slightly smaller marketing budget which delivered a campaign that was 7% more efficient than last year. Overall, the 2019 marketing campaign generated Incremental Travel of 4.4%, or 134,000 household trips that would not have occurred without COT's marketing efforts.
- The marketing increased travelers' perceptions of Connecticut as *a place to visit for a short getaway* (+12pts), *as a place worth visiting in the future* (+6pts) and *as a great place to spend time with a spouse/significant other* (+6pts). Perhaps most importantly, intent to visit after discussing the ads increased by five points compared to intent to visit before any mention of the marketing.




# Key Performance Indicators

	2019 Overall Travelers	Var. to 2018 Overall Travelers	2019 Target Market	Var. to 2018 Target Market
Aided Brand Awareness	55.3%	-4pts	61.2%	+4pts
Interest in Visiting Connecticut	38.3%	-2pts	37.0%	-6pts
Intent to Visit Connecticut	42.4%	+7pts	45.4%	-3pts
Average %T2B* – Connecticut Brand Attributes	47.9%	+2pts	45.8%	-4pts
Average %T2B – Connecticut Brand Descriptors	46.8%	+4pts	43.9%	-3pts
Average %T2B – Connecticut Business Development Ratings	43.3%	+3pts	40.2%	-4pts
Marketing Message Awareness	19.3%	+2pts	17.3%	+5pts
Unique Market Reach	3.0M	+190k	n/a	n/a
Cost per Aware Travel Household	\$0.66	-\$0.05	n/a	n/a
Incremental Conversion	4.4%	-2pts	n/a	n/a
Incremental Visits	134k	-34k	n/a	n/a
% Planning to Visit Connecticut as Result of Seeing Ads (Aware Travelers)	16.5%	-6pts	13.2%	-3pts

\*%T2B: Percent top 2 box scores, or the sum of 4s and 5s on a 5-point scale

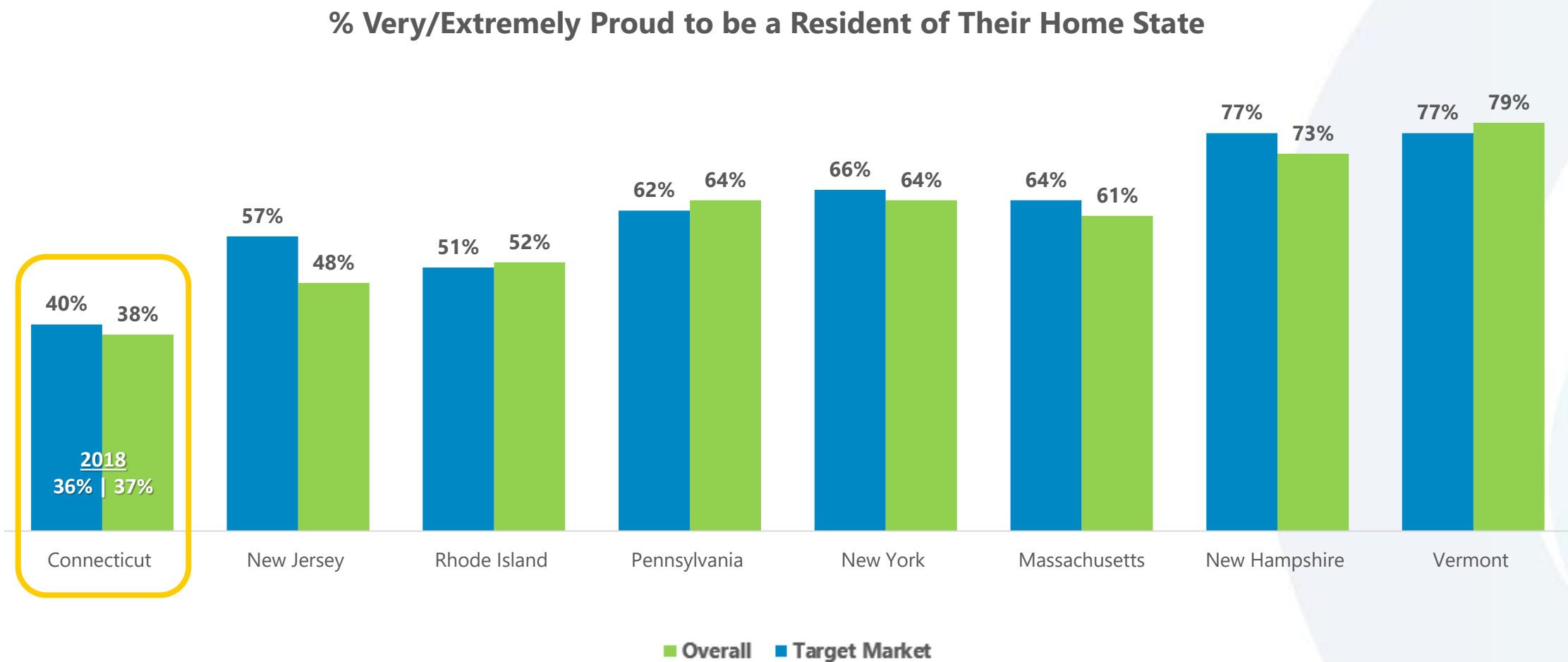


A scenic coastal sunset with houses and a sailboat. The image is split diagonally. The left side is a solid blue gradient. The right side shows a sunset over a body of water with houses and a sailboat. The sky is filled with colorful clouds in shades of orange, red, and purple. The water is calm, reflecting the sky. In the foreground, there are large, dark rocks. On the right, there are several houses with lit-up windows and balconies. A sailboat is visible in the distance on the left.

Connecticut 2019 Brand Awareness

# Brand | Perception

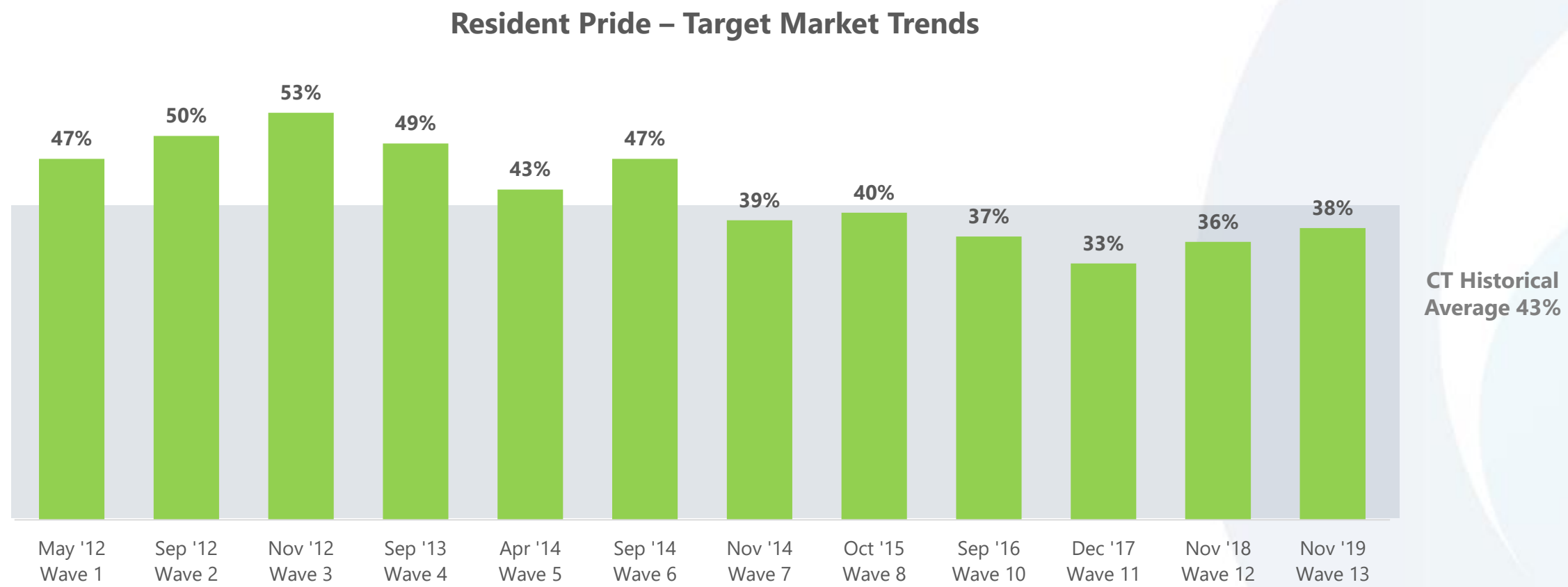
# Resident pride increased overall and among Target Market travelers in 2019, but continues to trail other state residents in the Northeast.



Q17: How proud do you feel about being a resident of your state? (5-pt. scale)

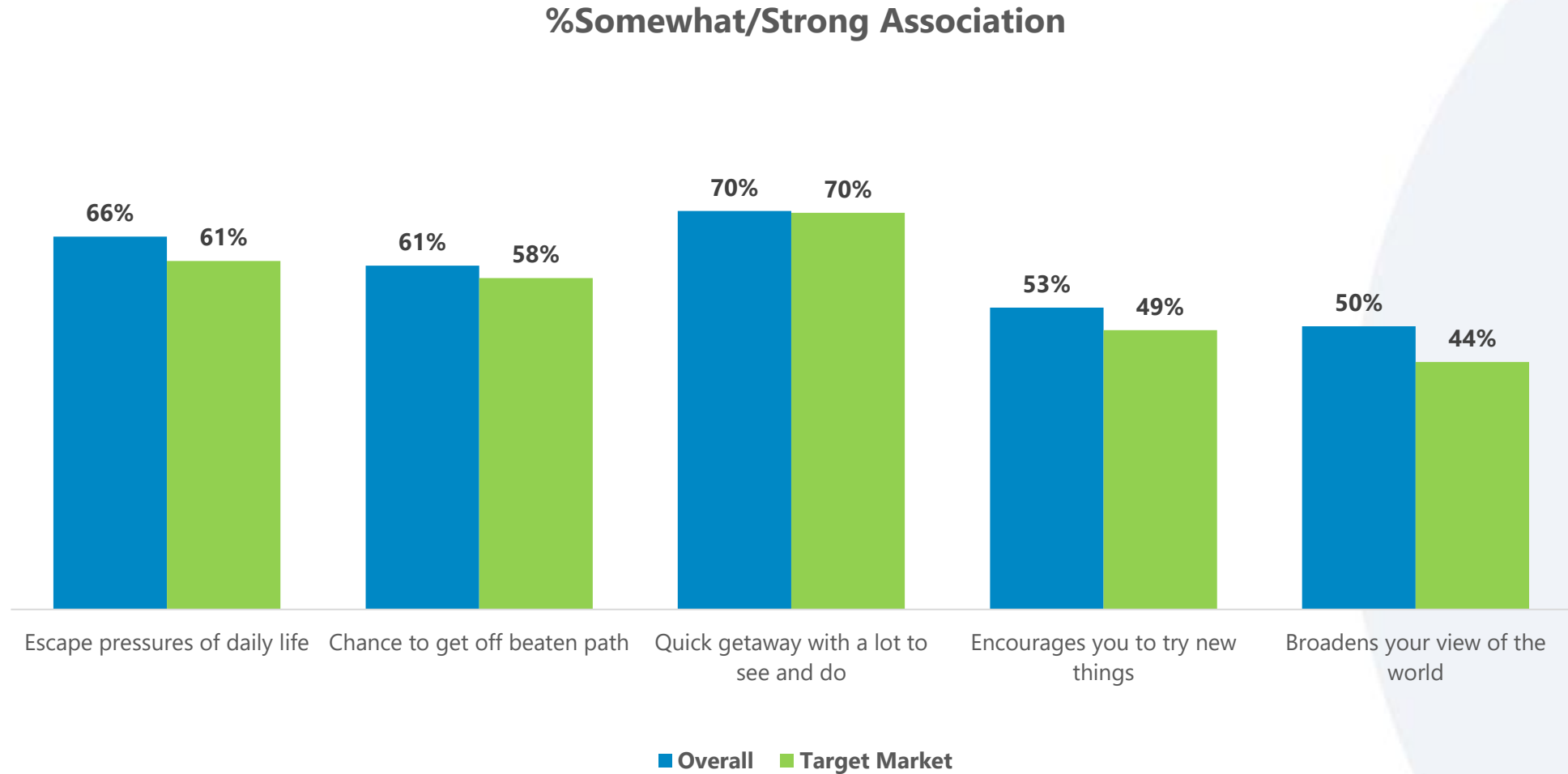


# Resident pride increased for a third consecutive year and is beginning to approach the Historic Average of 43%.



Q17: How proud do you feel about being a resident of your state? (5-pt. scale)

