



Connecticut[®]

2020 Brand Awareness Research

Report Prepared January 2021



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VOICE OF THE VISITOR RESEARCH

Overview

Purpose. The purpose of conducting the Connecticut Brand Awareness Research was 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.

Target Audience. The 2020 Brand Awareness Research was conducted among a general population cell of travelers living in Connecticut, Massachusetts, New Jersey, New York, Pennsylvania and Rhode Island. Respondents were further screened to ensure they have traveled for leisure in the past 2 years, are household decision makers, are age 25-64 and have an annual household income of \$75,000 or more. Throughout this report, the target audience is referred to as travelers.

Sample. A total of 1,000 respondents were interviewed for this study, providing for a maximum margin of error of $\pm 3.1\%$ at a 95% confidence interval.

Connecticut 2020 Brand Awareness Research

Key Takeaways

Connecticut's Positive Brand Perception

- Over the past several years, the Connecticut Office of Tourism has continued to increase the overall positive perception of the Connecticut brand as a travel destination. Connecticut continues to be best known for beautiful fall foliage (70%), beautiful scenery (64%) and its small interesting towns to explore (62%). Additionally, the words travelers are most likely to use to describe Connecticut are Historical (62%), Clean (60%) and Quaint (59%).
- And, as a place to live and work, Connecticut rated highest for having lots of educated young people to hire (57%), a place with a good quality of life (57%) and a great place to have kids and raise a family (53%).
- Connecticut scored on par with or higher than last year across more than 80 brand Attributes, Descriptors and Business Development characteristics that travelers rated.



Brand Health Remains Strong

- The Covid-19 pandemic has had an impact on the health of many travel brands as consumers have either been banned or imposed self-restrictions on their travel. New England was no exception to this as on average competitive states experienced a 5-point decline in aided brand awareness in 2020 compared to 2019. Connecticut's awareness declined by 7-points in 2020 compared to 2019 and reached 54%. And, as anticipated, 5-year average visitation to Connecticut dropped by 6-points in 2020.
- Similarly, Connecticut's conversion rate for 2020 stands at 55% – a 5-point decline over the 60% earned in 2019. This is not surprising as there is a lot of interest in visiting, but still some trepidation over actually making the trip due to the Covid-19 pandemic. Furthermore, the pandemic had an impact on retention rates as well, as many people weren't able to return to Connecticut in 2020 that may have planned to.
- Because of the lockdowns and decline in travel, interest in visiting all destinations—including Connecticut—in the next 2 years increased. The average destination saw 9-point increase in interest. However, the anxiety of the pandemic is still present as actual intent to visit destinations in the next 12 months stayed on par with historic levels.



Marketing Has a Positive Impact on Brand Perceptions

- Travelers saw advertising that inspired them to want to visit Connecticut. And seeing these communications had a big impact on the perceptions and actions travelers take. Travelers who had seen advertising were 32 points more likely to have an interest in visiting Connecticut in the next 2 years and 39 points more likely to intend to visit Connecticut in the next 12 months. Additionally, ad aware travelers are 6 points more likely to look into visiting Connecticut after seeing or hearing an ad.
- The takeaways that travelers get from the ads are also significantly impacted by having seen the ads prior to taking the survey—32 points on average. Ad aware travelers are 25 points more likely to agree that Connecticut is a great place to go for a short getaway, 28 points more likely to agree Connecticut is a place worth visiting in the future and 33 points more likely to agree Connecticut is a great place to spend time together.



SO GOOD
TO SEE YOU,
Connecticut

The background image is a photograph of the Connecticut State Capitol building at dusk. The building is a large, ornate structure with a prominent golden dome and multiple spires. It is illuminated by warm lights, and a flag flies from a tall pole on the right side. The building is set against a clear blue sky. In the foreground, there is a green lawn with some fallen leaves. A dark, semi-transparent diagonal shape covers the left side of the image, serving as a background for the text.

Connecticut 2020 Brand Awareness Research

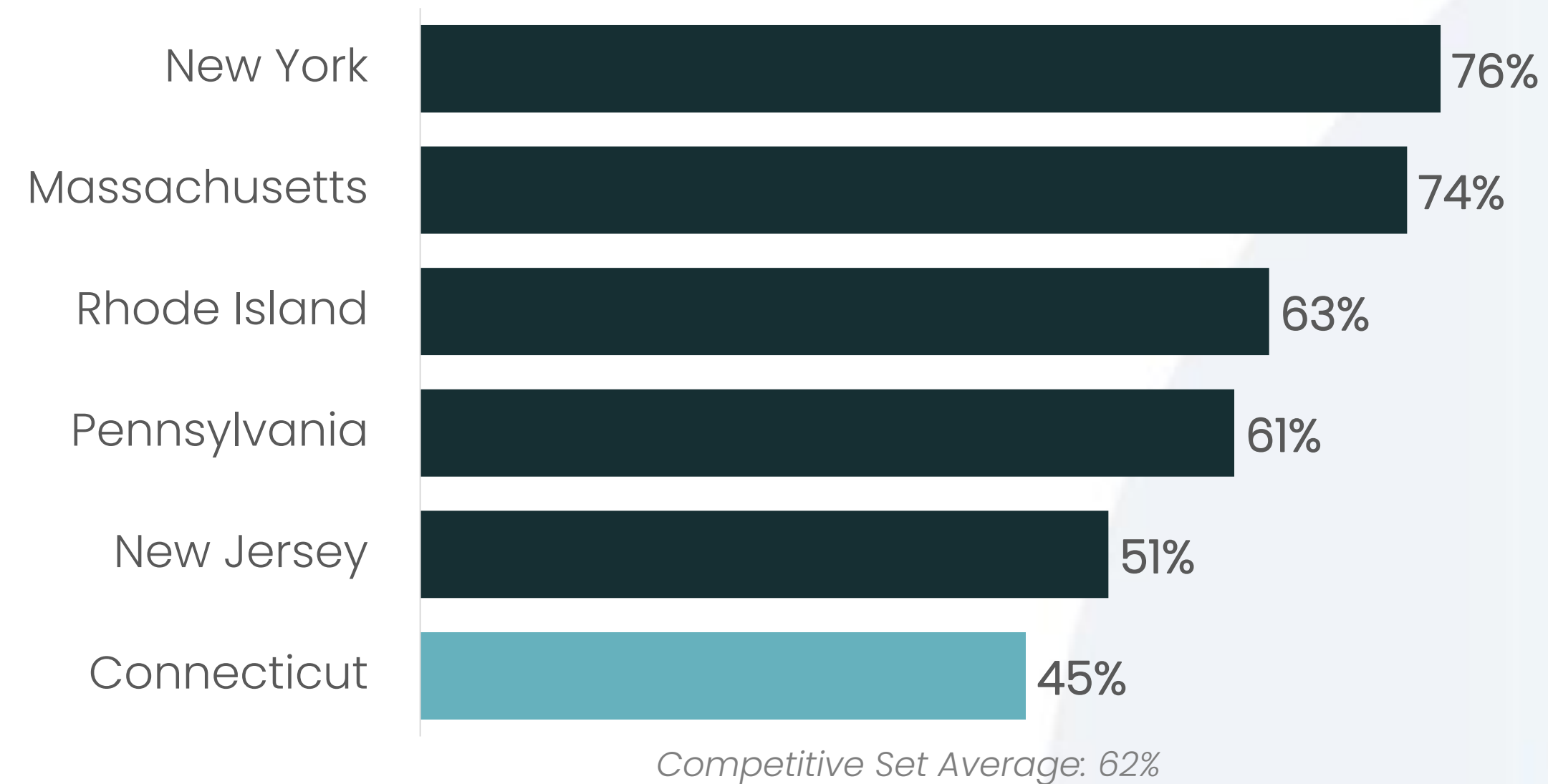
Brand Perception

Resident State Pride

Connecticut residents continue to become increasingly proud of their home state. In 2020, pride rose by 7-points to top the historical average for the first time since 2014.

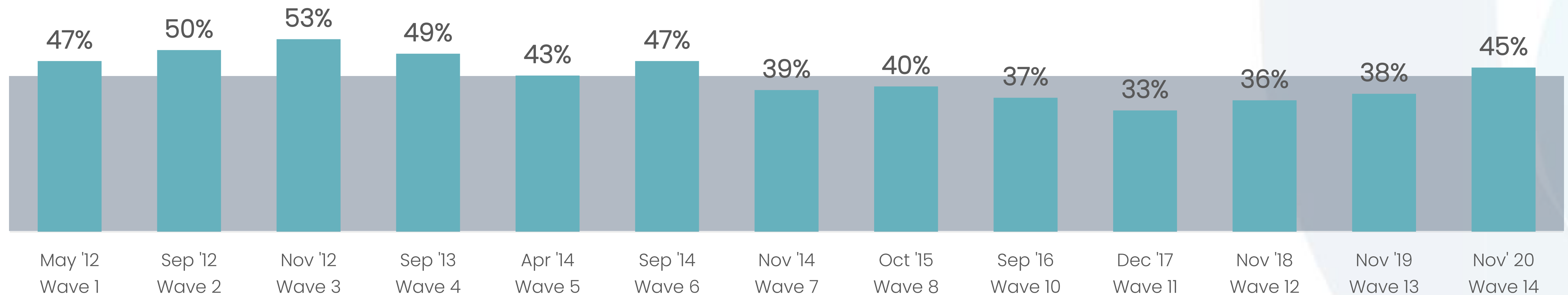
However, resident pride for Connecticut continues to trail all other states surveyed in 2020. Connecticut trails the competitive set average by 21 points, the same as measured in 2019, but is much better than the gap of 29 points seen in both 2018 and 2017.

% Very/Extremely Proud to Be a Resident of Their State



Connecticut State Pride History

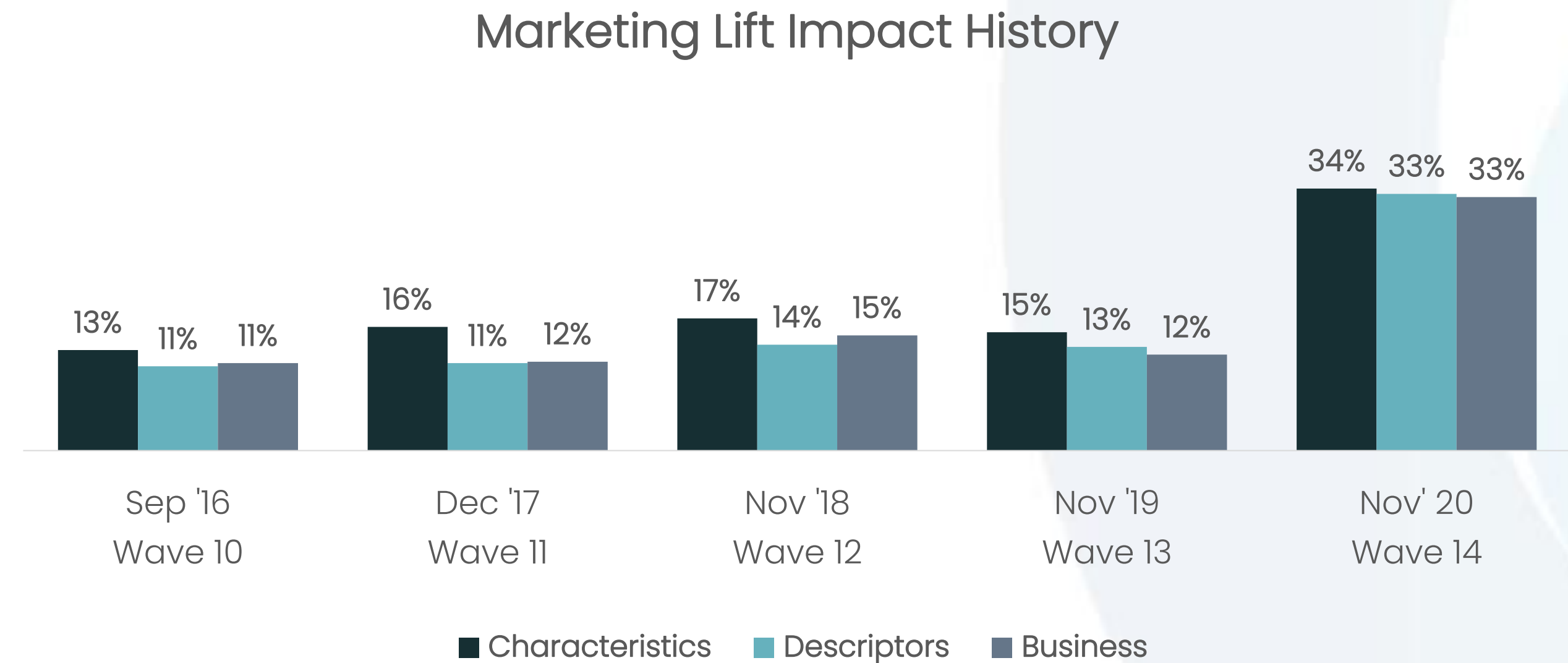
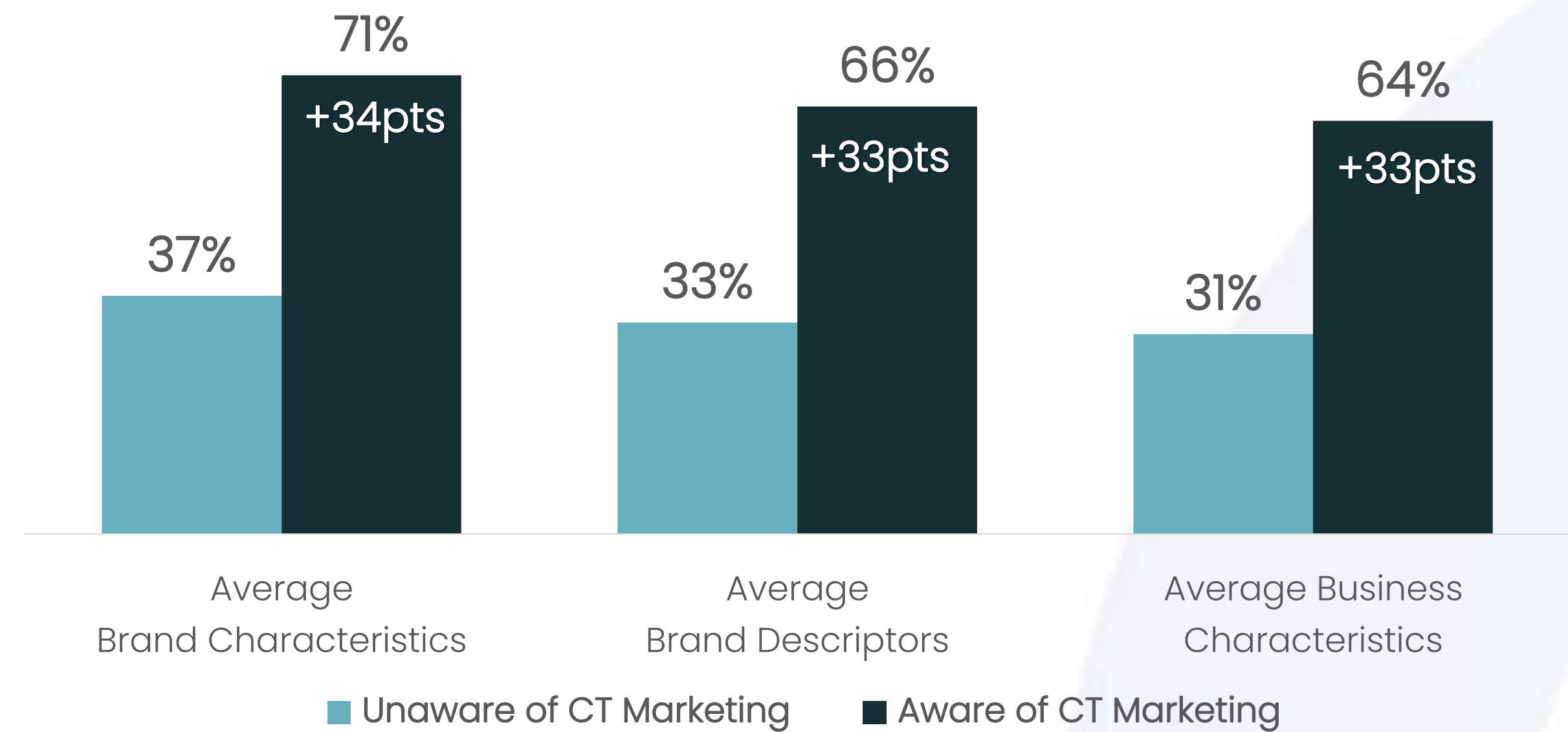
CT Historical Average: 43%