## *A quick getaway with a lot to see and do* continues to be the attribute most associated with travel to Connecticut.



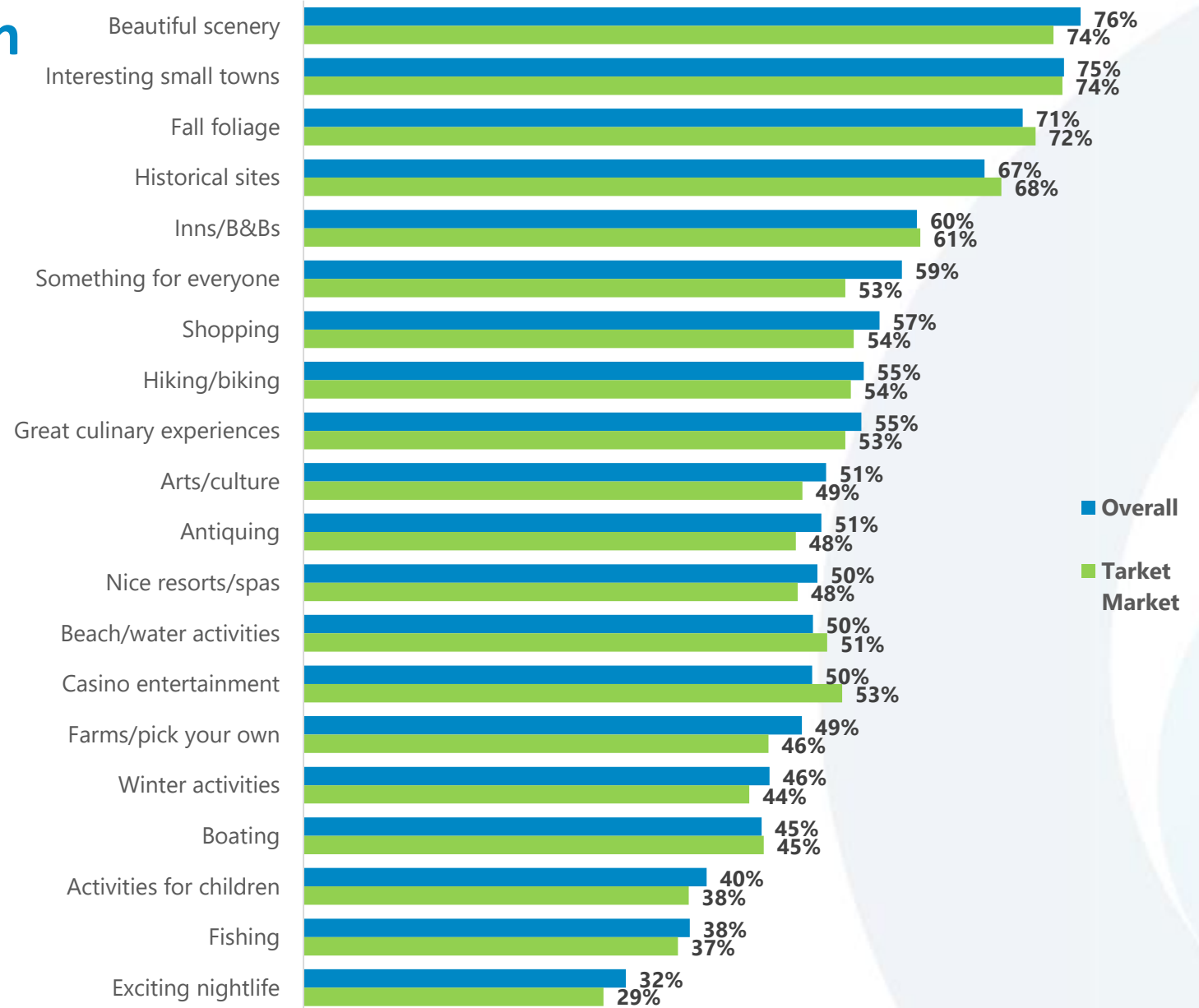
Q19: Please indicate to what degree you associate the following attributes or characteristics with getaway trips to Connecticut. (5-pt scale)



# Getaway Activity Association

Both overall travelers and those in the Target Market associate *small towns*, *beautiful scenery*, *historical sites* and *fall foliage* with Connecticut above all else.

Conversely, both targets are less likely to associate Connecticut with things like exciting nightlife, fishing and activities for children.

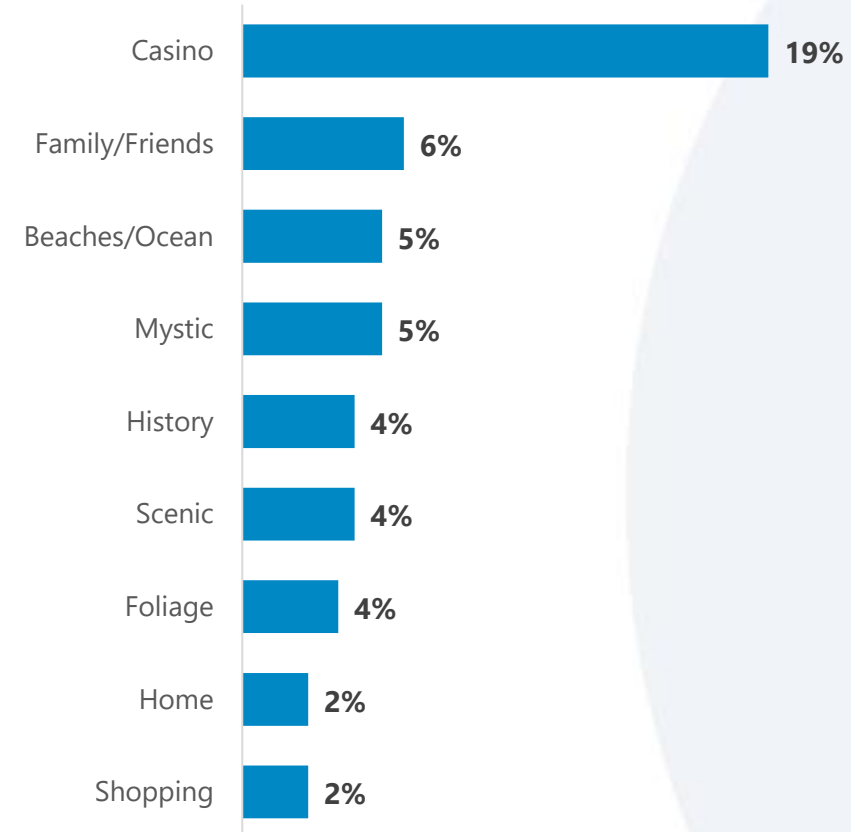


Q20: Please indicate to what degree you associate the following activities with getaway trips to Connecticut. (5-pt scale)

**New England travelers are most likely to associate casinos, family, friends, beaches and the ocean with the State of Connecticut as a place to visit.**



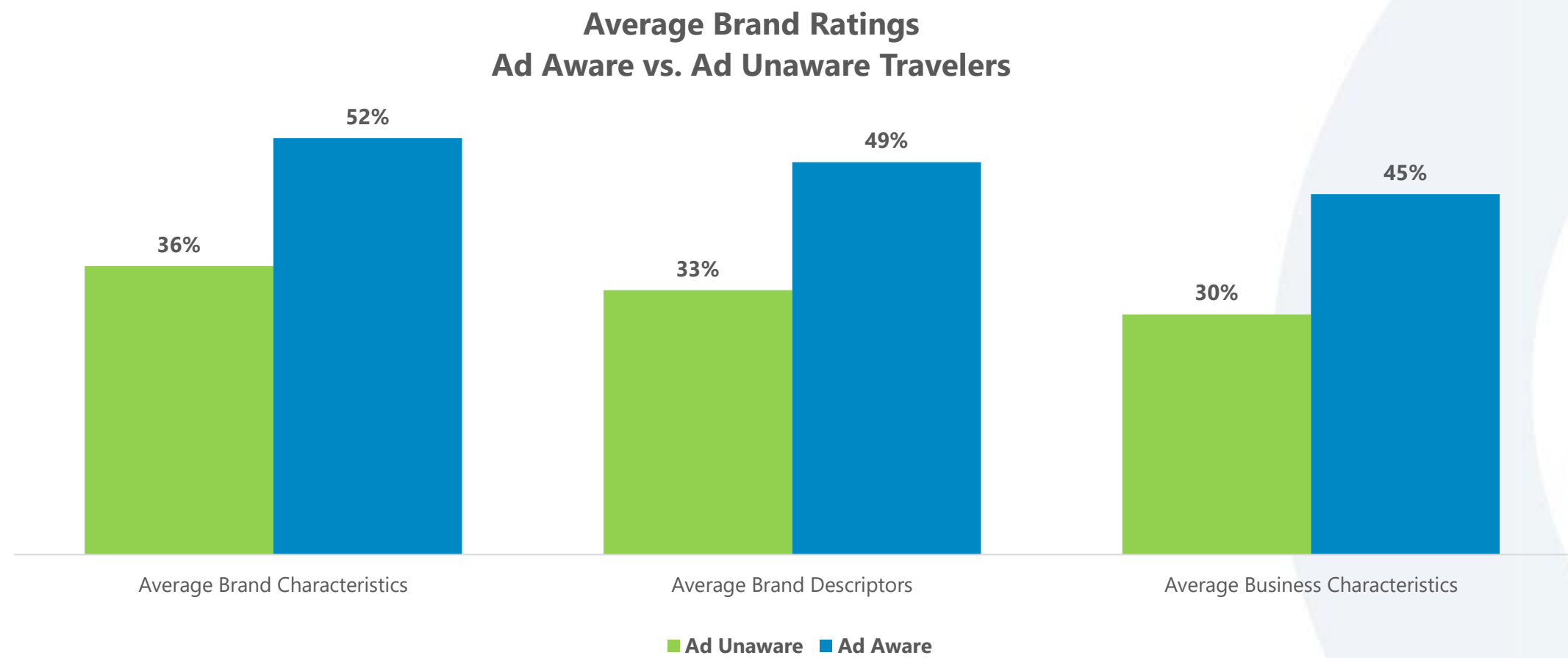
## Unaided Connecticut Descriptors



Q25: What first comes to mind when you think of Connecticut as a place to visit?



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



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



64% | 67%  
*Beautiful Scenery*



66% | 64%  
*Beautiful Fall Foliage*



60% | 64%  
*Interesting Small Towns to Explore*

■ 2018 ■ 2019

Q31: 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	2018	2019		2018	2019
Offers beautiful scenery	61%	67% ▲	Offers great culinary experiences	43%	47% ▲
Has beautiful fall foliage	66%	64%	Offers a good value for the money	39%	47% ▲
Has interesting small towns to explore	60%	64% ▲	Offers arts and culture	46%	47%
Offers a sense of history as part of the landscape	55%	57%	Has great shopping	43%	46% ▲
Great place to rest and relax	53%	56% ▲	Has nice resorts/spas	45%	45%
Has lots of historic sites to visit	53%	56% ▲	Has vineyards/wineries	38%	45% ▲
Great place to spend time with my spouse/significant other	48%	54% ▲	Offers "pick your own" farms	38%	44% ▲
Has lots of things to see and do	50%	53% ▲	Has great antiquing	45%	43% ▼
Great place to spend time with my friends	46%	52% ▲	Great place to spend time with children	41%	43%
Offers great inns/B&Bs	51%	51% ▲	Is a good place for boating	46%	41% ▼
Has friendly, welcoming people	47%	51% ▲	Is a good place for fishing	41%	40%
Is a good place for hiking/biking	45%	49% ▲	Has great beaches	38%	38%
Is a fun destination	46%	49% ▲	Offers action/adventure sports (e.g. zip lining, rock climbing)	35%	36%
Offers a romantic escape	43%	49% ▲	Offers exciting nightlife	33%	35%
Has winter activities	49%	49%	Good place for golfing	33%	35%
Offers casino entertainment	54%	48% ▼	Has great theatre	35%	32% ▼

Q31: 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 2018 scores.

Travelers are most likely to associate Connecticut with words/phrases such as historical, traditional and close by.



60% | 62%  
*Historical*



53% | 60%  
*Traditional*



56% | 59%  
*Close By*

■ 2018 ■ 2019

Q32: 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	2018	2019		2018	2019
Historical	60%	62%	Artsy	40%	44% ▲
Traditional	53%	60% ▲	Affordable	36%	43% ▲
Close by	56%	59% ▲	Fresh	40%	43% ▲
Clean	52%	58% ▲	Diverse	39%	43% ▲
Quaint	52%	56% ▲	Contemporary	41%	42%
Friendly	47%	55% ▲	Exciting	37%	41% ▲
Welcoming	48%	54% ▲	Vibrant	38%	41% ▲
Authentic	48%	54% ▲	Inspiring	37%	40% ▲
Upscale	50%	53% ▲	Revolutionary	38%	39%
Nature-oriented	48%	52% ▲	Trendy	36%	38%
Cultural	46%	50% ▲	Pretentious	34%	37% ▲
Down-to-earth	42%	49% ▲	Innovate	33%	37% ▲
Fun	46%	49% ▲	Bold	30%	34% ▲
Sophisticated	44%	46%	Unexpected	29%	32% ▲
Smart	42%	46% ▲			

Q32: 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 2018 scores.



New England travelers are still 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.



52% | 57%

*Good Quality of Life*



50% | 53%

*Lots of Educated People for Hiring*



47% | 52%

*Great Place to Raise a Family*

■ 2018 ■ 2019

Q33: 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

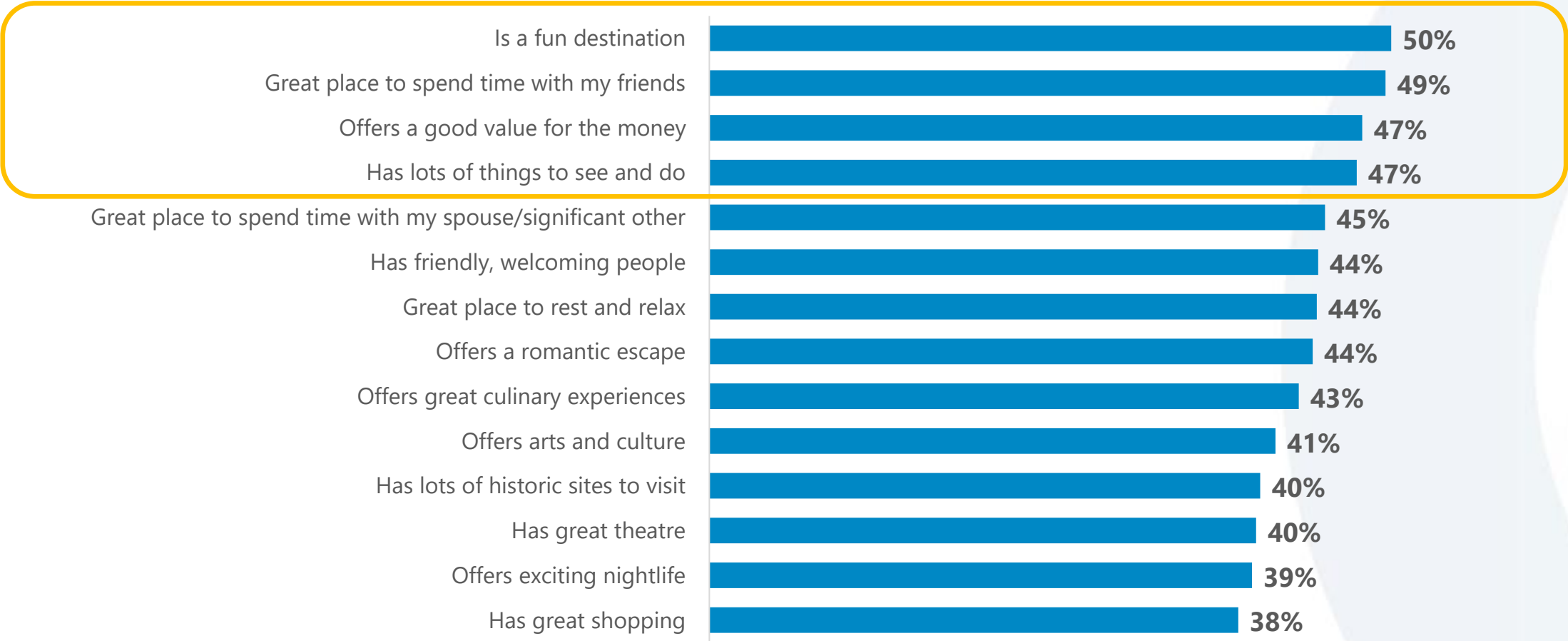
Describes CT well/extremely well	2018	2019
A place with a good quality of life	52%	57% ▲
Has lots of educated people if you are hiring	50%	52%
Great place to have kids and raise a family	47%	52% ▲
Great place to live	46%	49% ▲
A great place to meet interesting people	43%	48% ▲
A progressive state	46%	47%
Place with creative people	43%	45%
Place with innovative people	40%	42%
A state with a lot of growth	38%	42% ▲
State with lots of diversity	40%	42%
Great place to work	39%	42% ▲
Has lots of quality skilled labor if you are hiring	37%	41% ▲
Friendly to businesses	39%	41%
A great place for businesses to network	36%	40% ▲
A place of ingenuity	37%	39%
A dynamic, innovative state	36%	39% ▲
Great place for innovation	36%	39% ▲
Great place to relocate an existing business	33%	37% ▲
A place you can get things done quickly	33%	36% ▲
Great place to start up a business	33%	36% ▲

Q33: 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 2018 scores.

The top choice drivers (attributes aligned with interest in visiting) are fun and spending time with friends. But historic sites experienced the largest YOY increase (+3pts).

Characteristics with Highest Correlations with Interest in Visiting





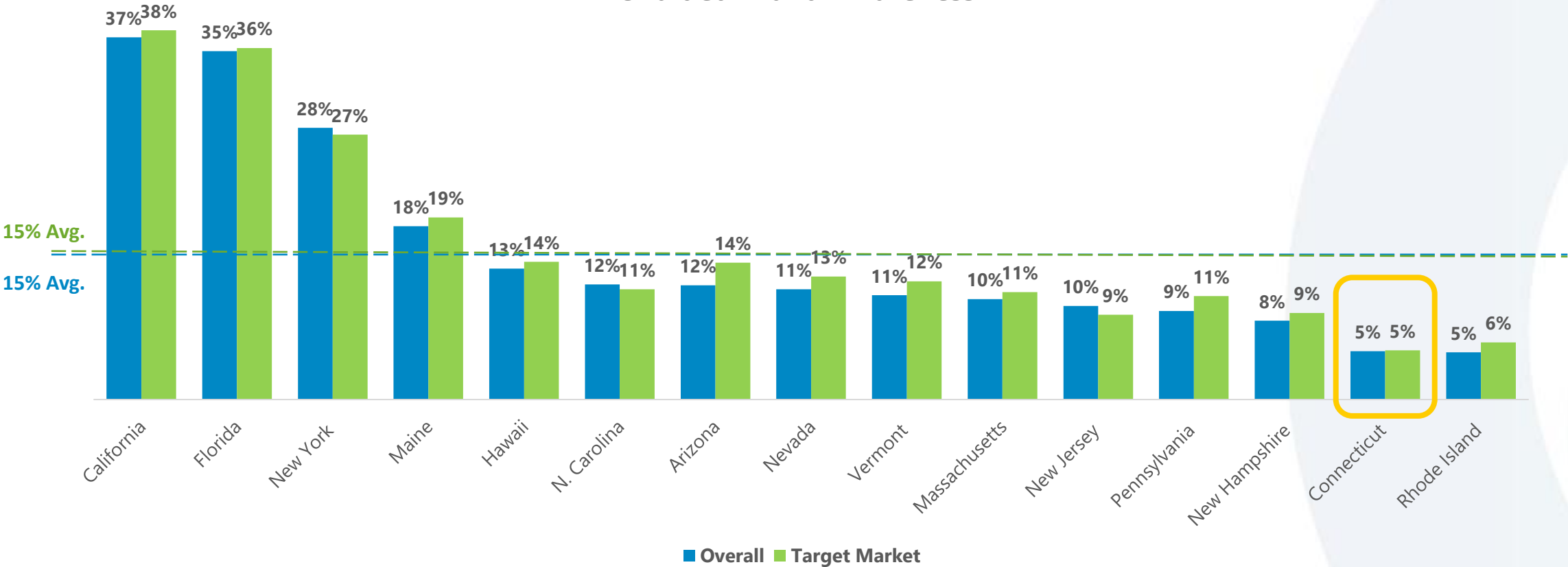
A city skyline at sunset, featuring a prominent yellow-domed building (likely the Connecticut State Capitol) and several modern skyscrapers with lit windows. The sky is a mix of orange, pink, and purple. In the foreground, there are green trees and a bridge. A large green diagonal shape covers the left side of the image, serving as a background for the text.

Connecticut 2019 Brand Awareness

# Key Performance Indicators

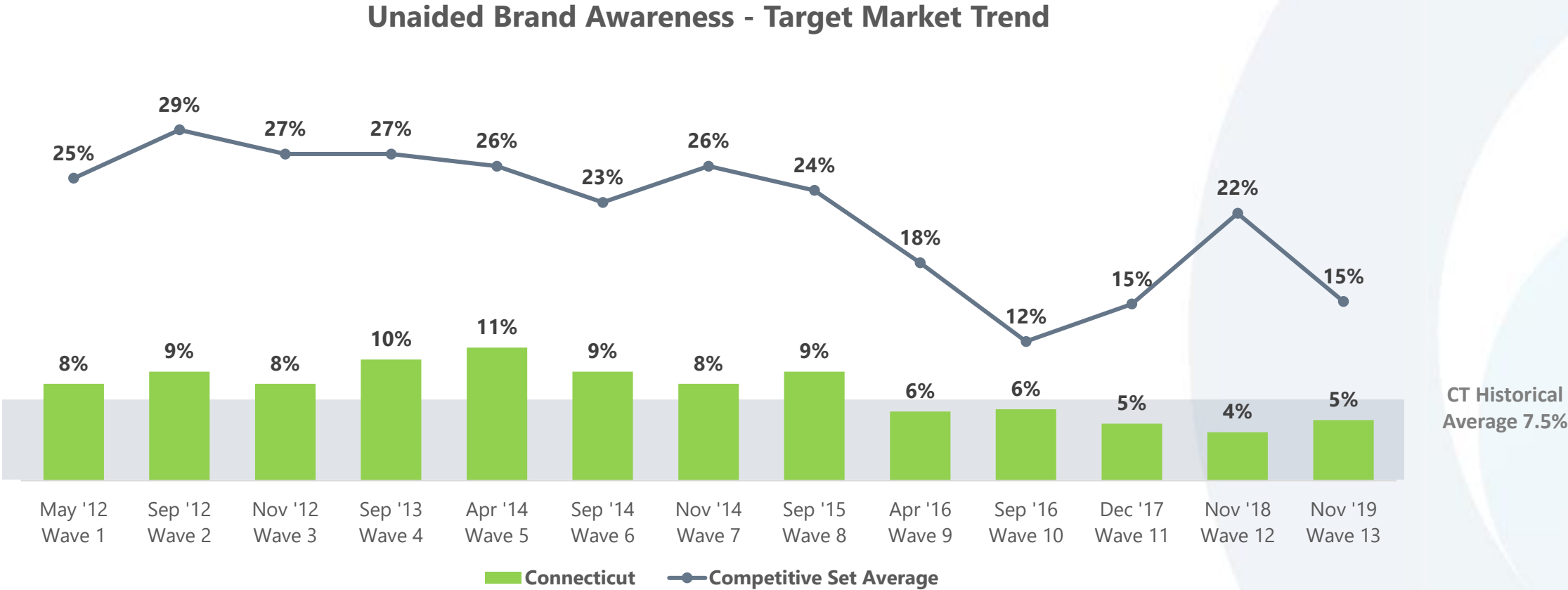
# Unaided Brand Awareness of Connecticut was on par with last year but is still a bit low compared to other states in the surrounding area.

Unaided Brand Awareness



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?

# Unaided Brand Awareness of Connecticut among the Target Market increased somewhat while Unaided Brand Awareness among competitive states declined by seven points which narrowed the gap.