Connecticut Brand Ratings

Connecticut continues to earn high ratings among the characteristics, descriptors and business characteristics tested. Furthermore, marketing efforts continue to have a positive impact on those perceptions.

Over the years, Connecticut’s marketing efforts have created a lift in the perceptions of travelers. Even in 2020, when travelers were homebound more than ever, those who saw marketing from Connecticut had a significantly higher perception of the state than those who didn’t see marketing. Furthermore, the lift in 2020 was more than double that seen in the past.



Travelers' perceptions of Connecticut increased across every category of characteristics measured—the majority of which posted significant increases in scores.

Describes CT well/extremely well	2020	2019		2020	2019
Has beautiful fall foliage	70%	66%	▲	Has great antiquing	51% 41% ▲
Offers beautiful scenery	64%	67%		Offers a romantic escape	51% 46% ▲
Has interesting small towns to explore	62%	63%		Is a fun destination	50% 46% ▲
Has lots of historic sites to visit	61%	54%	▲	Has nice resorts/spas	50% 45% ▲
Offers casino entertainment	59%	50%	▲	Offers "pick your own" farms	49% 41% ▲
Offers a sense of history as part of the landscape	59%	57%		Offers arts and culture	48% 45%
Great place to rest and relax	58%	52%	▲	Has great shopping	48% 43% ▲
Great place to spend time with my spouse/significant other	57%	52%	▲	Has vineyards/wineries	48% 45%
Offers great inns/B&Bs	56%	52%	▲	Great place to spend time with children	48% 38% ▲
Is a good place for hiking/biking	55%	50%	▲	Is a good place for fishing	46% 38% ▲
Has friendly, welcoming people	54%	49%	▲	Has great beaches	46% 38% ▲
Is a good place for boating	54%	41%	▲	Good place for golfing	45% 34% ▲
Has lots of things to see and do	54%	49%	▲	Offers a good value for the money	45% 41% ▲
Great place to spend time with my friends	53%	48%	▲	Offers action/adventure sports (e.g. zip lining, rock climbing)	41% 32% ▲
Has winter activities	51%	47%	▲	Offers exciting nightlife	40% 31% ▲
Offers great culinary experiences	51%	47%	▲	Has great theatre	38% 29% ▲

Q22: 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 2019 scores.

RESPONDENT BASE: ALL RESPONDENTS | N=1,000

Furthermore, the words used to describe Connecticut also posted increases across the board when compared to 2019.

Describes CT well/extremely well	2020	2019		2020	2019
Historical	62%	64%	Artsy	46%	43%
Clean	60%	57%	Sophisticated	46%	45%
Quaint	59%	57%	Vibrant	46%	38% ▲
Close by	59%	59%	Affordable	44%	40% ▲
Traditional	58%	60%	Contemporary	44%	39% ▲
Welcoming	54%	52%	Pretentious	44%	36% ▲
Upscale	53%	52%	Diverse	44%	40% ▲
Nature-oriented	53%	50%	Trendy	44%	33% ▲
Authentic	53%	50%	Exciting	42%	37% ▲
Friendly	52%	51%	Inspiring	42%	35% ▲
Fun	50%	46% ▲	Revolutionary	41%	35% ▲
Smart	50%	44% ▲	Innovate	40%	30% ▲
Cultural	49%	49%	Bold	37%	29% ▲
Down-to-earth	48%	45%	Unexpected	37%	28% ▲
Fresh	47%	38% ▲			

Q23: 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 2019 scores.

RESPONDENT BASE: ALL RESPONDENTS | N=1,000

And, the perception of Connecticut as a place to do business grew significantly more positive over the past year.

Describes CT well/extremely well	2020	2019
Has lots of educated people if you are hiring	57%	54%
A place with a good quality of life	57%	57%
Great place to have kids and raise a family	53%	49% ▲
A progressive state	51%	46% ▲
Great place to live	50%	47%
Place with creative people	48%	44% ▲
A great place to meet interesting people	48%	43% ▲
Has lots of quality skilled labor if you are hiring	47%	41% ▲
Place with innovative people	46%	41% ▲
Great place to work	46%	37% ▲
State with lots of diversity	46%	39% ▲
A state with a lot of growth	46%	38% ▲
A great place for businesses to network	46%	37% ▲
Friendly to businesses	45%	37% ▲
A dynamic, innovative state	43%	34% ▲
A place of ingenuity	42%	36% ▲
Great place for innovation	41%	34% ▲
Great place to start up a business	41%	32% ▲
Great place to relocate an existing business	40%	32% ▲
A place you can get things done quickly	40%	32% ▲

Q24: 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)

RESPONDENT BASE: ALL RESPONDENTS | N=1,000

Connecticut 2020 Brand Awareness Research

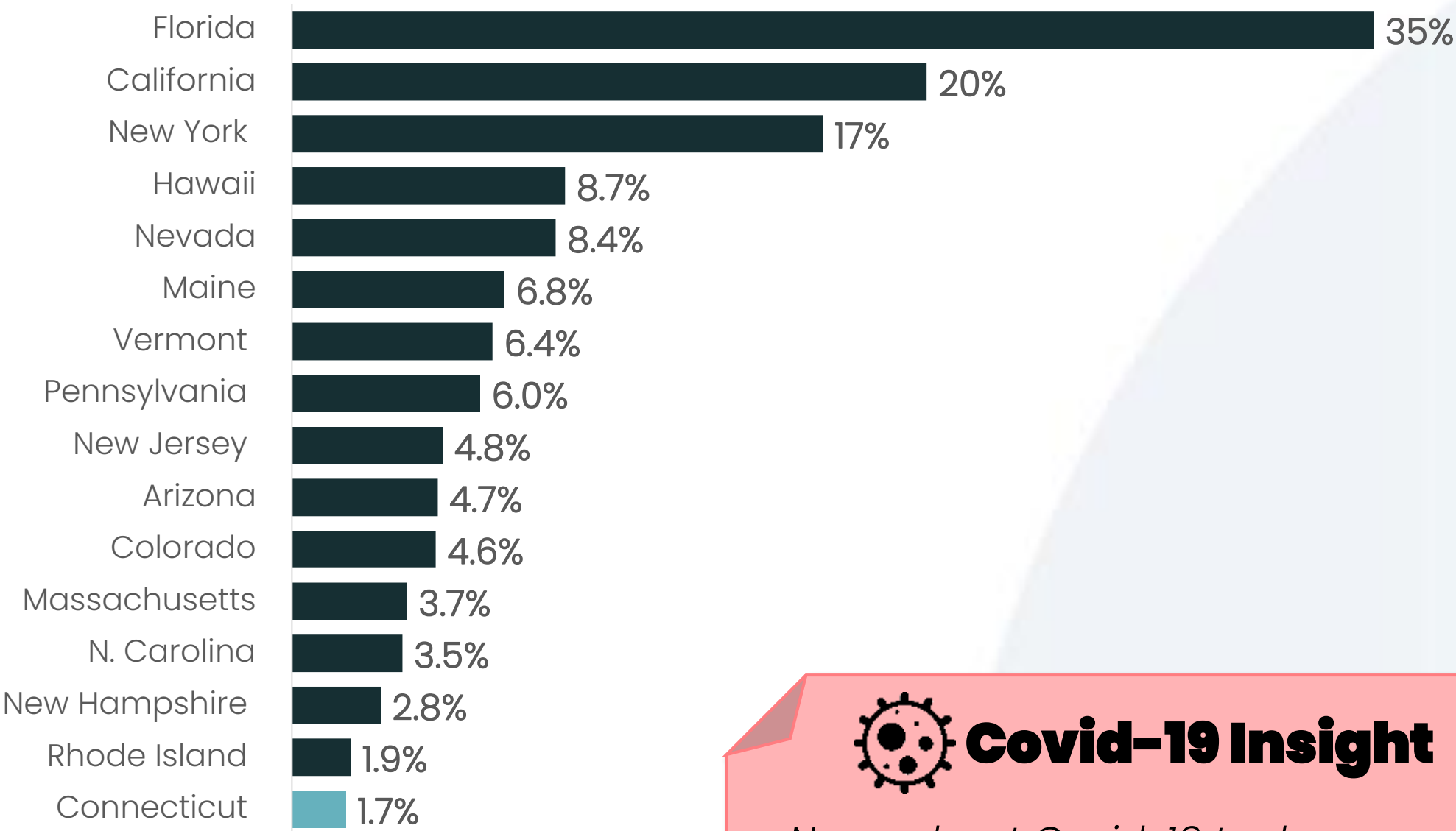
Brand Health Measurements


Unaided Brand Awareness

The pandemic and political news that dominated the world pushed top of mind thinking about travel far down the list of priorities this year.

In fact, on average, competitive destinations saw a 5-point decline in top-of-mind awareness in 2020. The good news is, Connecticut's top-of-mind awareness dropped only 3 points comparatively.

Unaided Brand Awareness – Competitive States

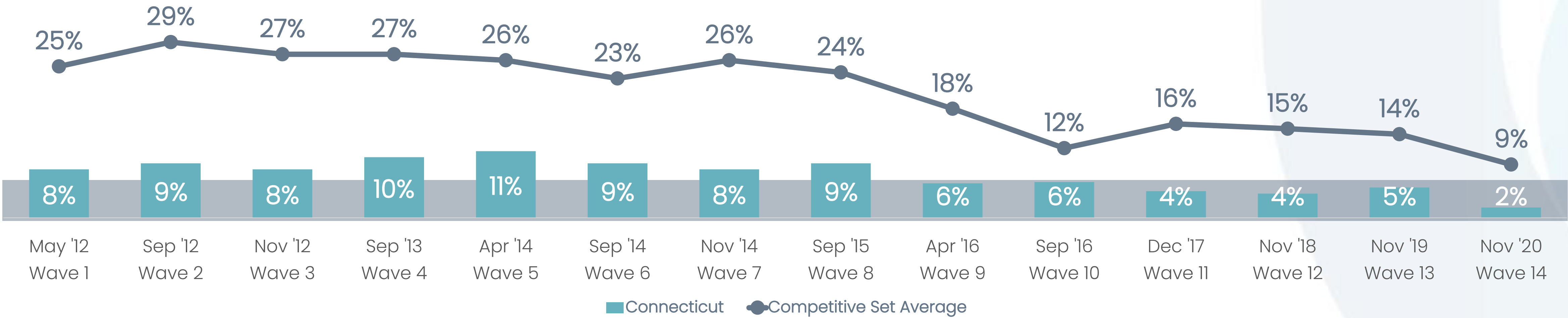


**Covid-19 Insight**

News about Covid-19 took over and pushed thoughts about travel destinations far out of people's minds.

Unaided Brand Awareness History

CT Historical Average: 7%

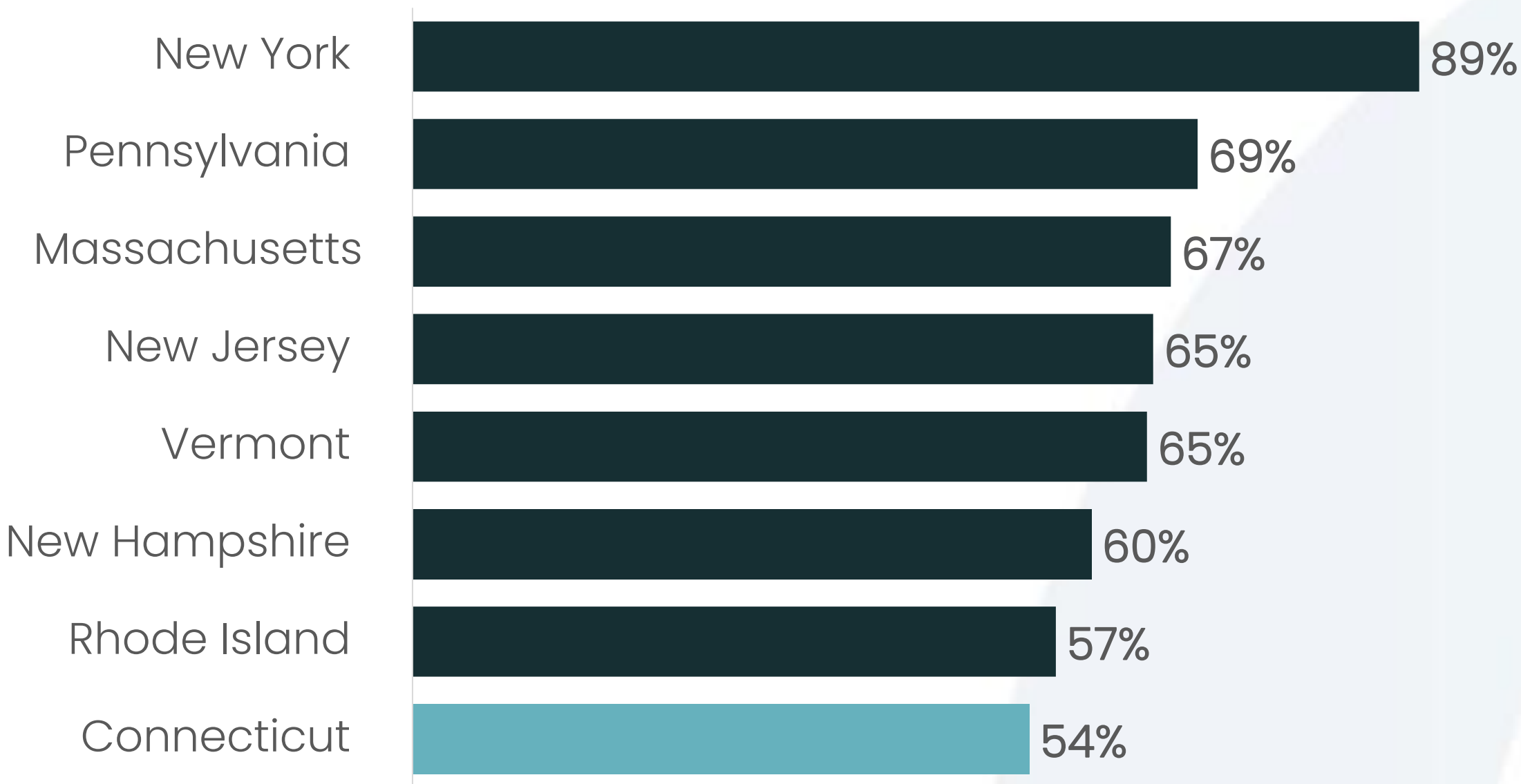


Aided Brand Awareness

More than half of travelers in New England age 25-64 are aware of Connecticut as a place to visit or travel to.

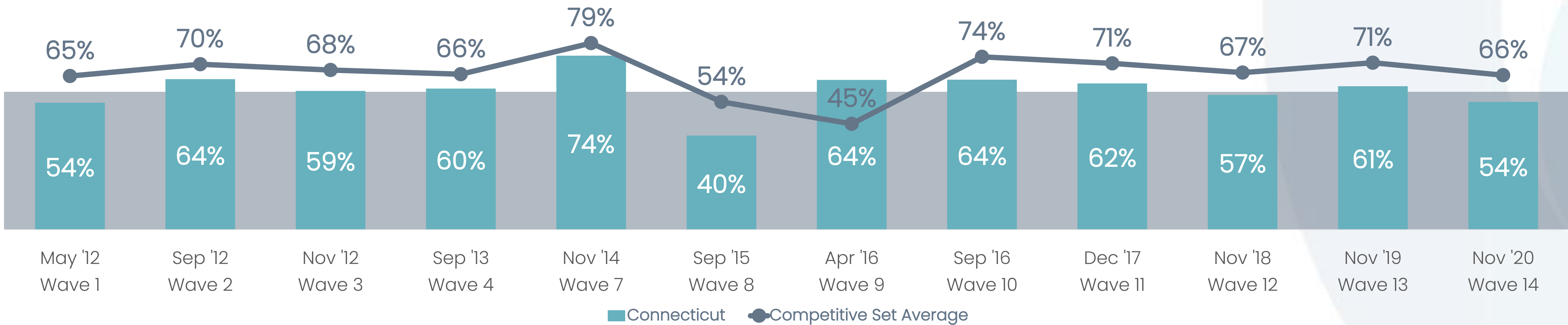
Awareness saw a 7-point decline compared to last year—not surprising given the state of the country in 2020 and the amount of information occupying travelers’ minds and screens. On average, competitive states saw a 5-point decline in awareness compared to last year as well.

Aided Brand Awareness – Competitive States



Aided Brand Awareness History

CT Historical Average: 59%



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?

Visitation in the Past 5 Years

Nearly 3 in 10 travelers indicated they visited Connecticut at some point in the past 5 years. This was a 6-point decline from 2019.

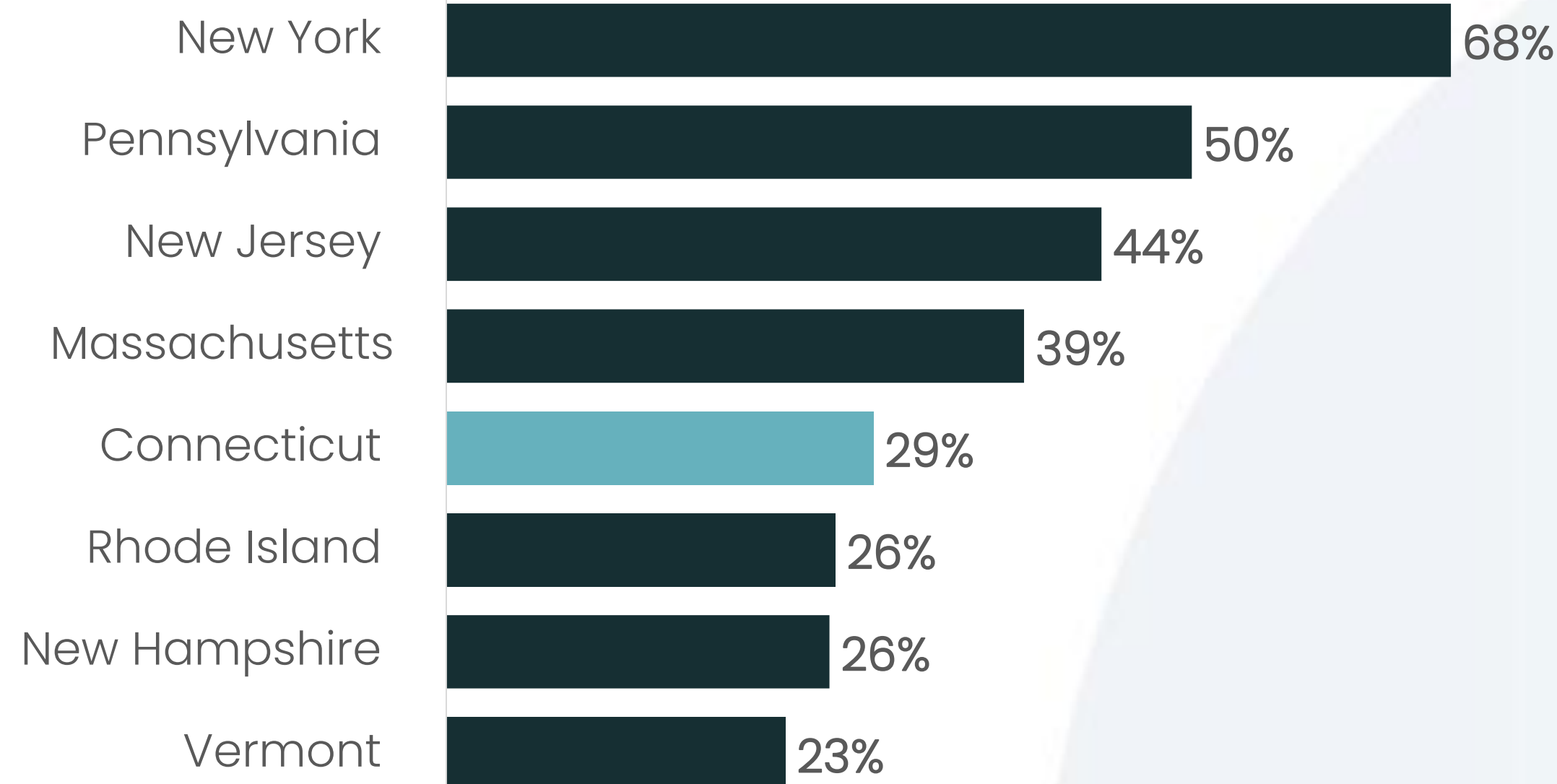
On average, competitive states saw a 3-point decline in visitation over the past 5 years as well.



Covid-19 Insight

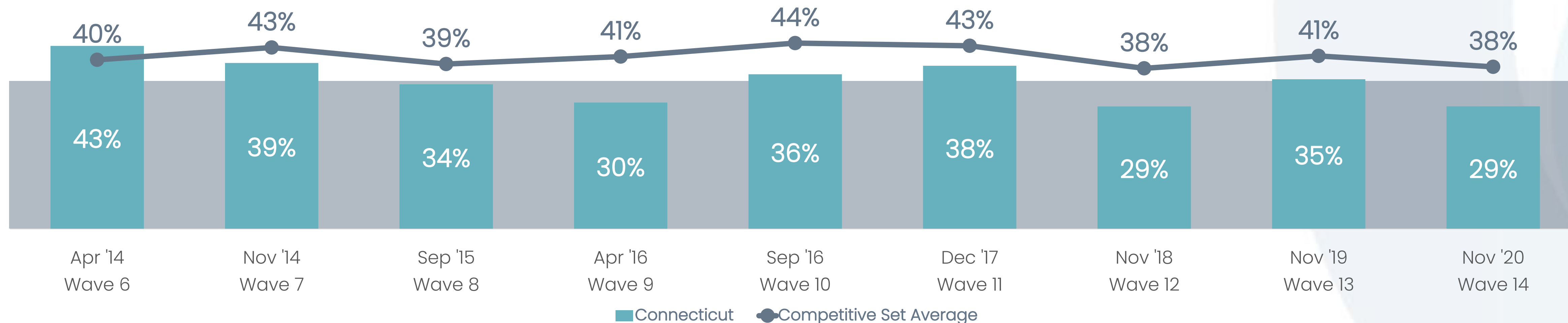
Less travel around the country meant fewer visitors for all destinations—including Connecticut

Visitation – Competitive States



Connecticut Visitation History

CT Historical Average: 35%



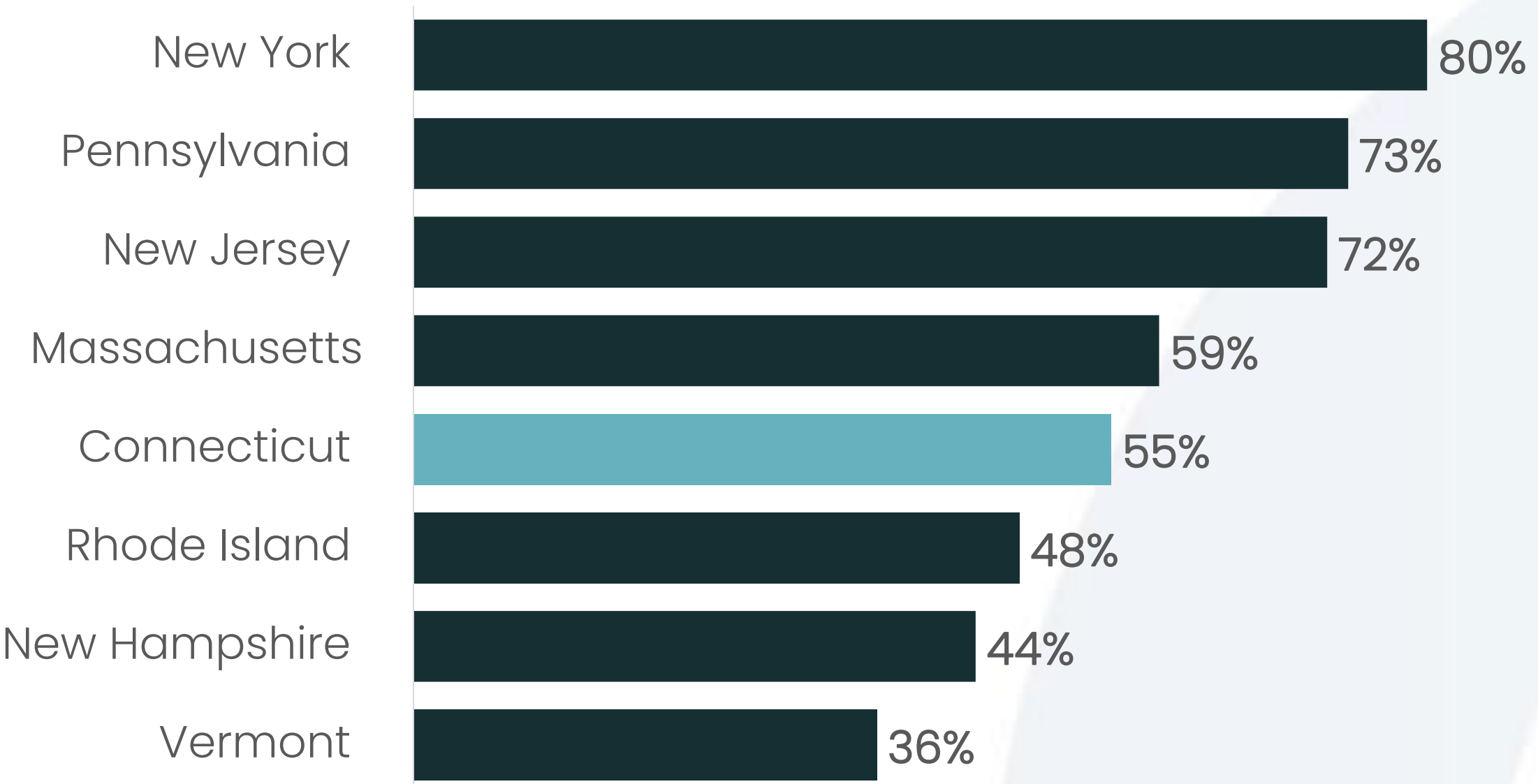
Q11: Using the scale provided, please indicate which of the following destinations you have visited for a getaway.