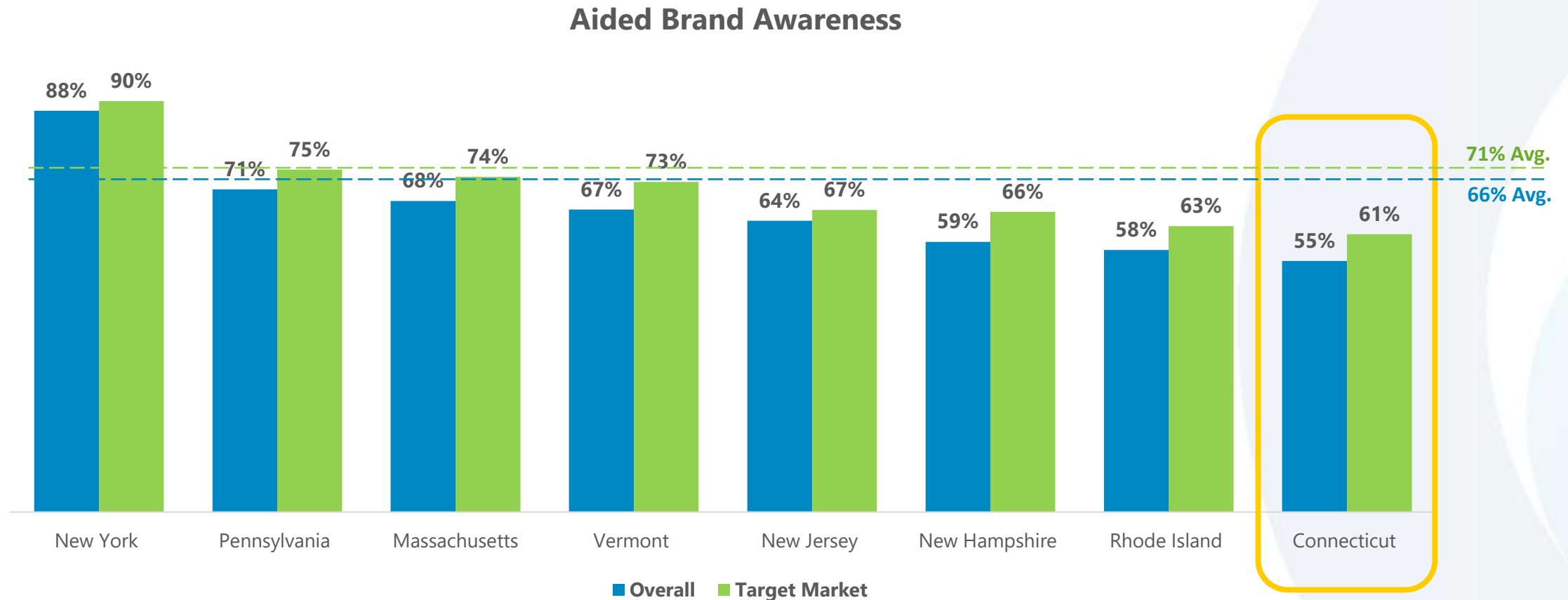


Q8: When you think about places to visit or travel to, please type the first STATE that comes to mind in the space below.

Q9: And, what other STATES do you think of as places to visit or travel to?



More than half of travelers are familiar with Connecticut as a travel destination, but this ratio trails the average among competitive set of states by 11 points.

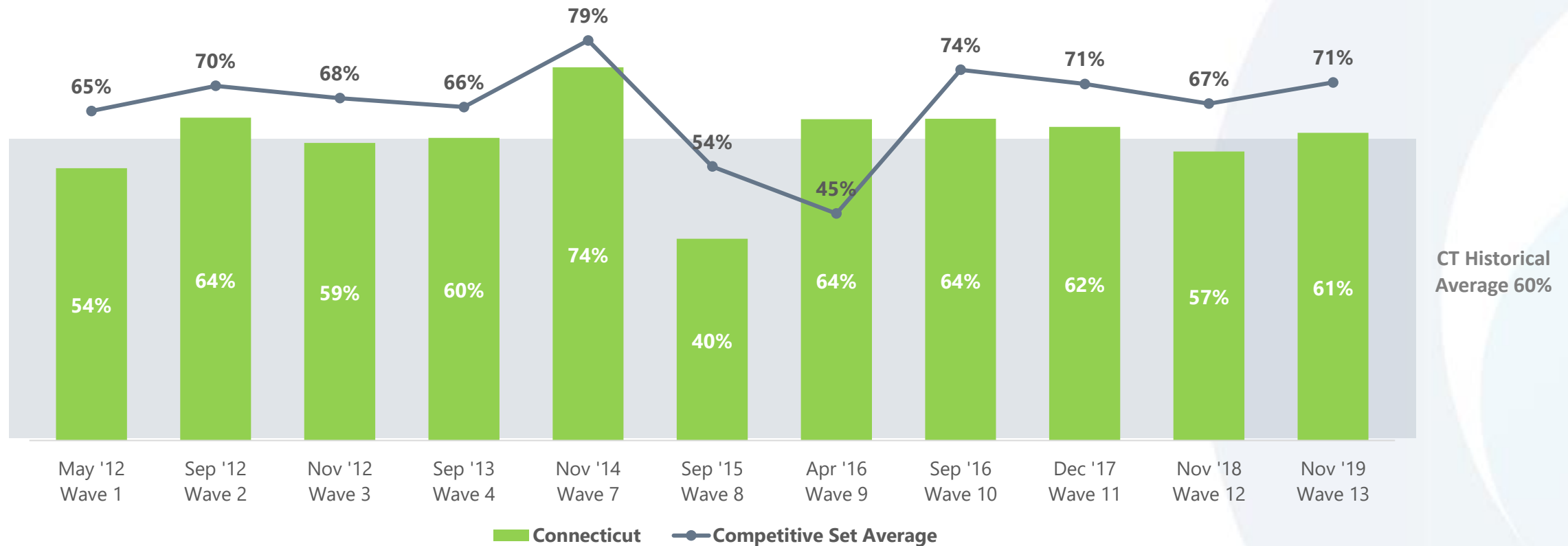


Q10: And, even if you just mentioned any of these states, which of the following STATES have you ever heard about as a place to visit or travel to? Select all that apply.

RESPONDENT BASE: OVERALL RESPONDENTS | N=2,200 26  
TARGET MARKET RESPONDENTS | N=1,088

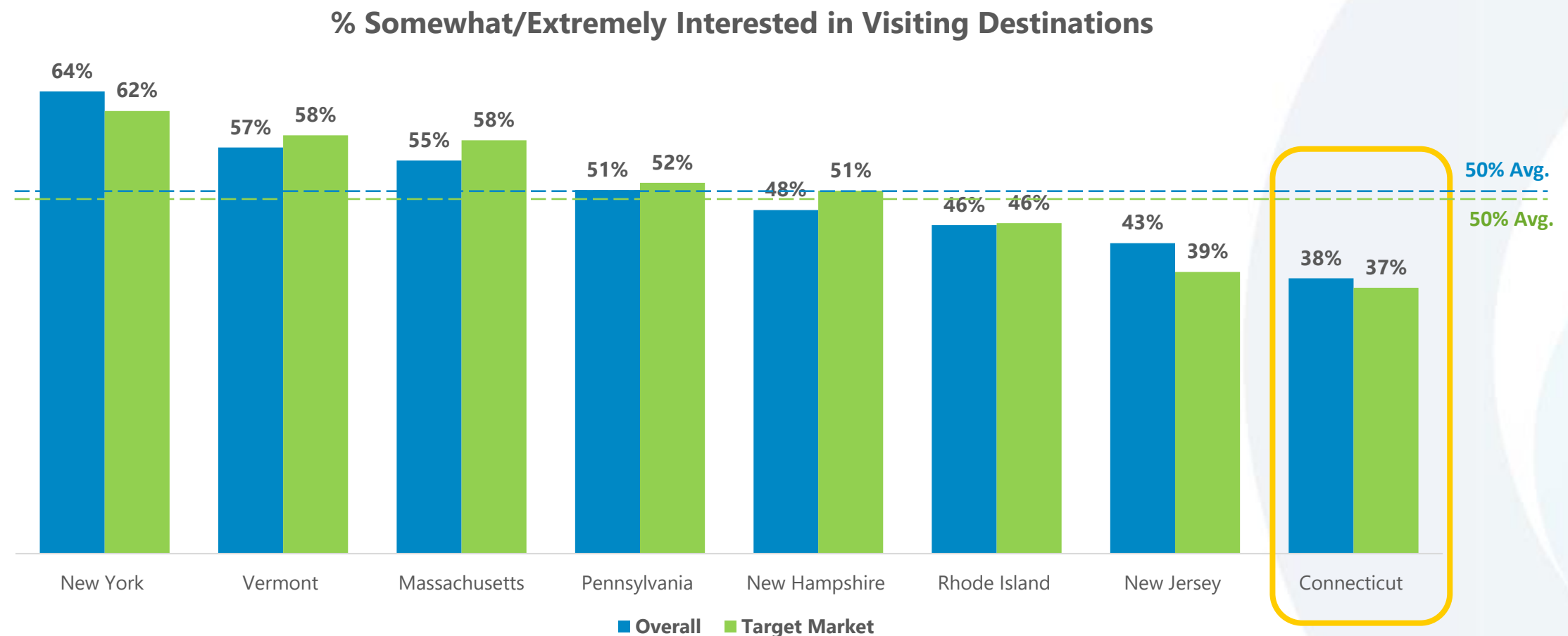
# Awareness of Connecticut as a travel destination among the Target Market increased by a significant four points this year, as did the awareness of competitive destinations.

Aided Brand Awareness – Target Market Trend



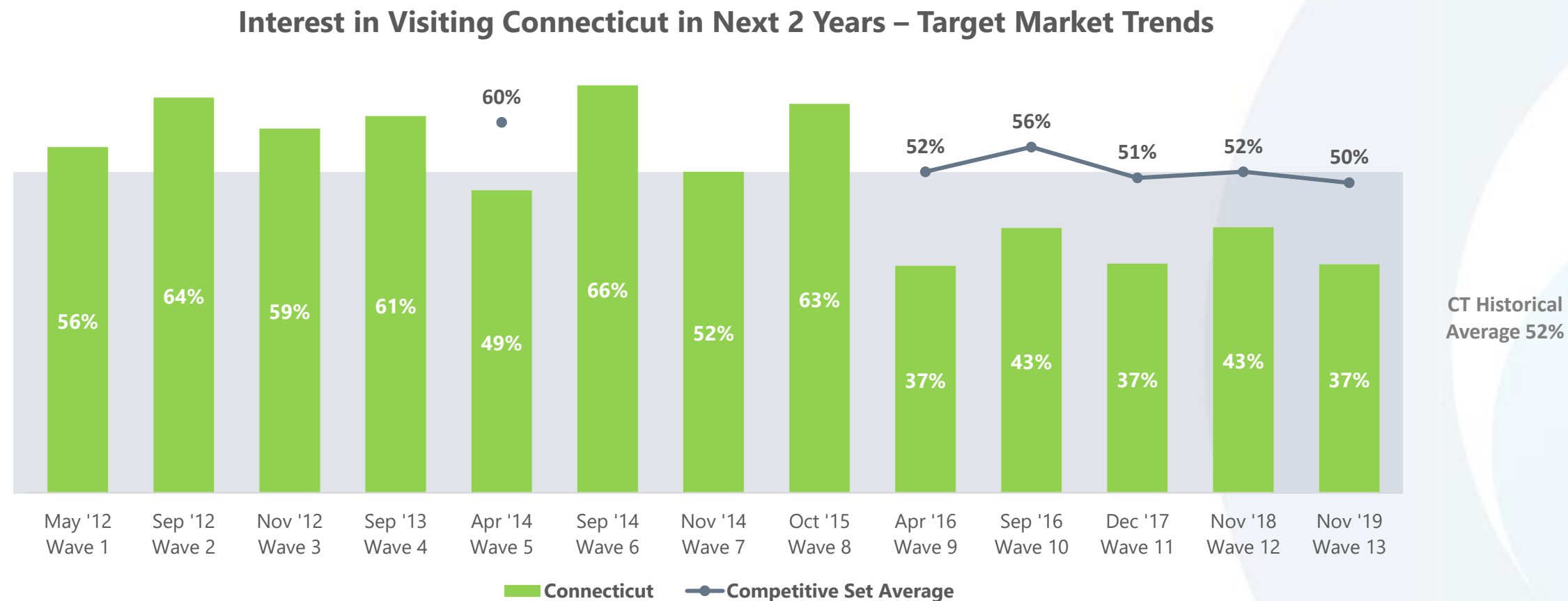
Q10: And, even if you just mentioned any of these states, which of the following STATES have you ever heard about as a place to visit or travel to? Select all that apply.