Conversion Rates

More than half of those who had either considered visiting Connecticut, or had visited at some point in the past, converted into visitation in the past 5 years.

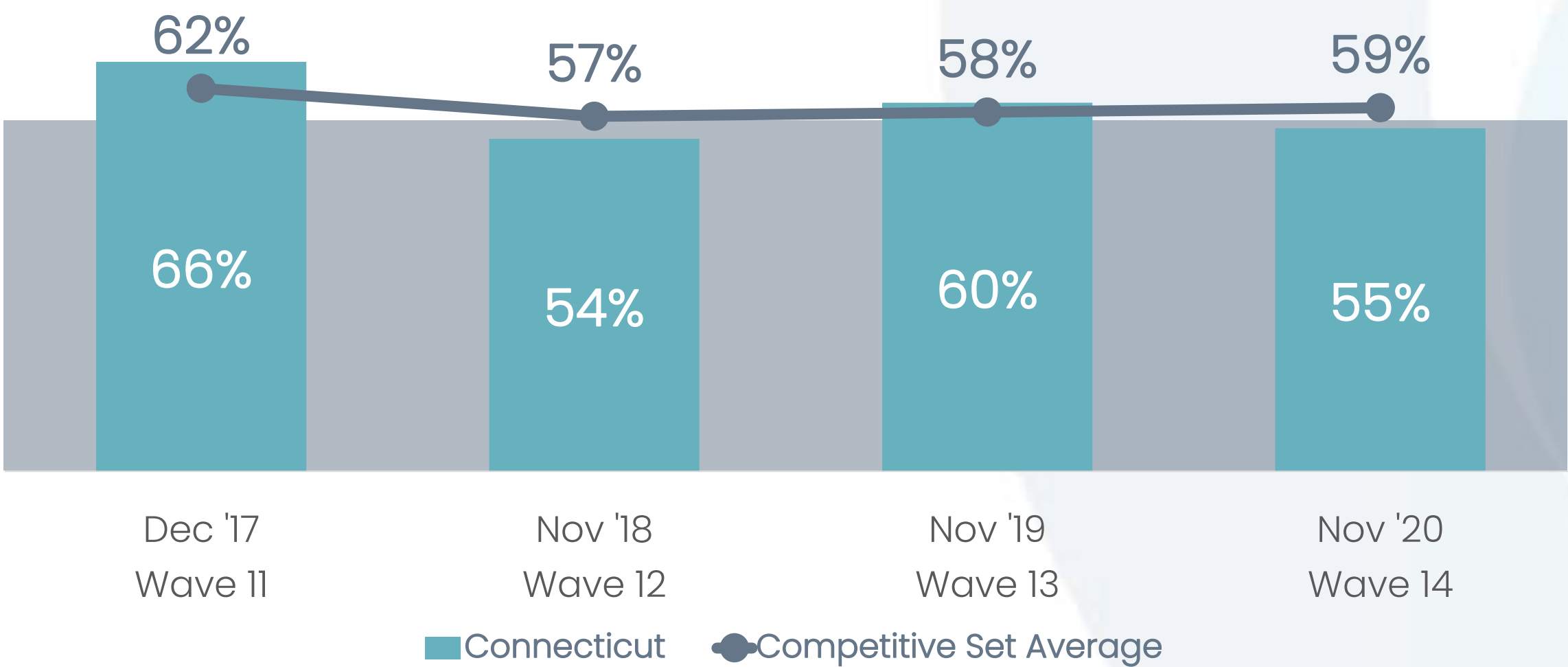
Conversion rates for Connecticut increased by 5 points compared to 2019, compared to a fairly even conversion rate average among competitive states.

Conversion Rates – Competitive States



Conversion Rates History

CT Historical Average: 59%



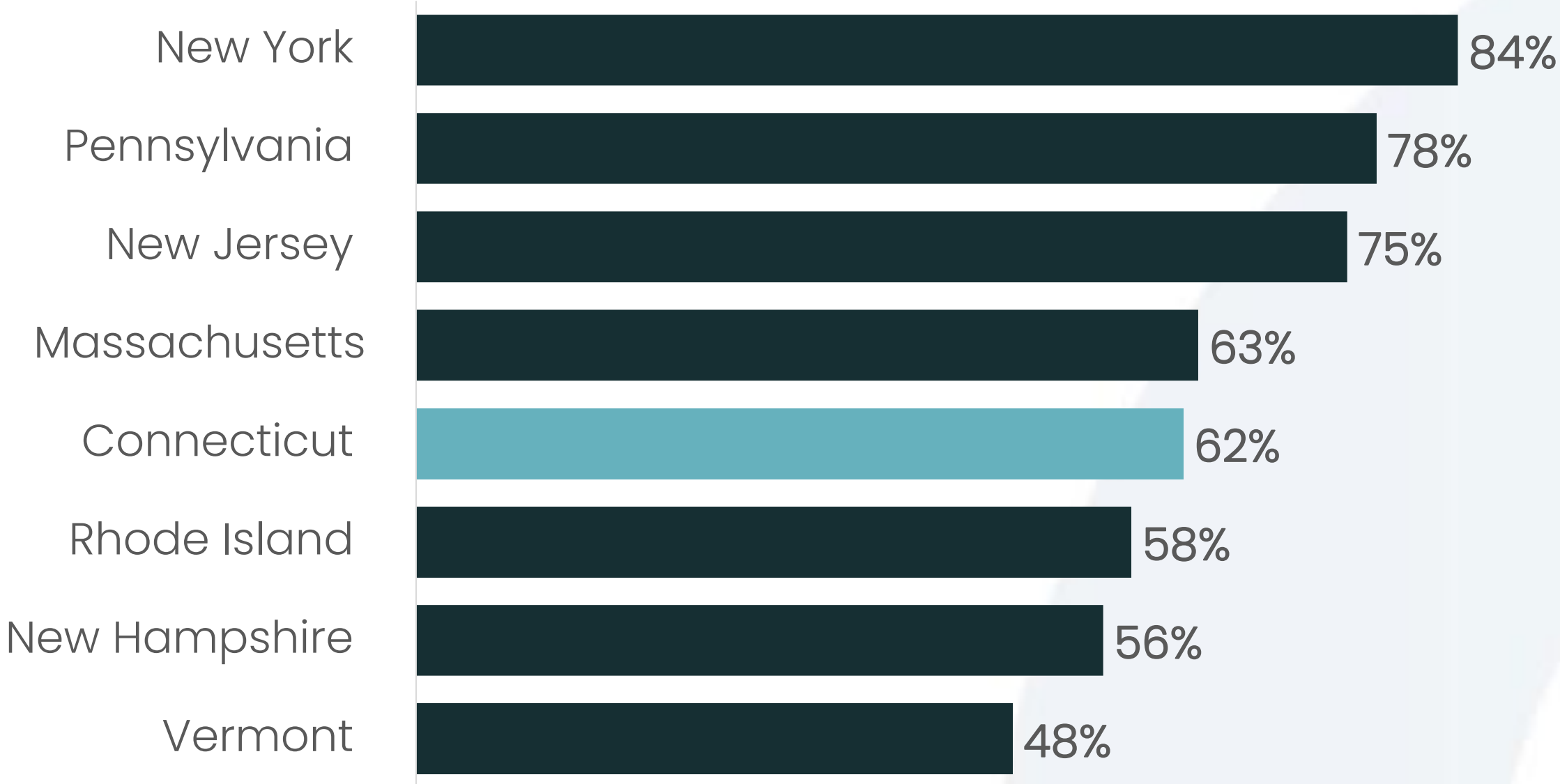
Q11: Using the scale provided, please indicate which of the following destinations you have visited for a getaway.

Retention Rates

More than 6 in 10 travelers who have ever visited Connecticut returned at some point in the past 5 years. Retention rates (unsurprisingly) dropped for Connecticut compared to last year.

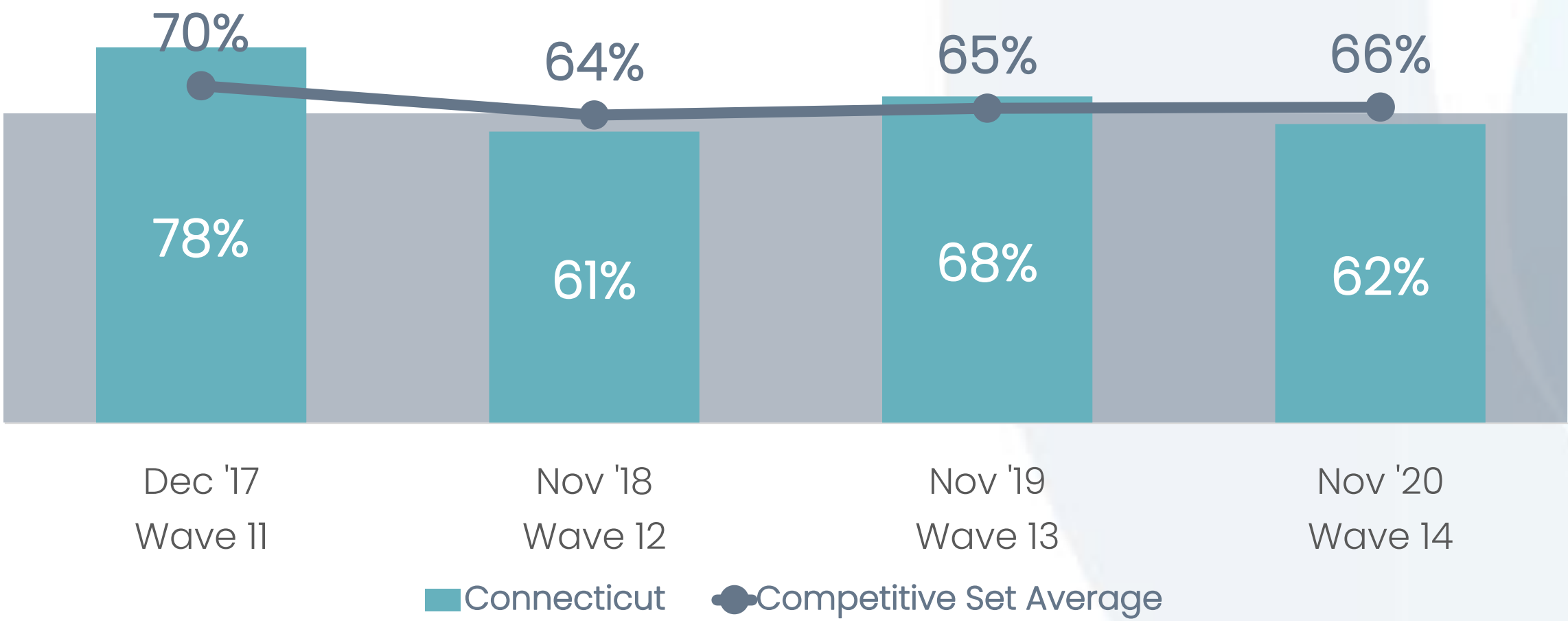
While Connecticut earned retention rates on par with Massachusetts and higher than Rhode Island, New Hampshire and Vermont, the drop this year was not in line with other states. In fact, on average, states saw a 1-point increase in retention compared to 2019.

Retention Rates – Competitive States



Retention Rates History

CT Historical Average: 67%



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

Interest in Visiting

Interest in visiting Connecticut increased to 50% this year—up a significant 13 points over 2019 levels.

The large increase in interest over the past was seen across all destinations with an average 9-point increase. However, this is likely due to pent-up demand for travel during the pandemic. Furthermore, the increase in interest for Connecticut just brought it on par with the historic average of 51%—driven by interest prior to 2015.



Covid-19 Insight

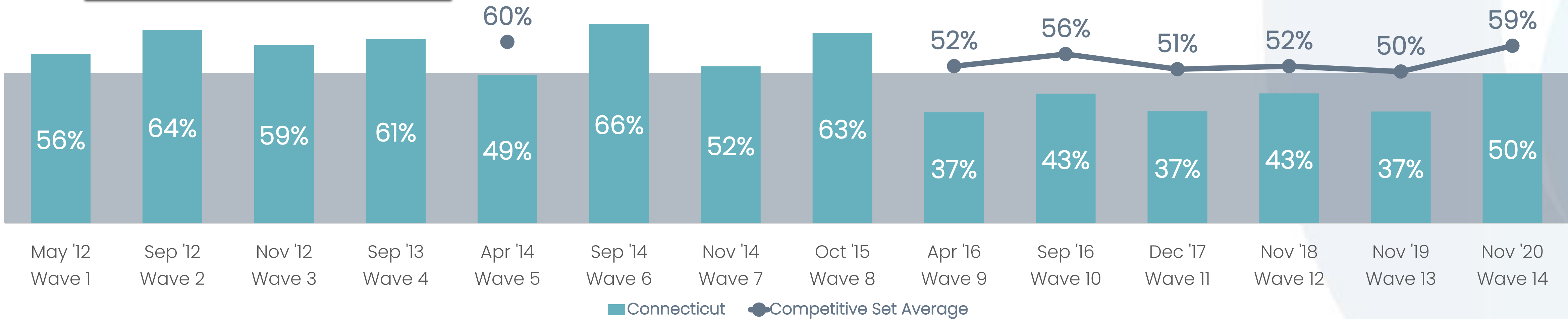
Being cooped up at home created pent-up interest and demand for travel to all places—especially for Connecticut

Interest in Visiting – Competitive States



Interest in Visiting History

CT Historical Average: 51%



Q13: 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."

Intent to Visit in 2021

While interest in visiting destinations in the next 2 years has shown an increase, there may still be some trepidation in the market. That is, the intent to visit Connecticut in the next 12 months dropped just slightly compared to last year.

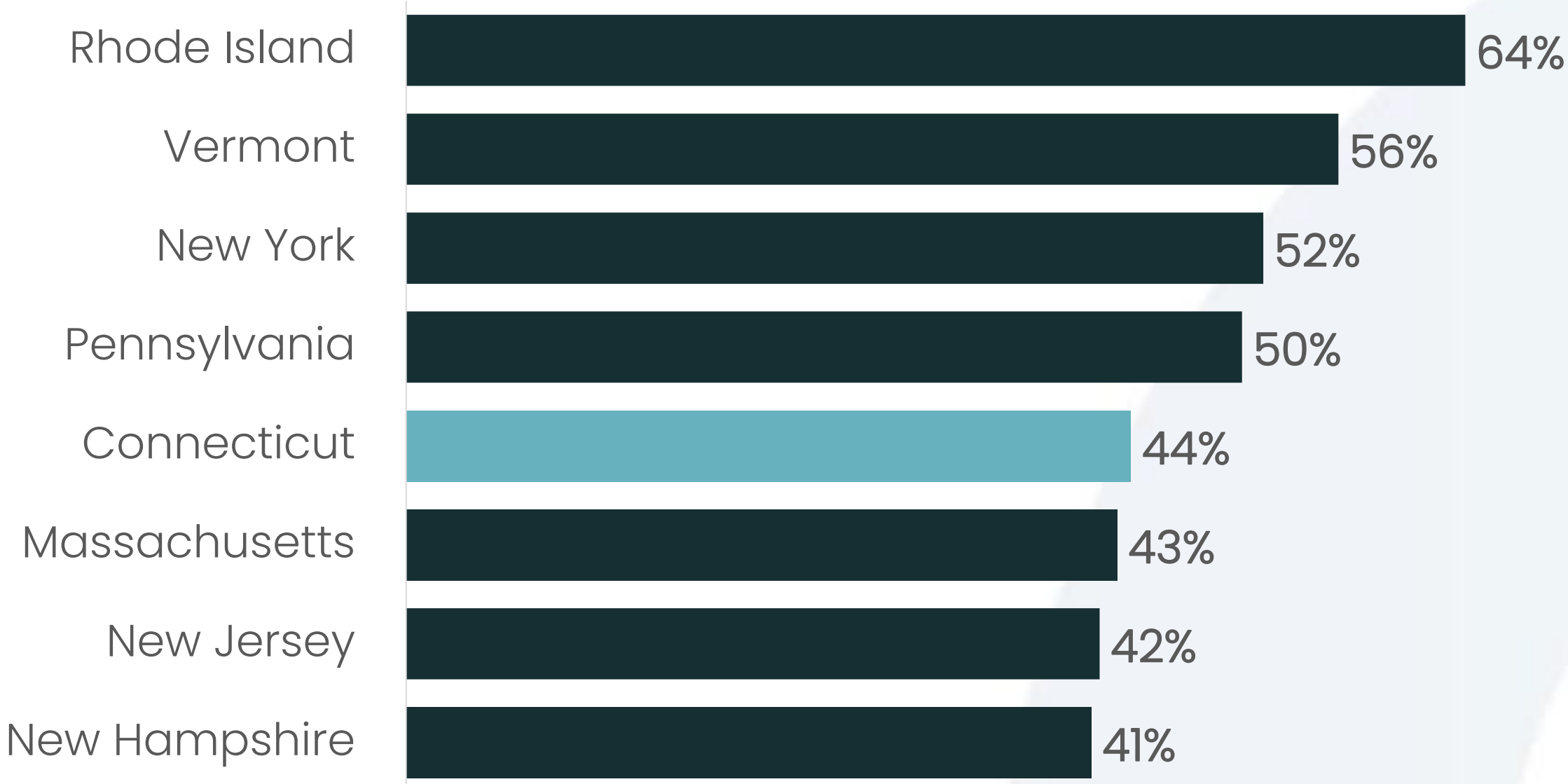
Similarly, intent to visit all states in the next 12 months saw an average 4-point decline compared to 2019.



Covid-19 Insight

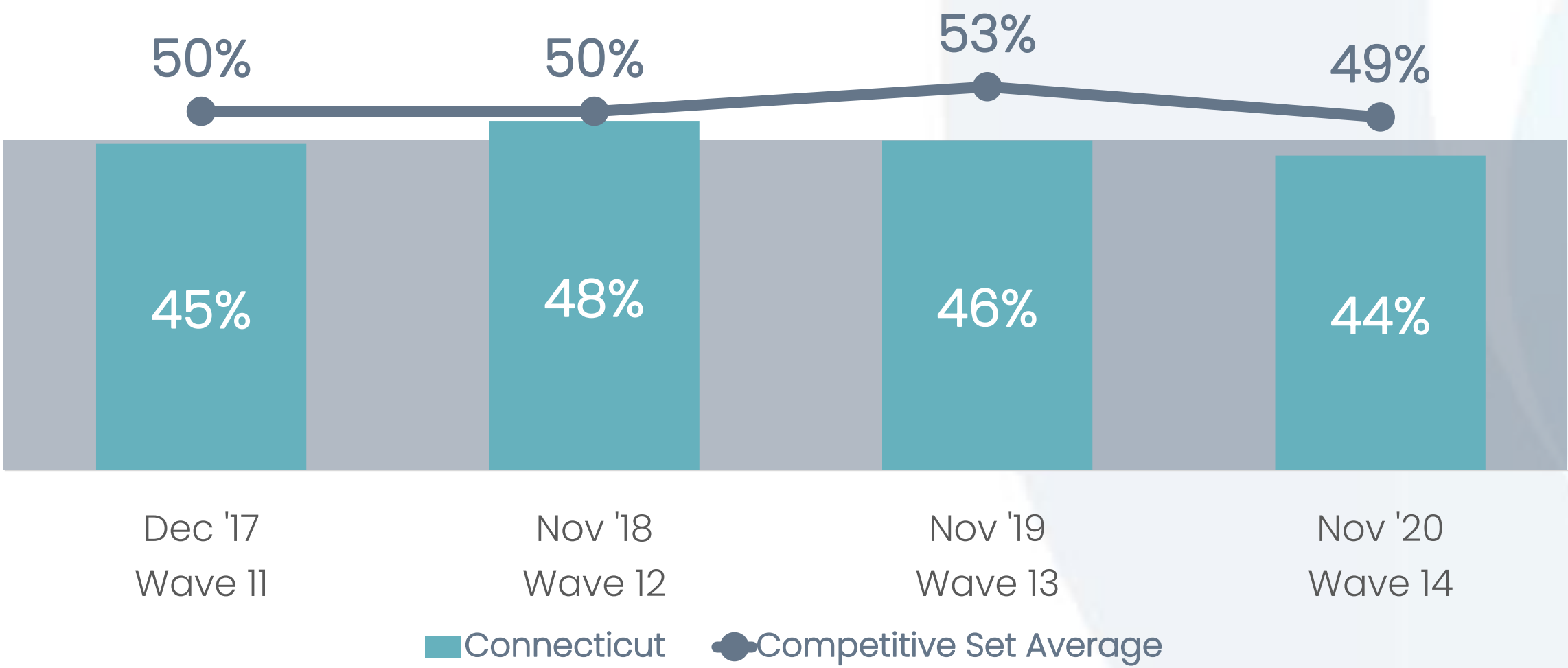
Covid-19 is still prevalent enough to keep most travelers at home—but pent-up demand will soon convert into travel.

Intent to Visit in 2021 – Competitive States



Intent to Visit in the Next 12 Months History

CT Historical Average: 46%



Q14: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months.

Connecticut 2020 Brand Awareness Research

Marketing Impact

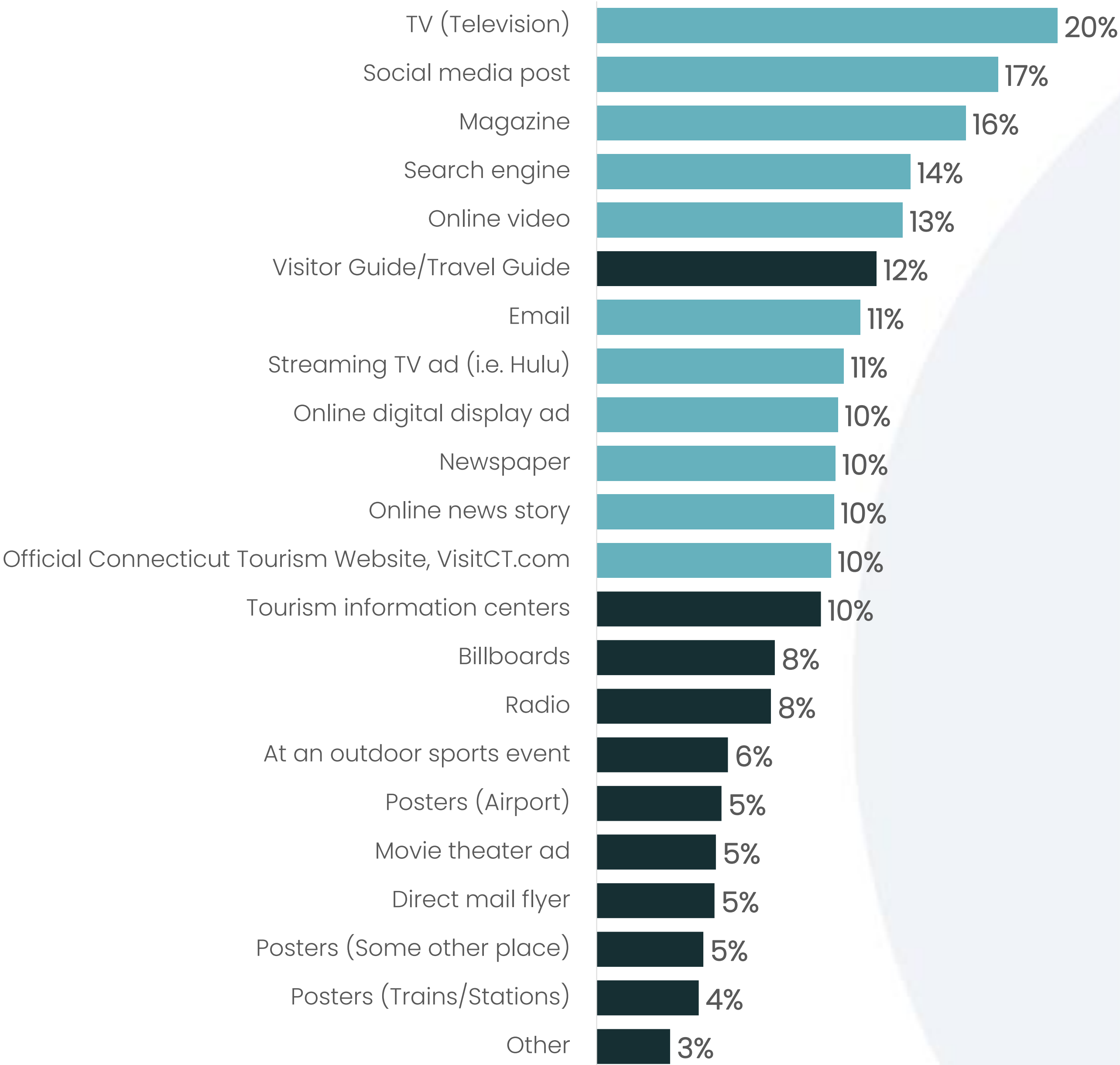


**SO GOOD
TO SEE YOU,
Connecticut**

Marketing Awareness

New England travelers are most likely to have recalled seeing something on television, social media or in a magazine that inspired them to want to visit Connecticut.

The Connecticut Office of Tourism has specifically targeted advertising on social media, online digital and streaming television.