# Nearly four in ten travelers exhibit an interest in visiting Connecticut, on par with interest among the Target Market.

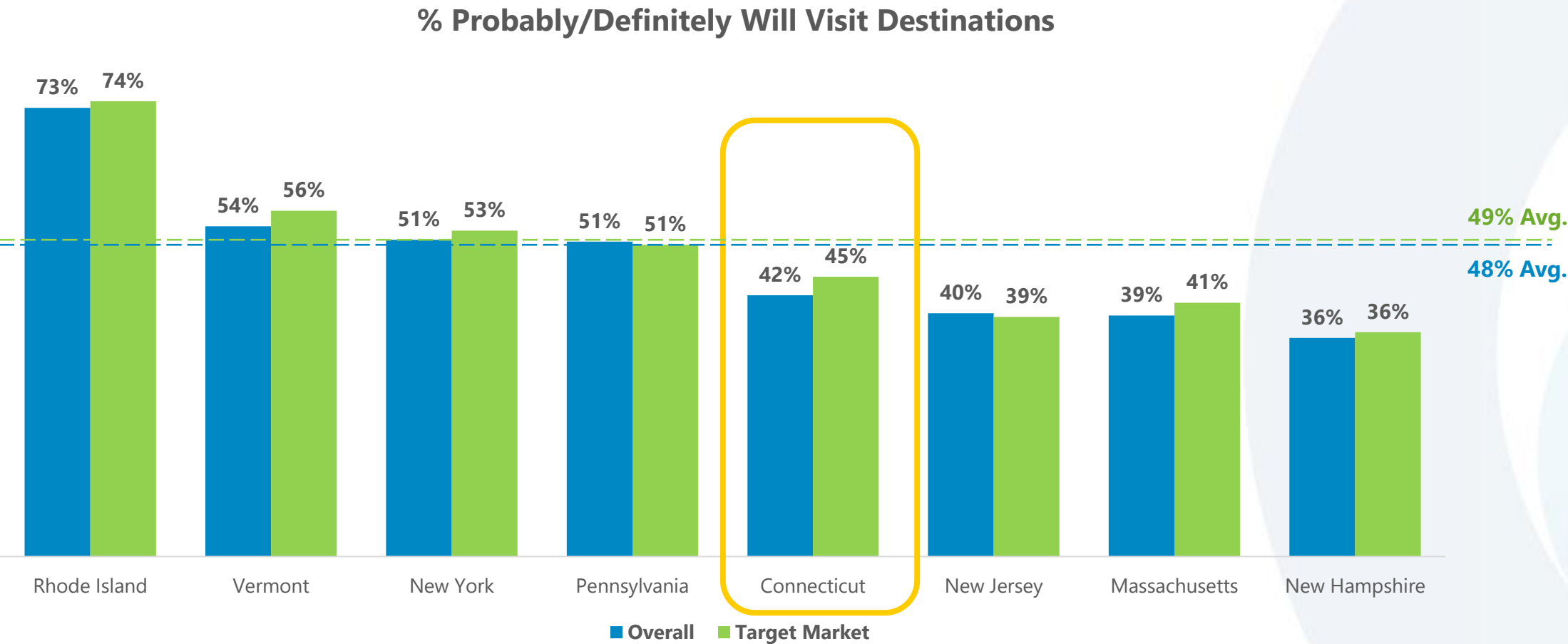




# Target Market interest in visiting Connecticut dropped by six points this year while interest in visiting other competitive destinations remained steady.

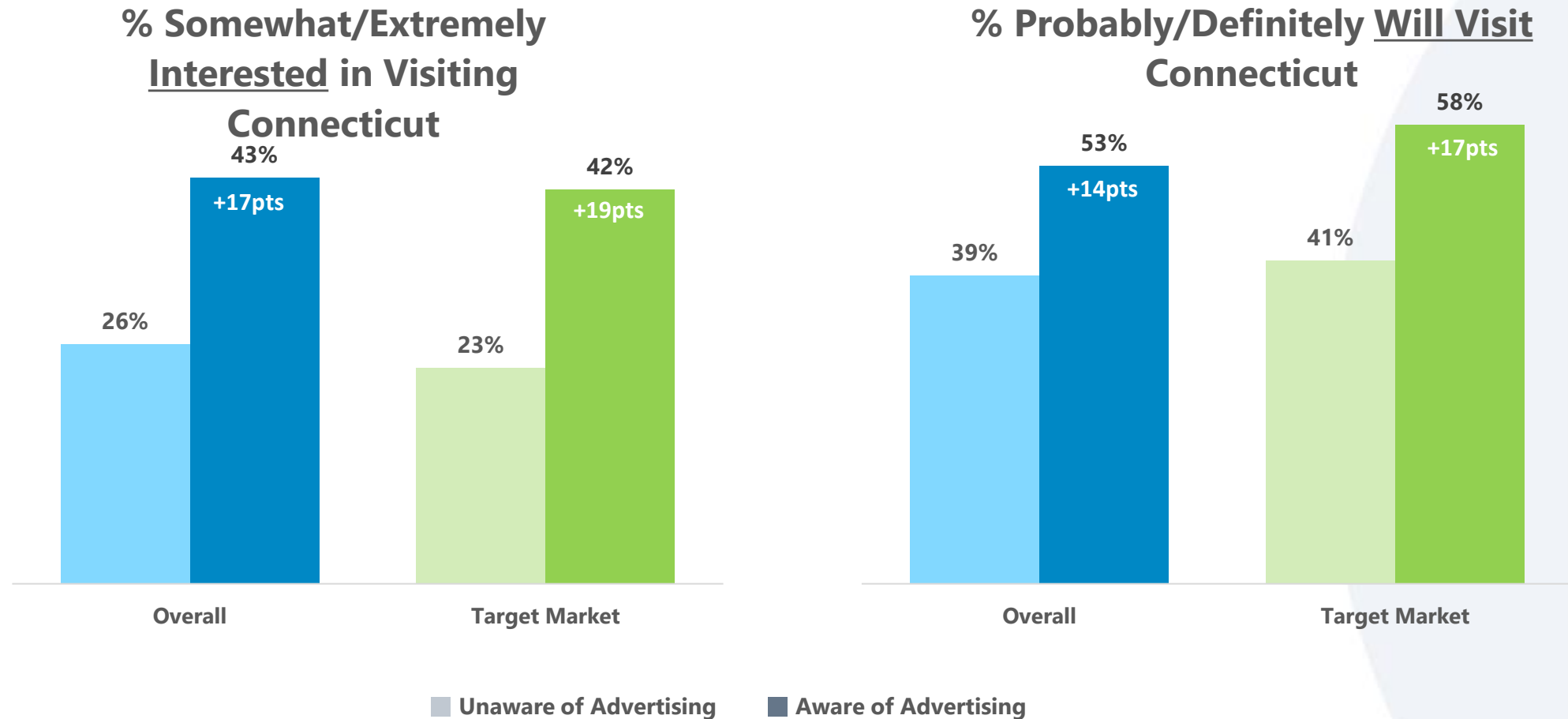


# More than four in ten travelers intend to visit Connecticut in the next 12 months, with 45% saying the same among the Target Market.



Q18b: 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)

Furthermore, the advertising increases both interest in visiting and future intent to visit significantly overall and among the target market.



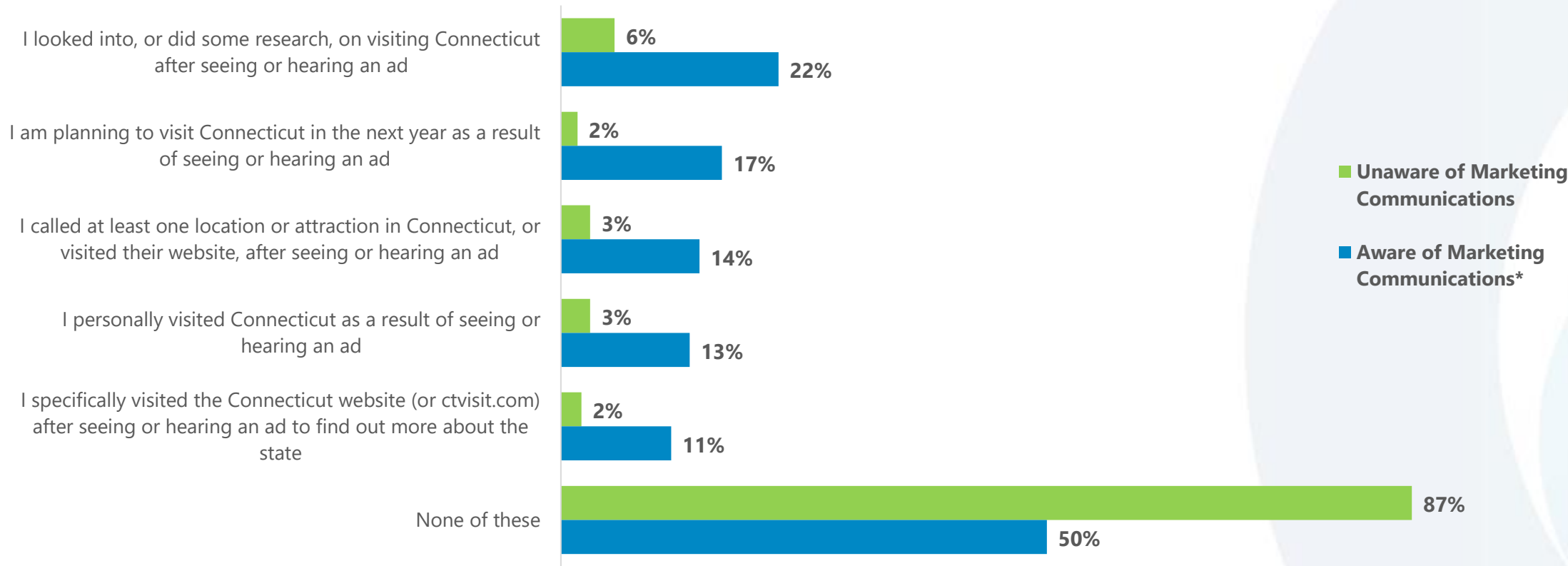
Q18a: How interested would you say you are in visiting each of the following destinations for a Northeast getaway during the next two years? Q18b: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months. (5-pt. scale)

RESPONDENT BASE: OVERALL RESPONDENTS | N=2,200  
TARGET MARKET RESPONDENTS | N=1,088




# Travelers who were reached by Connecticut’s marketing messages were much more likely to take positive action (50%) this year than travelers who were not (23%).

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.”*

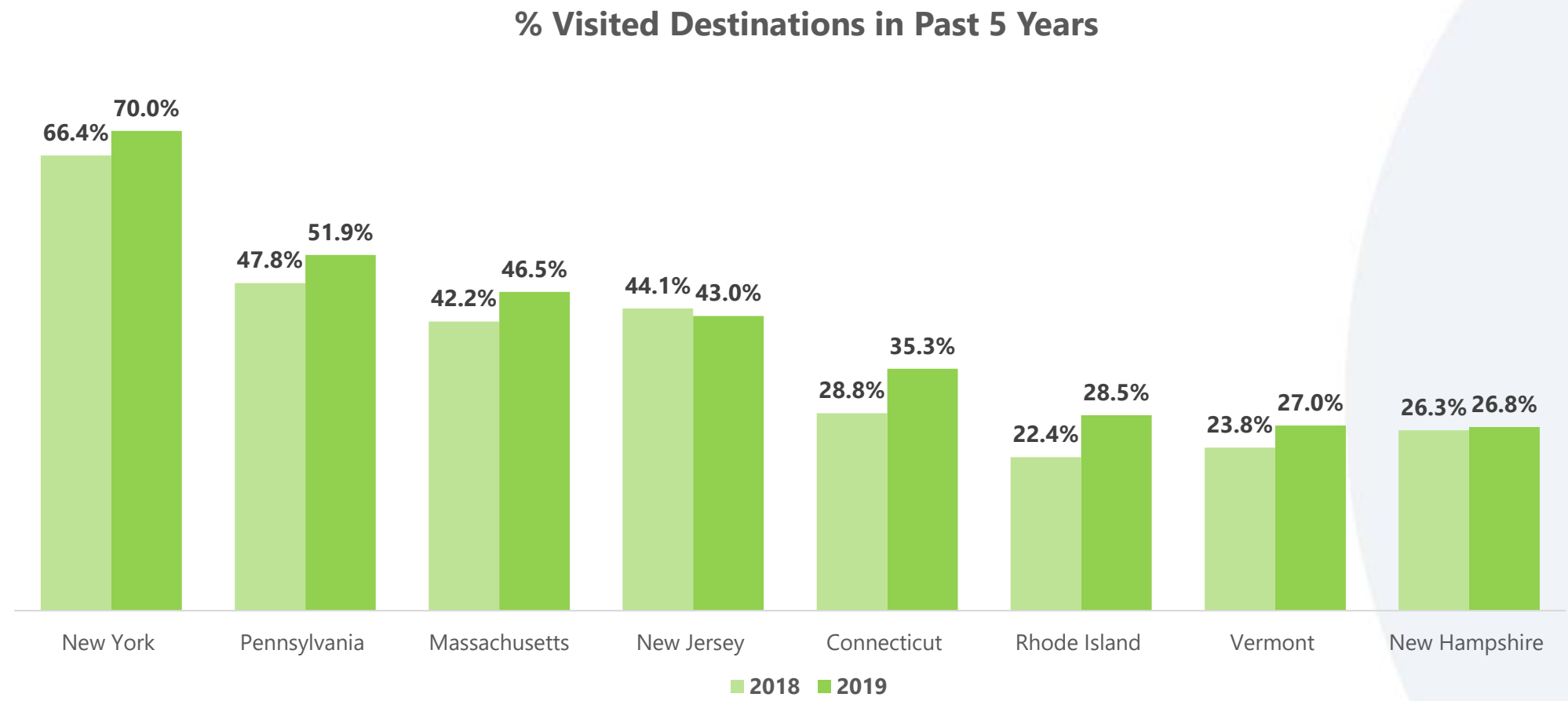
Q37: Which of these statements, if any, apply to you after seeing, hearing or reading any type of advertising message or news story for Connecticut in 2019? Select all that apply.



Connecticut 2019 Brand Awareness

# Brand Health Measurements

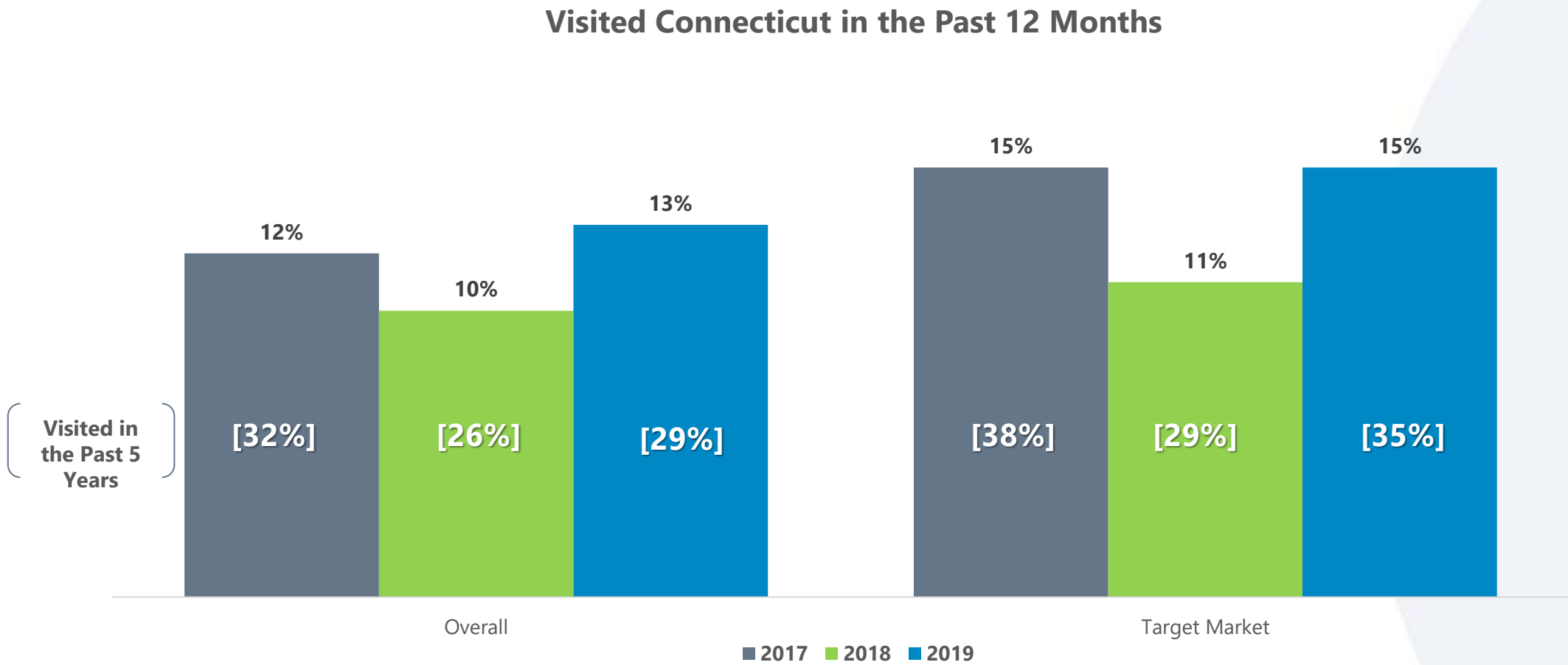
More than one-third of Target Market travelers visited Connecticut in the past 5 years. A 6.5-point increase over last year, and the largest increase in visitation among the target market of any destination in the competitive set.



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

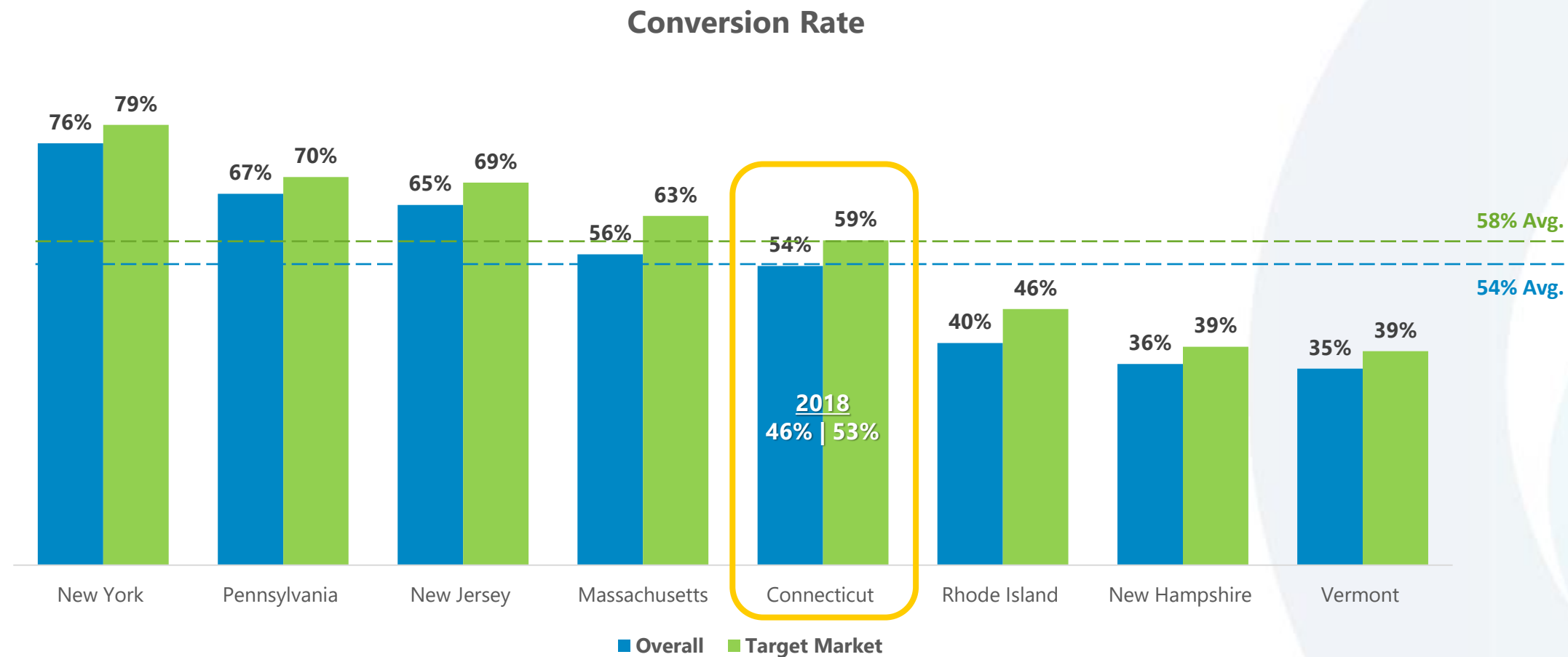


Visitation to Connecticut over the past five years increased compared to comparable figures last year, as did visitation in the past year among all travelers and Target Market travelers.



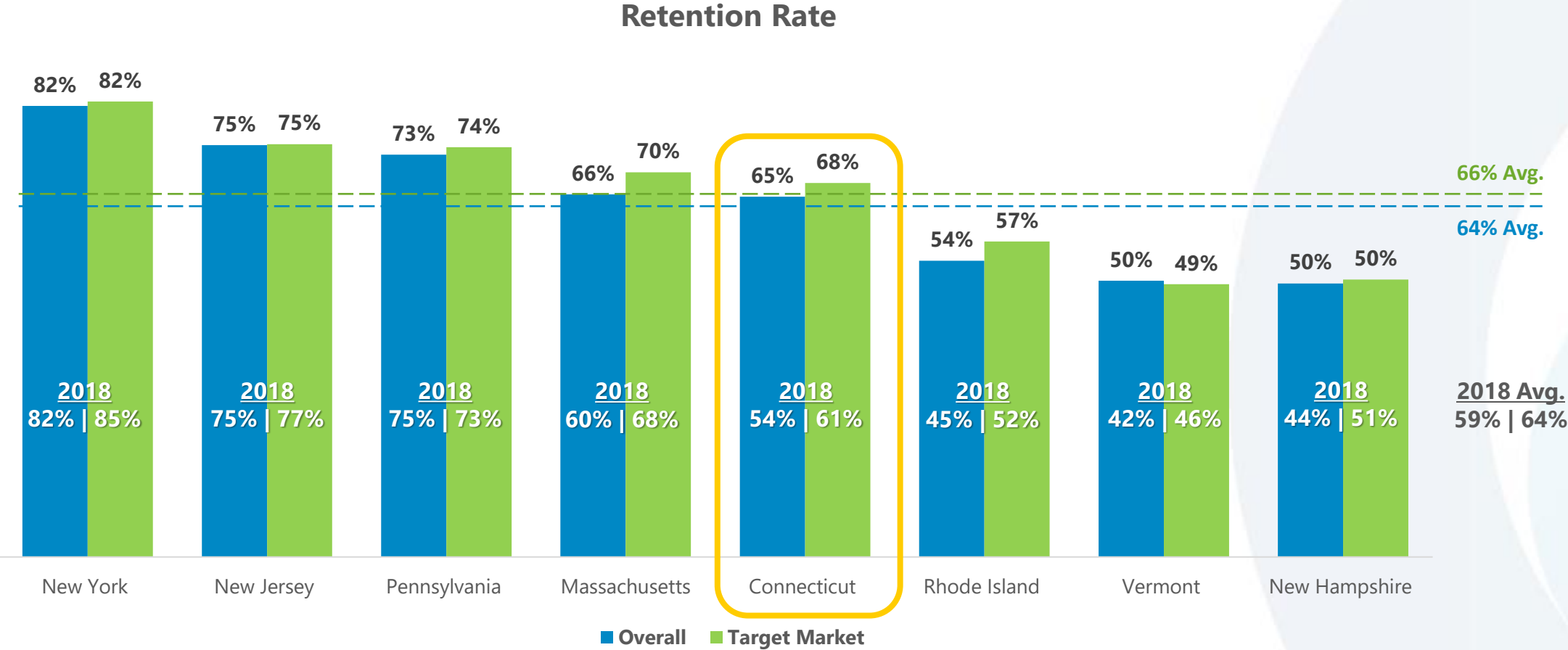
Q11: Using the scale provided, please indicate which of the following destinations have you visited for a getaway. (5-pt. scale)

Connecticut reached a conversion rate of 54%, an eight point increase over last year. Target Market conversion also increased from 53% to 59% this year.