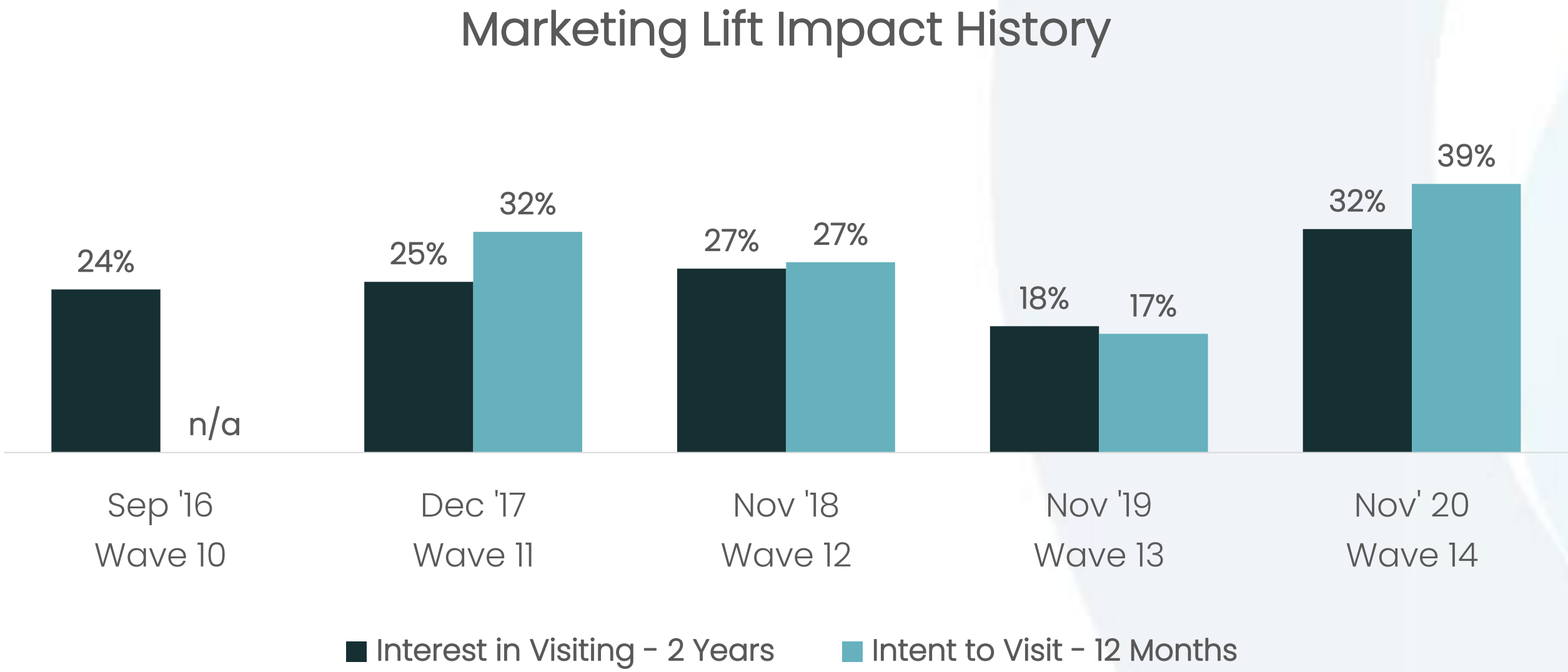
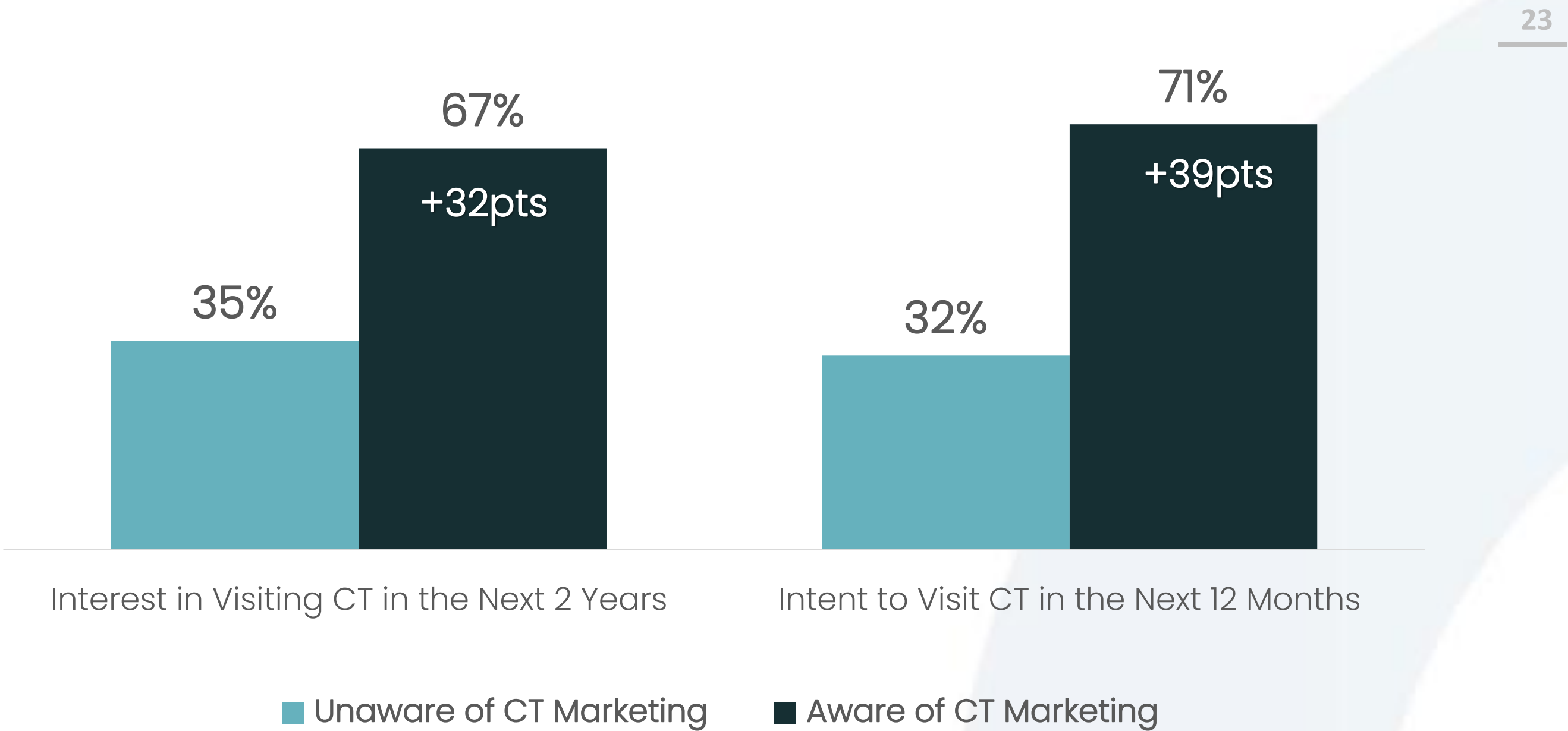
Interest & Intent

Aware vs. Unaware of CT Marketing

Connecticut’s marketing efforts not only have an impact on the perception of the state as a travel destination, but also on interest and intent to visit.

In 2020, travelers who had seen Connecticut advertising were 32 points more likely to be interested in visiting than those who hadn’t seen ads. Similarly, those who had seen advertising posted a 39-point higher intent to visit Connecticut in the next 12 months.

As shown in the second graphic to the right, marketing has long had a positive impact on both interest and intent to visit Connecticut. But 2020’s marketing was especially impactful.



Q13: 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." Q14: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months.

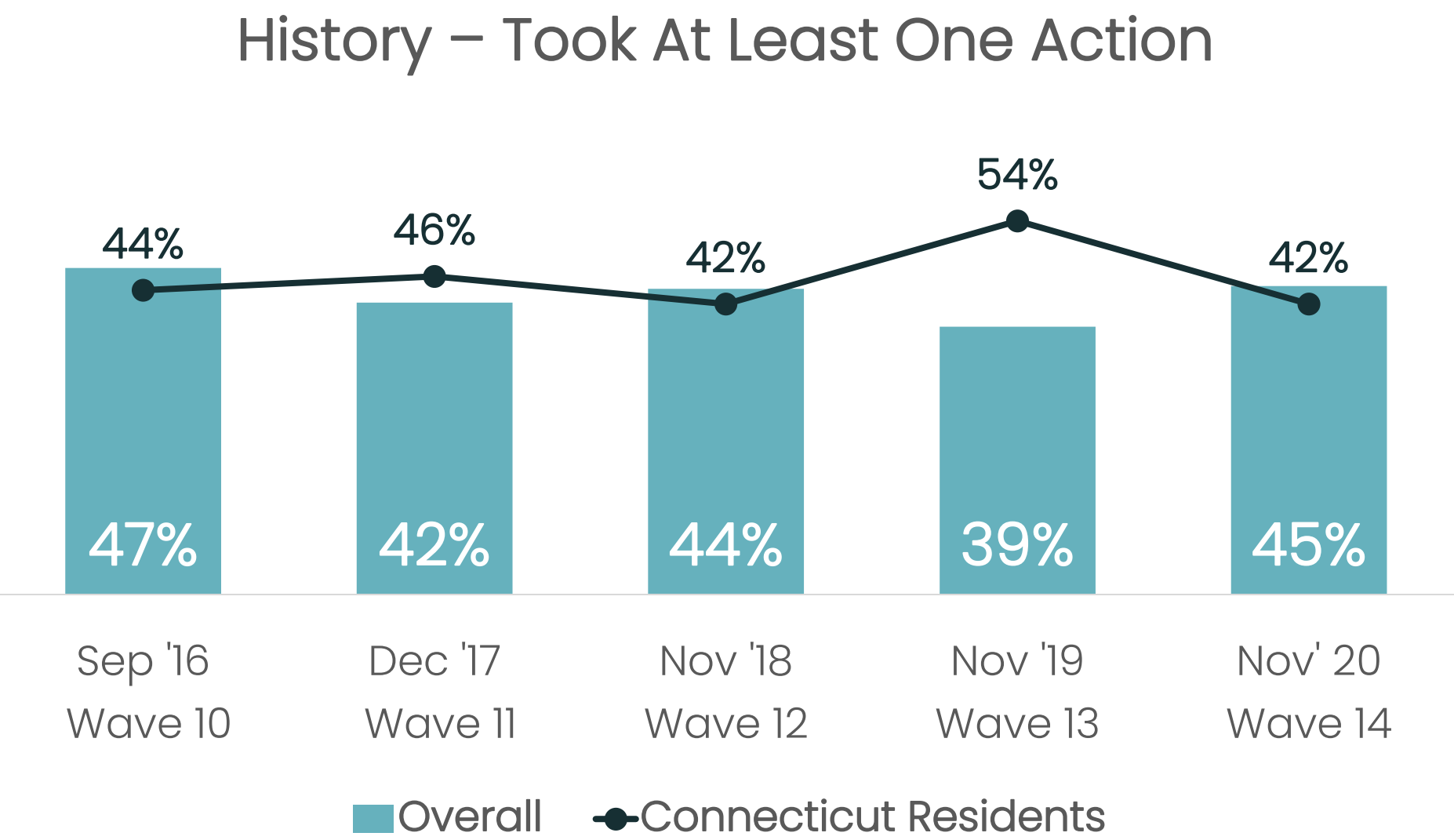
RESPONDENT BASE: ALL RESPONDENTS | N=1,000

Actions Likely to Take After Seeing Ads

Furthermore, 2020 ads were most likely to have an impact on travelers visiting the Connecticut website to find out more information.

When asked directly, many people are less likely to tell you they were impacted by an advertisement. This is why the key indicators of interest, intent, awareness and perceptions are important to measure among those both aware and unaware of advertising.

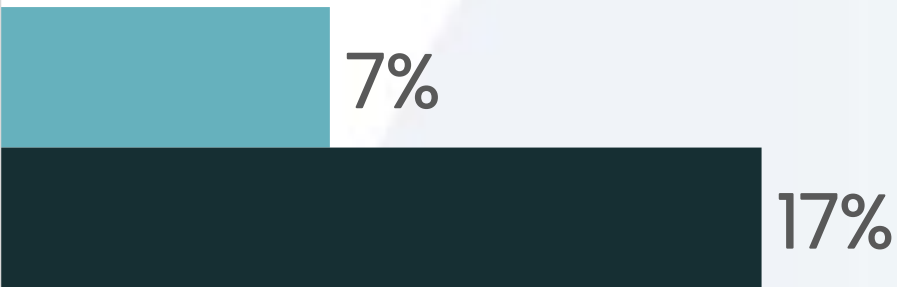
Interestingly, when asked directly in 2020, travelers were much more likely to say the ads impacted their decisions to seek out information on Connecticut and/or visit Connecticut than they were in 2019.



I looked into, or did some research, on visiting Connecticut after seeing or hearing an ad



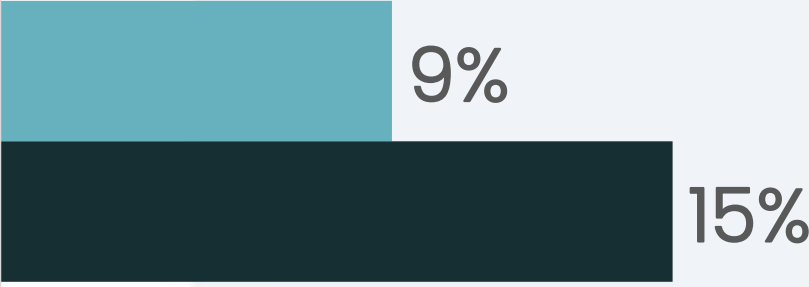
I specifically visited the Connecticut website (or ctvisit.com) after seeing or hearing an ad to find out more about the state



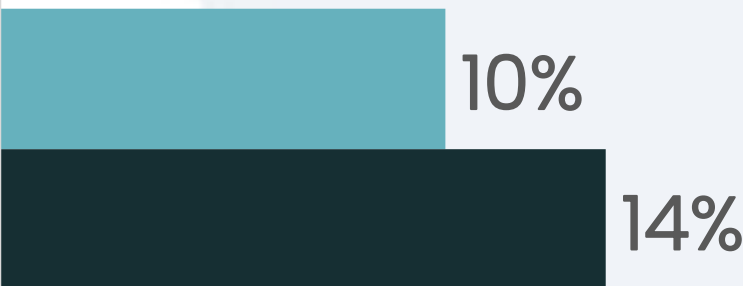
I am planning to visit Connecticut in the next year as a result of seeing or hearing an ad



I personally visited Connecticut as a result of seeing or hearing an ad



I called at least one location or attraction in Connecticut, or visited their website, after seeing or hearing an ad



2019 2020

Q27: 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 2020? Please select all that apply.

Marketing Communications

Travelers who saw advertising were also significantly more likely to agree that Connecticut is a great place for a short getaway, a place worth visiting in the future and a great place to spend time together.