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

Connecticut also significantly increased its retention rate among overall and Target Market travelers in 2019 (+11pts and +7pts respectively).



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



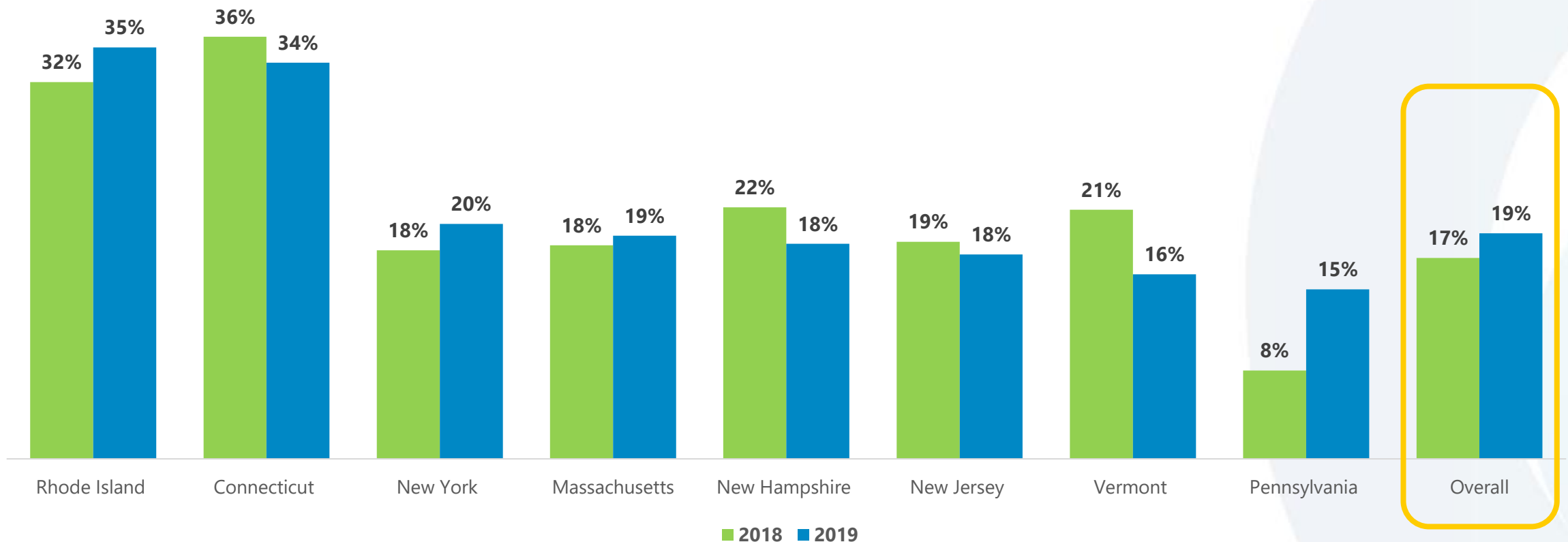


Connecticut 2019 Brand Awareness

# Marketing Communication Impact

Connecticut's overarching marketing awareness rebounded by two points overall this year and was driven by increases among Rhode Island, New York, Massachusetts and Pennsylvania travelers.

Connecticut Marketing Awareness by Market



Q14: 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 2019.

## Market Reach (Aware Traveler Households)

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

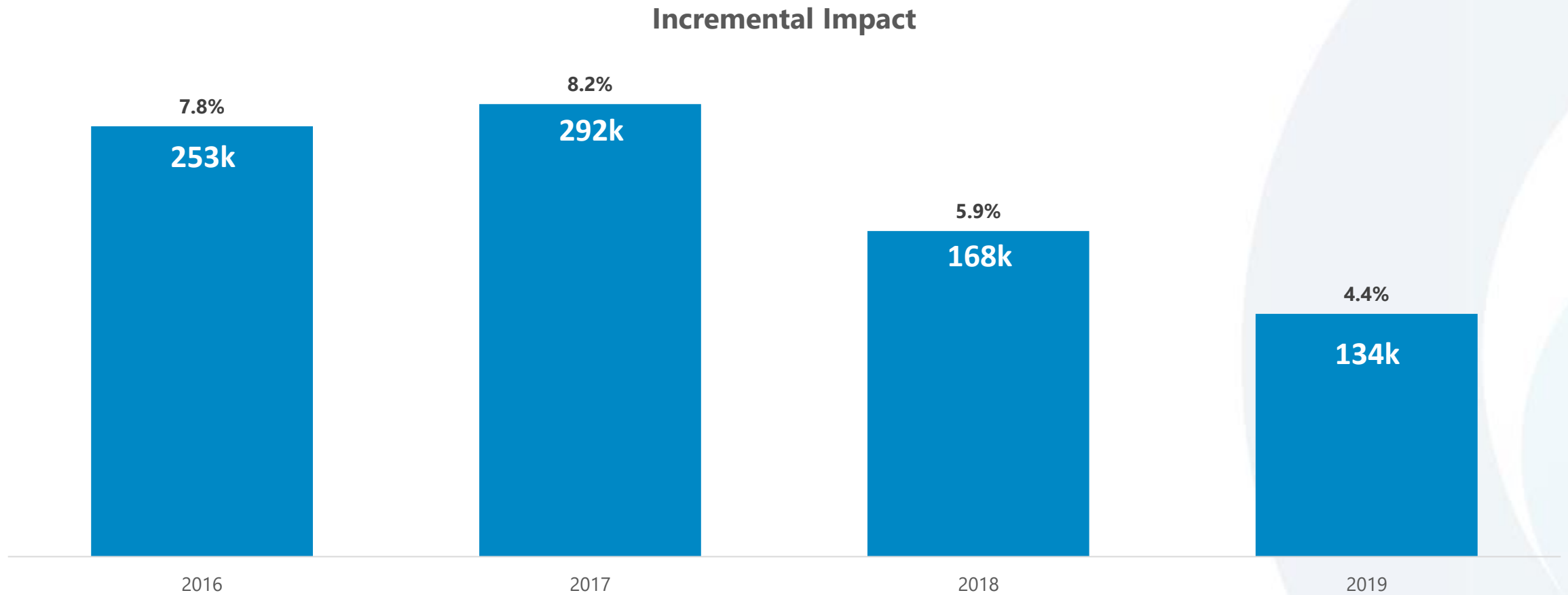
Overall Market Reach increased by 7% on a budget that was 1% lower than last year. This fueled a cost per aware travel household that was 7% more efficient than last year.

Market reach increased in the individual markets of New York, Massachusetts and Pennsylvania, stayed flat in Rhode island and declined elsewhere.

Market	2018 Market Reach	2019 Market Reach	% +/-
New York	1,045k	1,108k	+6%
New Jersey	478k	427k	-11%
Connecticut	396k	351k	-11%
Massachusetts	372k	376k	+1%
Pennsylvania	304k	551k	+81%
Rhode Island	107k	107k	-
New Hampshire	89k	73k	-18%
Vermont	44k	31k	-30%
<b>Total Market</b>	<b>2.83M</b>	<b>3.02k</b>	<b>+7%</b>
<b>Advertising Investment</b>	<b>\$2.02M</b>	<b>\$1.99M</b>	<b>-1%</b>
<b>Cost/Aware HH</b>	<b>\$0.71</b>	<b>\$0.66</b>	<b>-7%</b>



The incremental impact of the campaign remains positive (+4.4pts) as marketing-aware travelers more likely to visit Connecticut than those unaware of the marketing.



## Overall and Target Market Travelers who are aware of Connecticut advertising are significantly more likely to agree with statements regarding the state as a place to visit for leisure.

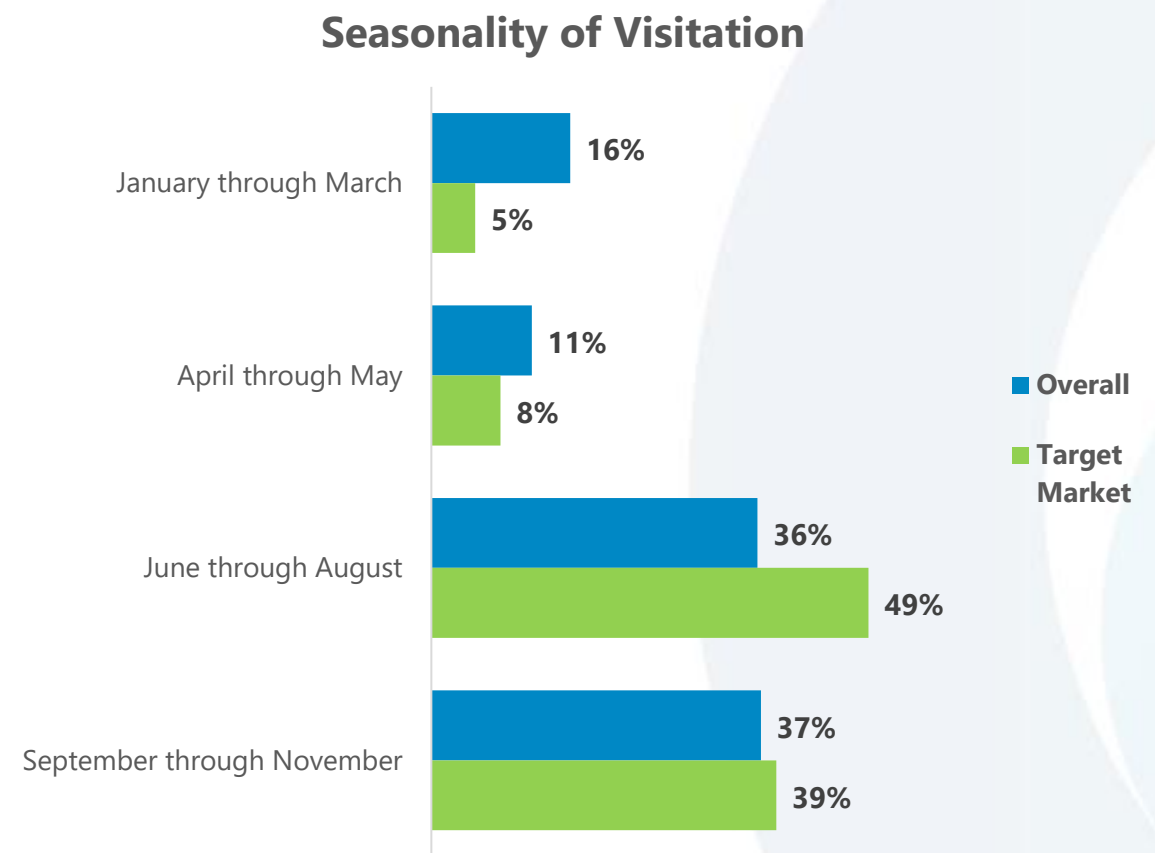
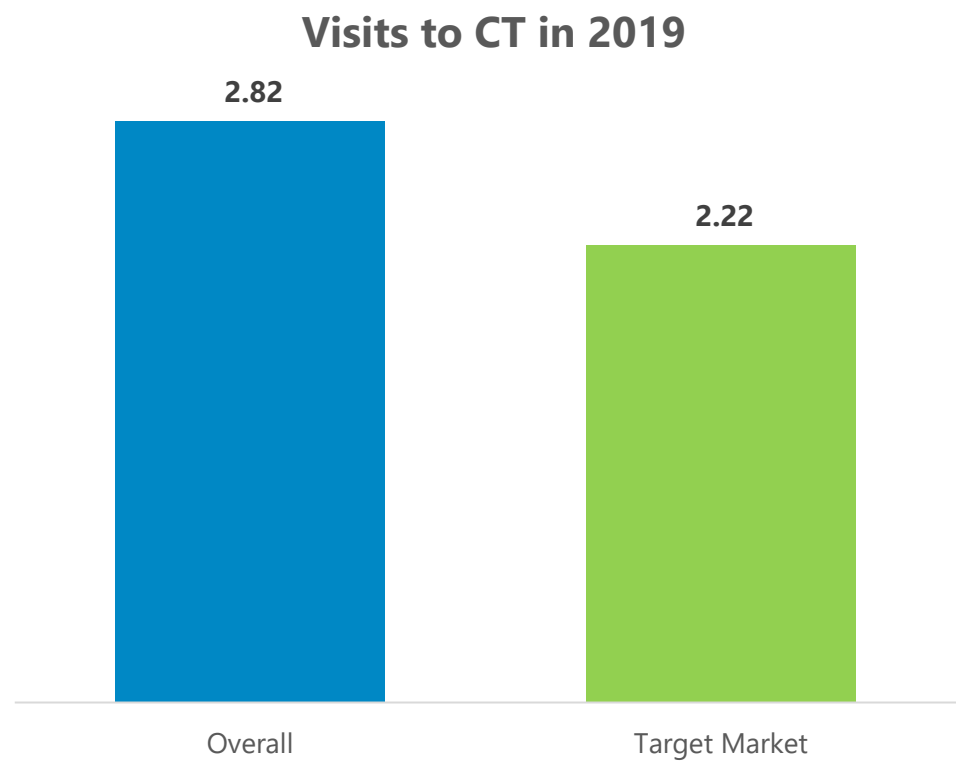
% Agree/Strongly Agree w/ Statements	Overall Aware of Ads	Overall Unaware of Ads	Target Market Aware of Ads	Target Market Unaware of Ads
Is a unique and important place to visit	47%	23%	43%	22%
Is a great place to spend time with my family	54%	31%	49%	32%
Is a place worth visiting in the future	54%	34%	51%	32%
Is a great place to spend time with my spouse/significant other	55%	33%	50%	32%
Has a lot to do	51%	31%	47%	28%
Has a wide range of resort amenities	49%	24%	47%	25%
Has a lot to do within a close proximity	58%	34%	56%	32%
Is a great place to go for a short getaway	61%	40%	59%	40%
Is a great place to be inspired	42%	21%	33%	19%
Is a dynamic, innovative state	41%	18%	34%	17%
Is a place with authentic experiences	49%	29%	42%	27%

Connecticut 2019 Brand Awareness

# Connecticut Visitor Behavior



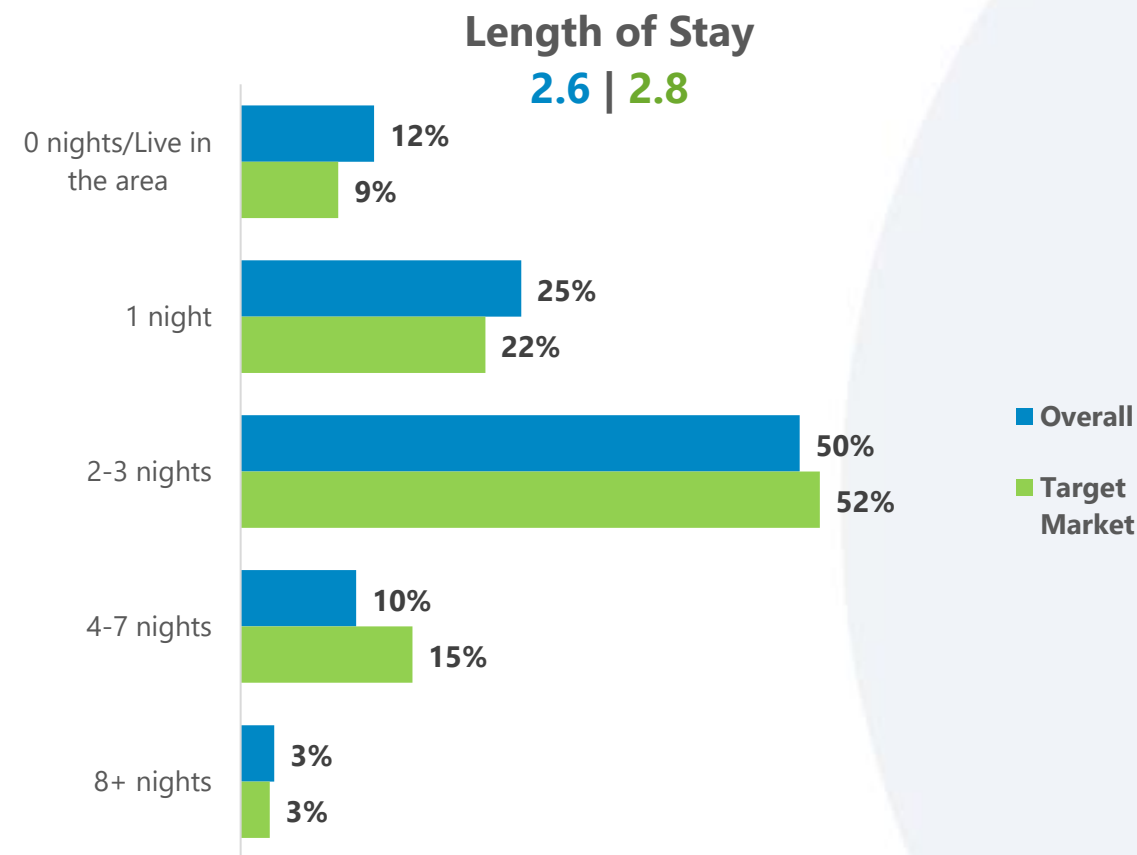
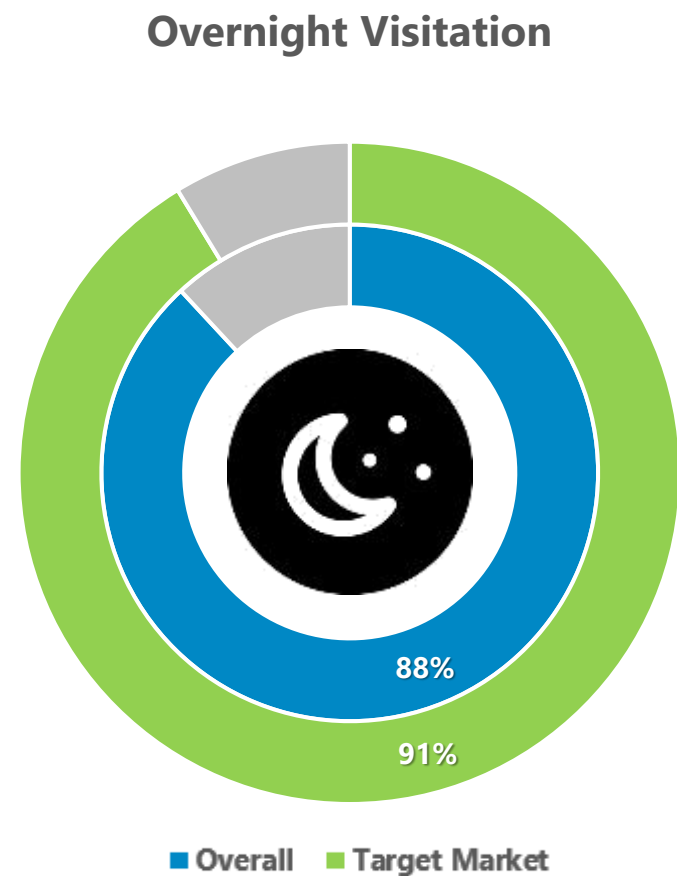
# New England travelers visited Connecticut an average of 2.8 times with the June through August timeframe being the most popular—especially among the Target Market.



Q23: How many times have you visited Connecticut for a getaway in 2019?  
Q24: In which of the following months have you visited Connecticut in 2019?



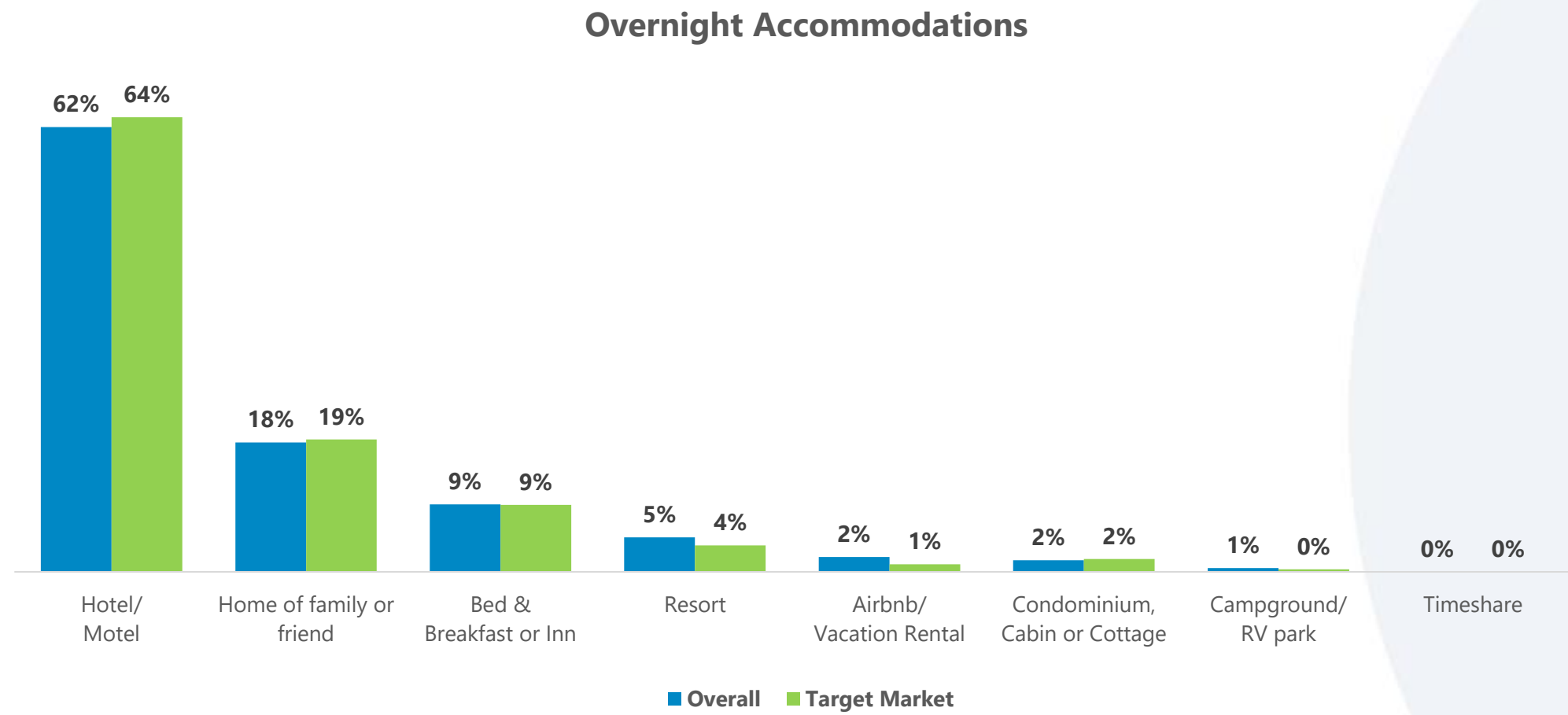
Similar to years past, the vast majority of Connecticut travelers stayed overnight in the state on their last visit with most staying nearly three nights.



Q29: 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 45  
TARGET MARKET VISITED CONNECTICUT IN THE PAST 2 YEARS | N=257

# Nearly two-thirds of overnight Connecticut visitors stayed in traditional lodging sources, followed by staying with friends/family, B&Bs or resorts.



Q30: Which of the following best describes the type of accommodations you used on your most recent trip?

RESPONDENT BASE: OVERALL OVERNIGHT VISITORS | N=523 46  
TARGET MARKET OVERNIGHT VISITORS | N=224

# Recent visitors to Connecticut are a bit older and have higher incomes than the average New England traveler this past year.

Category	Overall Respondents	2019 Visitors	Non-Visitors
Household Income	\$93.2k	\$96.6k	\$81.8k
Age of Respondent	45.2	49.6	42.3
25-34	28%	16%	35%
35-54	26%	42%	24%
55+ years	34%	38%	29%
Aided Brand Awareness	55%	100%	100%
Assisted Ad Awareness	18%	38%	21%
Interest in Visiting Next 2 Years	38%	62%	33%
Incidence of Visitation Last 5 Years	29%	100%	0%
White, Non-Hispanic	78%	84%	80%
Black, Non-Hispanic	6%	3%	8%
Hispanic	5%	6%	6%
Asian	7%	5%	6%
Other	6%	6%	4%



# Thank You!



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