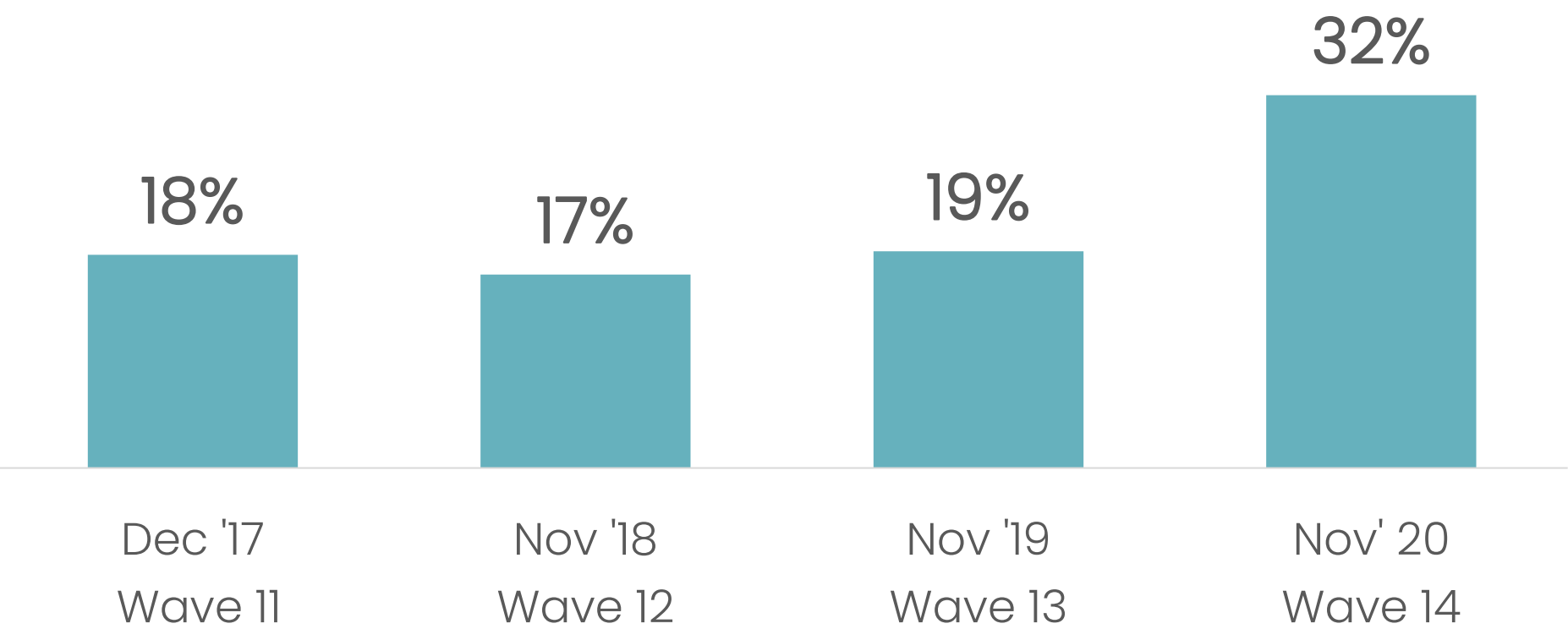
In fact, all advertising takeaways about the state of Connecticut score stronger among those who had previously seen advertising for the state. In 2020, the average lift was 32 points. This is significantly higher than the impact of advertising we've seen in the past.



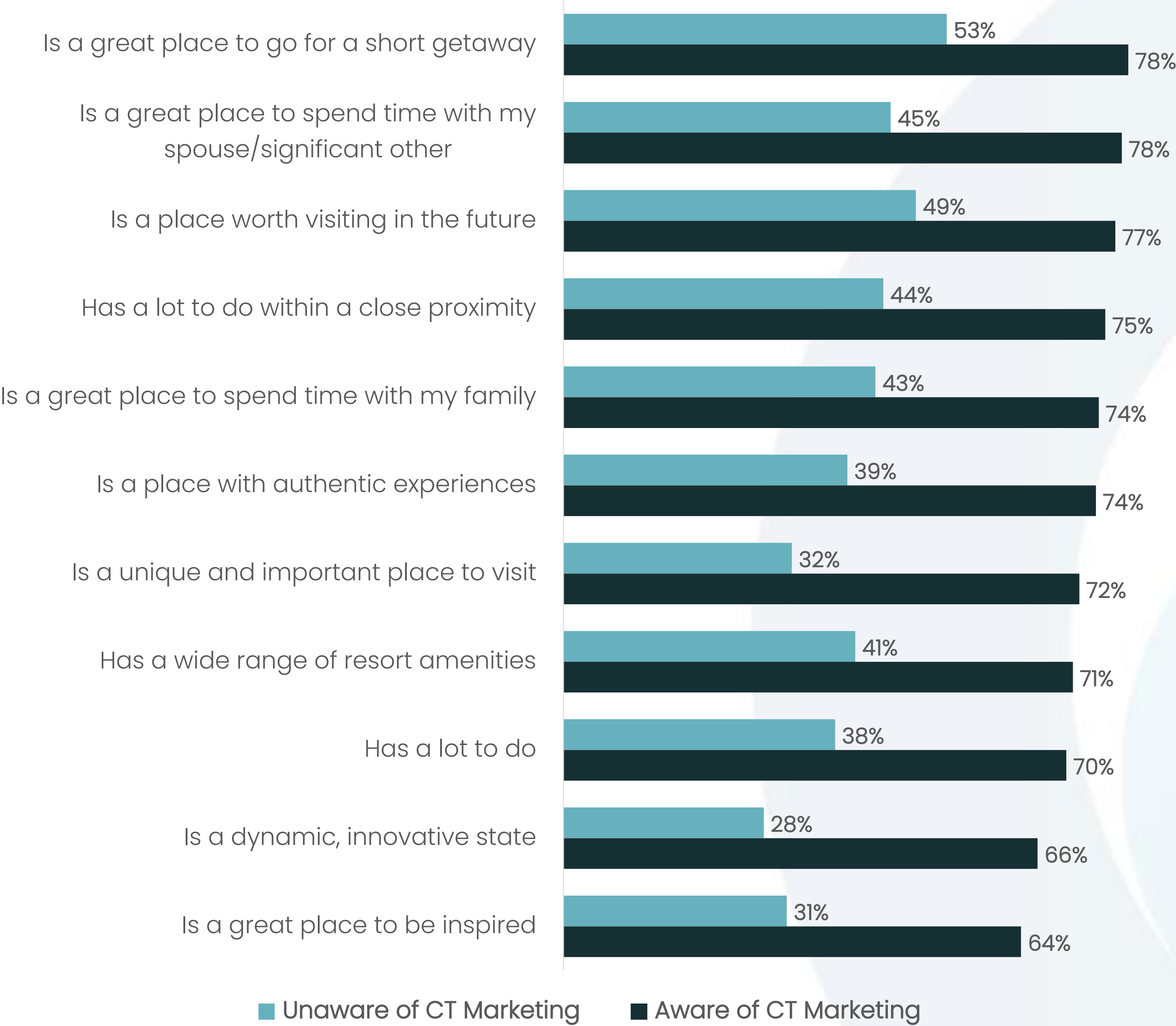
Covid-19 Insight

Similar to increased interest, cooped up travelers are highly influenced by marketing in 2020.

Average Ad Communications Lift History



% Agree/Strongly Agree with Statements After Seeing Mktg



Q26: Did the marketing communications, online news stories or social media posts you saw or read make you think that Connecticut...?

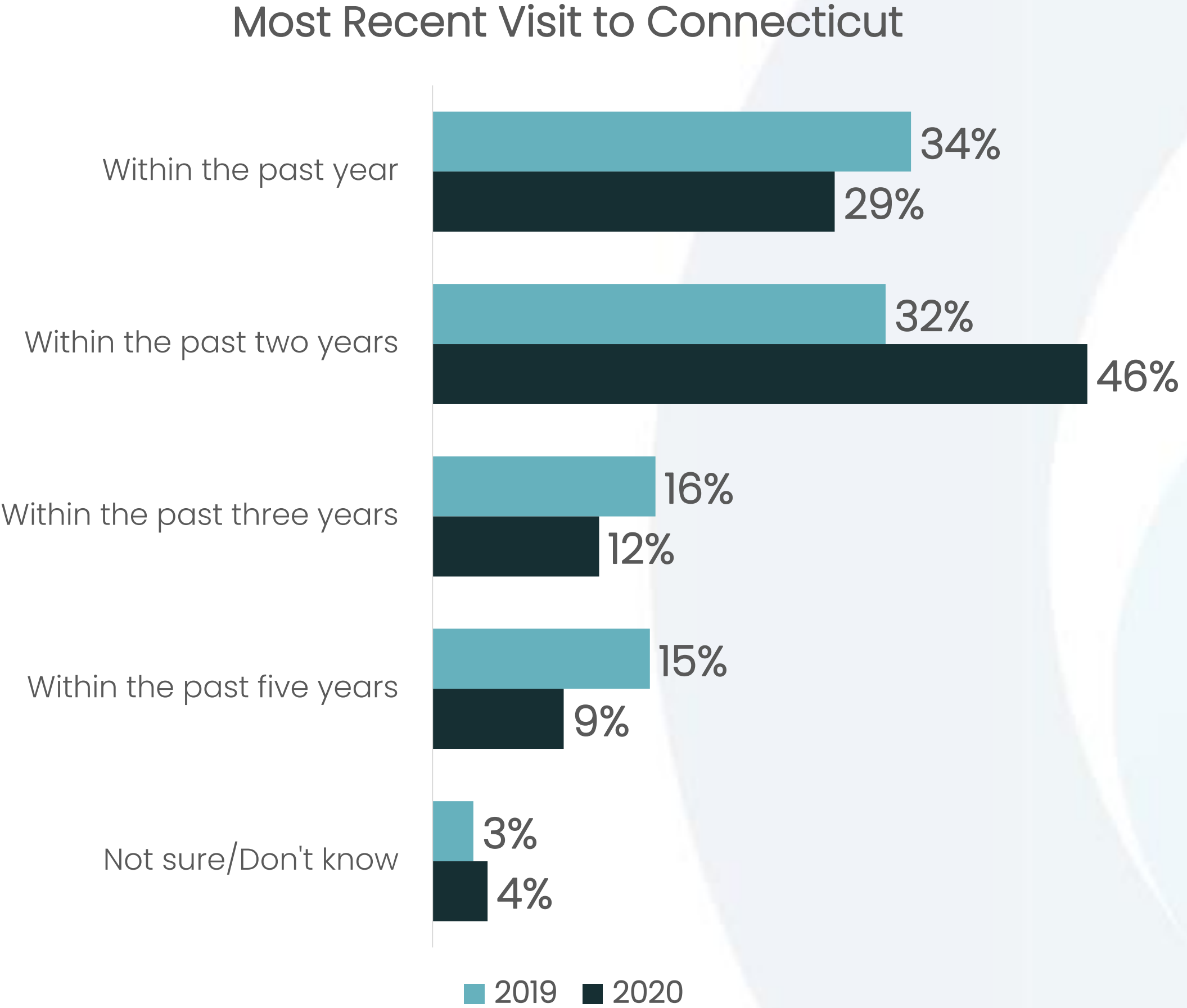
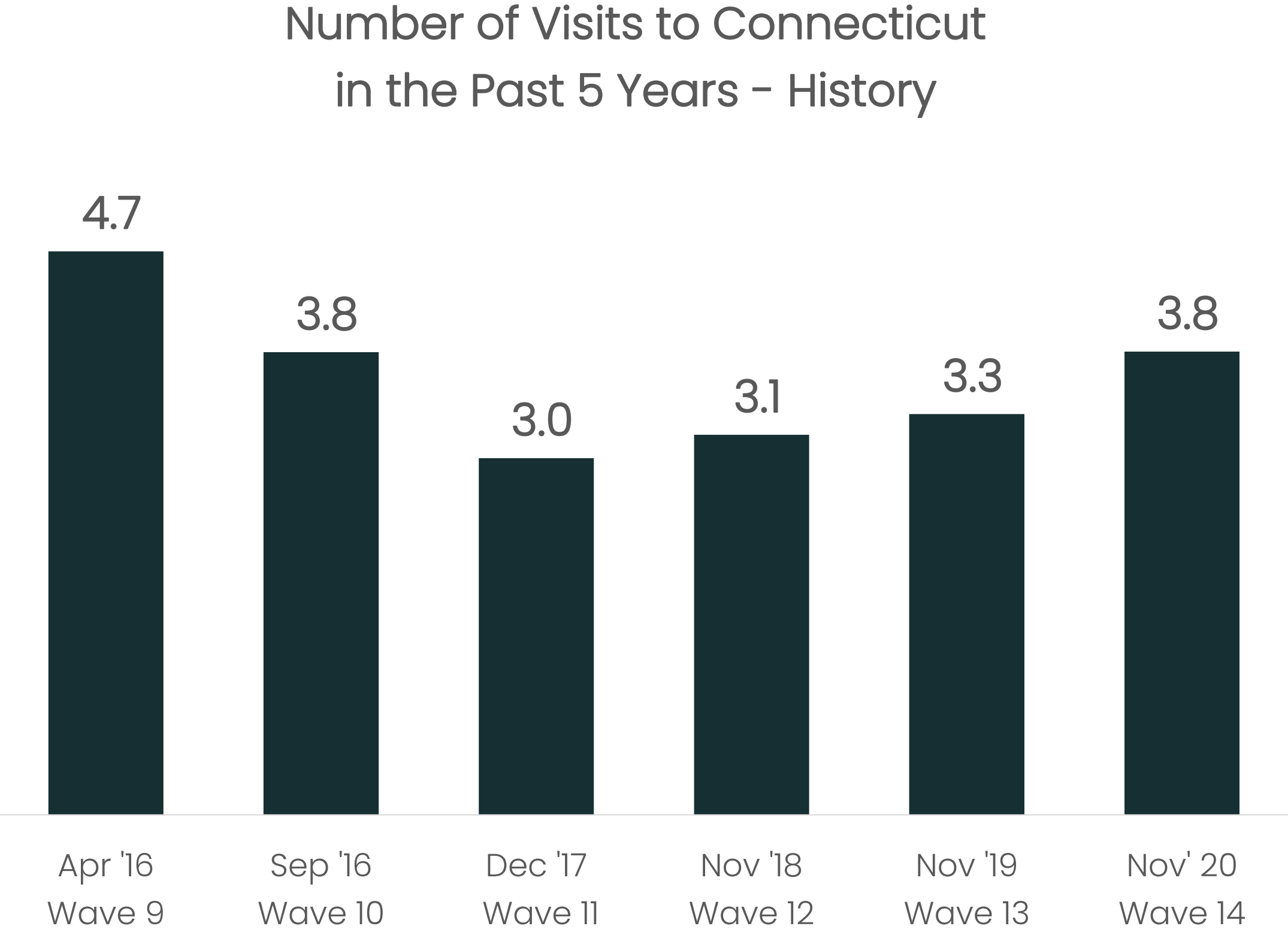
RESPONDENT BASE: ALL RESPONDENTS | N=1,000

Connecticut 2020 Brand Awareness Research

Connecticut Visitor Behavior

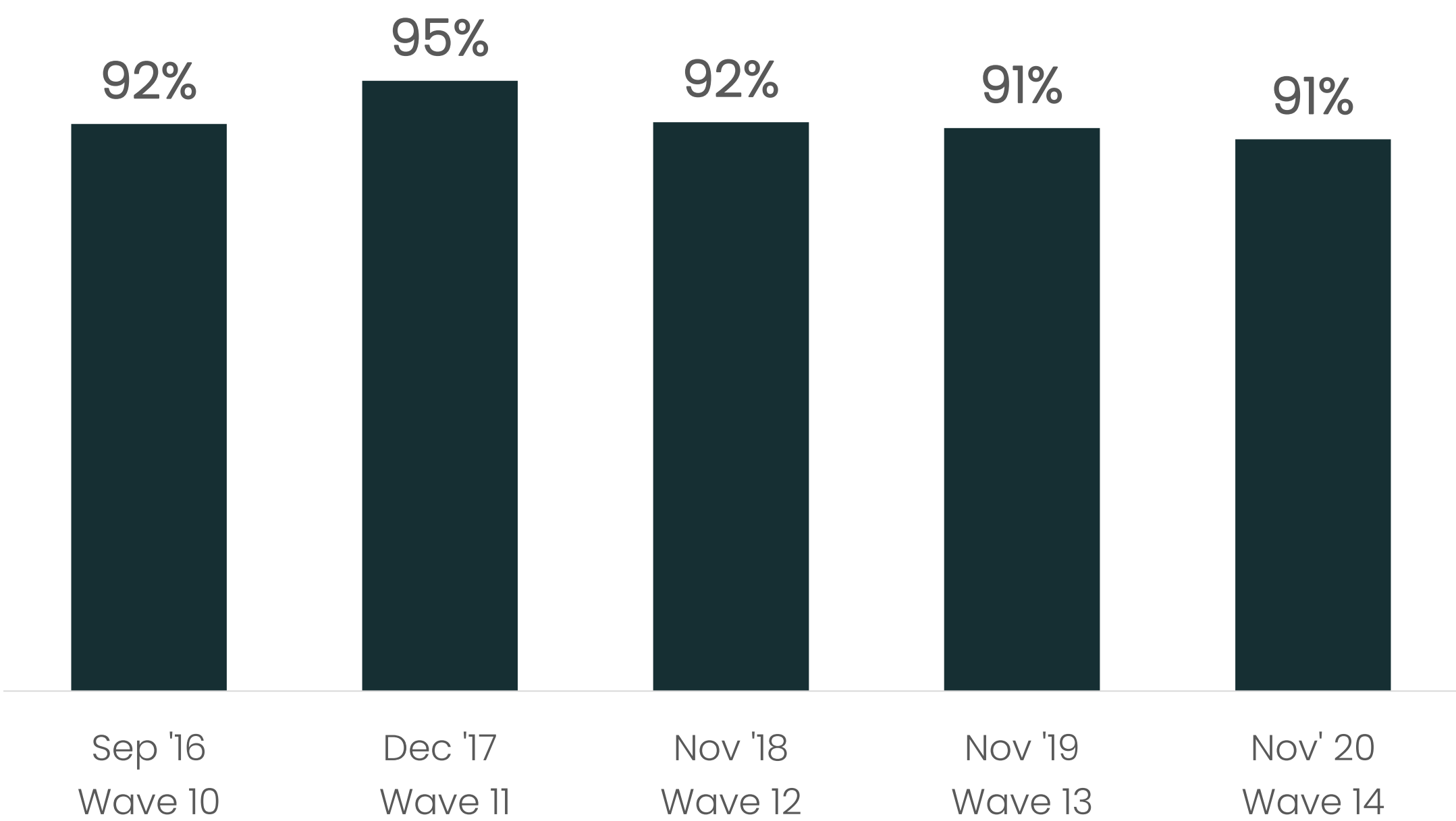


Over the past several years, visitors to Connecticut have continued to increase their number of trips each year. And while current year visits dropped a bit in 2020, we see that prior to the pandemic, visitation increased significantly.

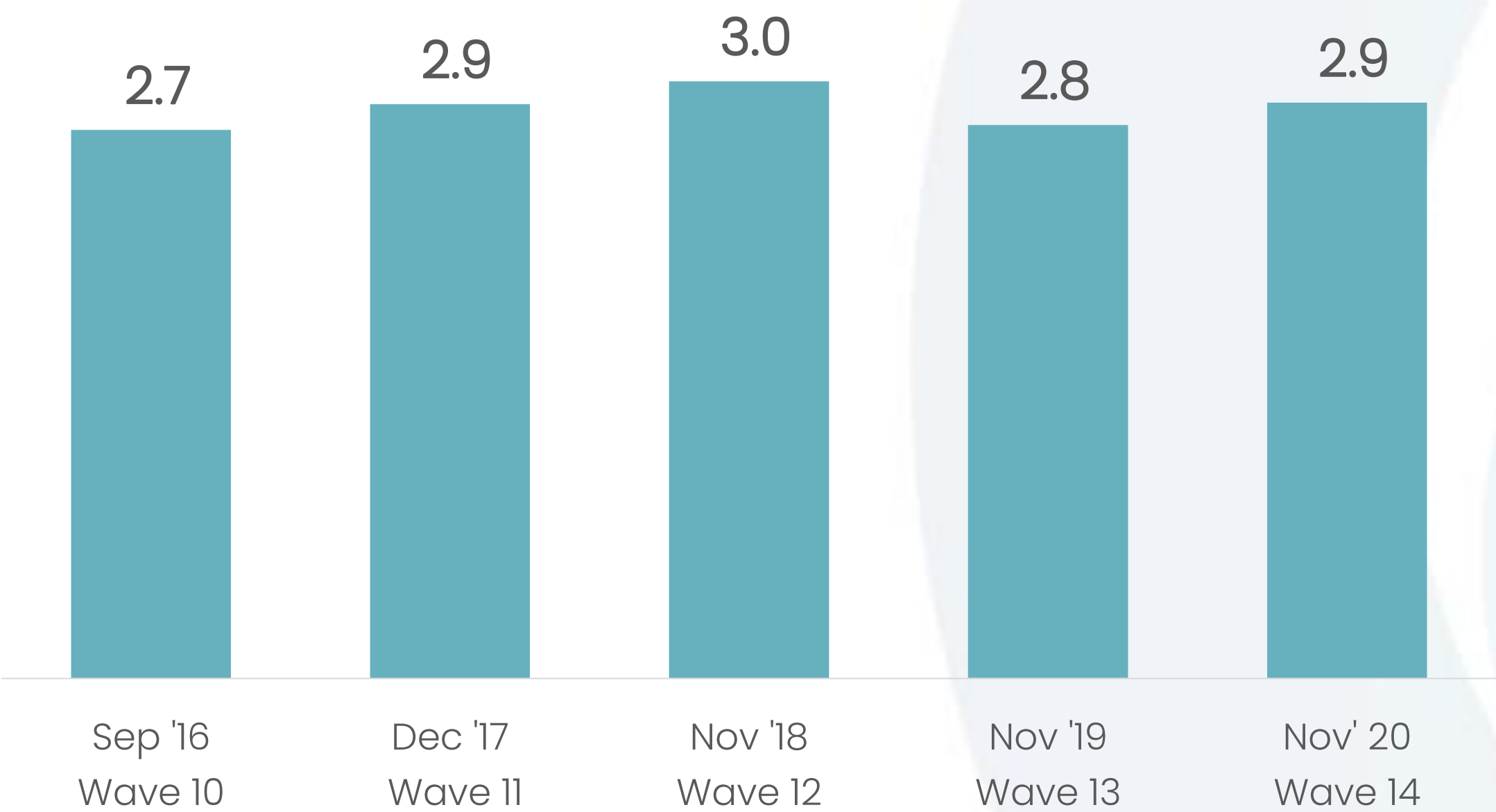


Similar to years past, the vast majority of Connecticut travelers stayed overnight on their last trip – with most staying nearly three nights.

Overnight Visitation to Connecticut – History



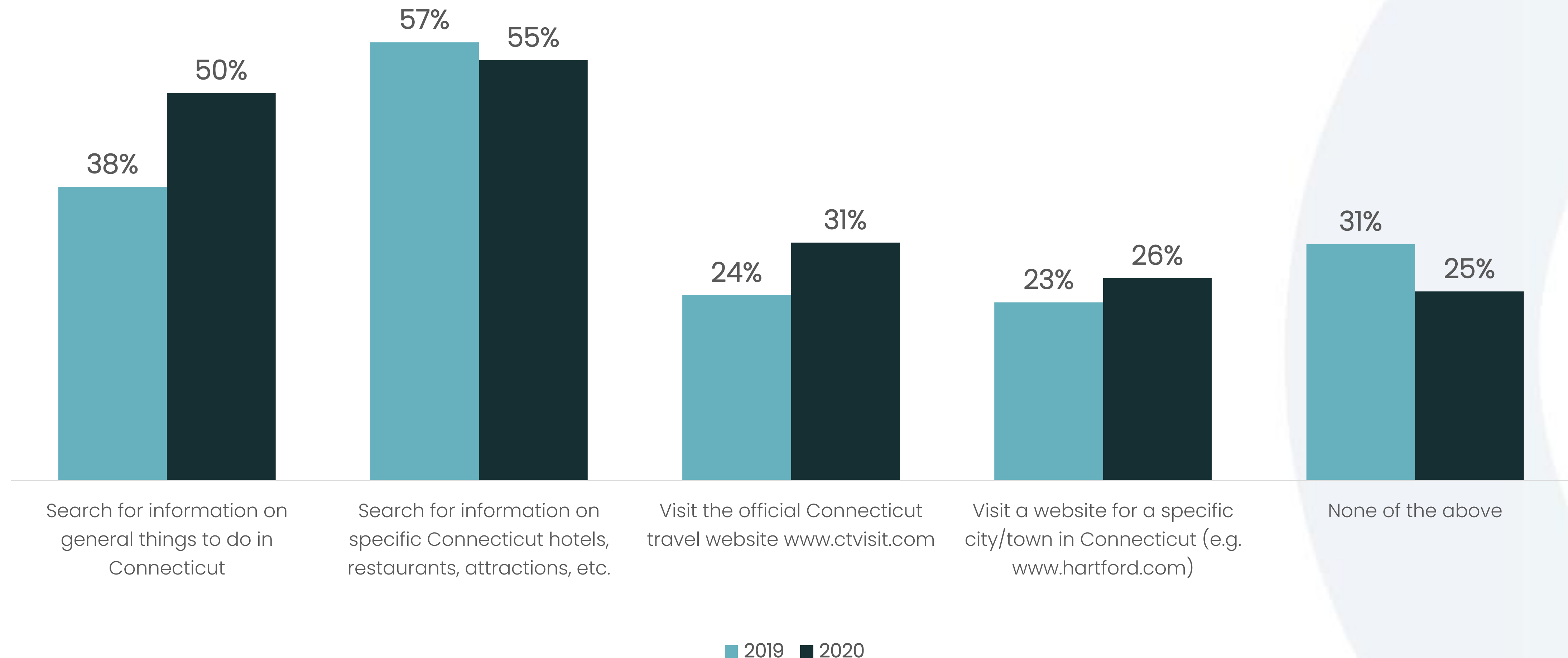
Length of Stay – History



Q21: How many nights did you spend in the area on your most recent trip?

RESPONDENT BASE: VISITED CONNECTICUT IN THE PAST 2 YEARS | N=301

Prior to visiting the state, visitors were most likely to search for information on Connecticut. In 2020, visitors were much more likely to do this research than they were in 2019.



Q20: Which of the following actions, if any, did you take within 30 days prior to traveling to Connecticut on your most recent visit? Please select all that apply.

RESPONDENT BASE: VISITED CONNECTICUT IN THE PAST 5 YEARS | N=388

Visitor & Target Market Demographics

Visitors in 2020 earned a higher household income, were younger, and visited more often than 2019 visitors to Connecticut.

Those who visited in 2020 were closer in income and age to the overall target market than 2019 visitors were but were a bit less ethnically diverse.

Nationwide, those who have traveled since the pandemic began tend to come from higher-income households who were not as affected by the pandemic, so the increase in household income and change in demographics are not surprising.

**Covid-19 Insight**

Those less impacted by Covid are the ones traveling in 2020; i.e., higher income, younger travelers without children.

Category	2020 Visitors*	2019 Visitors*	Target Market Travelers*
Household Income	\$137.4k	\$128.9	\$137.0k
Age of Respondent	47.7	52.5	46.7
25-34	15%	13%	18%
35-44	50%	42%	48%
55-64	36%	45%	35%
Interest in Visiting Next 2 Years	72%	61%	50%
Intent to Visit Next 12 Months	87%	93%	44%
Number of Visits Past 5 Years	6.8	5.7	3.8
White, Non-Hispanic	87%	85%	82%
Black, Non-Hispanic	3.4%	1.7%	4.5%
Hispanic	4.1%	4.5%	4.1%
Asian	4.7%	4.5%	6.6%
Other	4.1%	6.6%	5.1%

*All metrics from 2020 and 2019 come from Target Market Travelers and Visitors. Target Market Traveler/Visitors live in New England, are 25-65 years old and earn a household income of \$75,000 or more.



THANK YOU

GET IN TOUCH WITH US

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