



Connecticut[®]

2021 Brand Awareness Research

Report Delivered February 2022



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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 2021 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 +/-3.1% at a 95% confidence interval.

Connecticut 2021 Brand Awareness Research

Key Takeaways

Brand Perception Continues to Improve

- Once again, Connecticut has earned high ratings among the brand characteristics, descriptors and business characteristics evaluated. Those who saw marketing from Connecticut had a significantly higher perception of the state than those who didn't. And the lift in 2021 remained much higher across all brand measurements than Connecticut has typically seen in the past.
- Connecticut is most known for beautiful fall foliage (70%), interesting small towns to explore (66%) and beautiful scenery (66%). Likewise, the words that travelers believe best describe the state include historical (67%), traditional (65%) and upscale (64%).
- The perception of Connecticut as a good place to do business also improved, with "a place with a good quality of life" once again ranking at the top.



Brand Health Varies by Metric

- The Covid-19 pandemic continues to impact destinations across the country, and Connecticut is no exception. The average aided brand awareness for competitive states took another significant decline compared to 2020. Connecticut also took a hit, dropping 13 points compared to last year. The ratio of visitation in the last five years fell 16 points, while the competitive set average fell eight points.
- And given the decline of travel across the board, conversion rates also declined across all competitive states, including Connecticut. The conversion rate for Connecticut fell 20 points this year while the average competitor in the Northeast saw their conversion rate drop by eight points. Retention rates dropped in both Connecticut (17 points) and the competitive set (6 points). However, it's important to remember that Connecticut's primary target market skews high-end, and this segment has been driving new visits at destinations across the country
- However, both interest in visiting and intent to visit in 2022 increased for Connecticut, along with the competitive set destinations. This is likely due to pent-up demand for travel that has accumulated over the past 2 years.



Connecticut's Marketing is Doing Its Job

- Connecticut's marketing efforts have not only impacted traveler perceptions of the state as a travel destination but have also increased both interest and intent to visit.
- Marketing has long had a positive impact on both interest and intent to visit Connecticut, and this year was no exception. In 2021, travelers who had seen Connecticut advertising were 29 points more likely to be interested in visiting than those who hadn't seen ads. Similarly, those who had seen advertising were 30-points more likely to visit Connecticut in the next 12 months.
- More importantly, 2021 ads were even more likely to have impacted travelers' desire to plan a trip to Connecticut, do research on visiting Connecticut and visit the state's website among other planning actions. Every advertising takeaway about the state of Connecticut scored higher among those who had previously seen advertising for the state. In 2021, the average lift was 37 points.



A scenic view of a suspension bridge over a river, surrounded by dense forest with vibrant autumn foliage in shades of yellow, orange, and green. The bridge has a metal railing and is supported by cables. Two people are walking on the bridge. The image is split into two halves by a diagonal line; the left half is dark and semi-transparent, while the right half shows the full, bright scene.

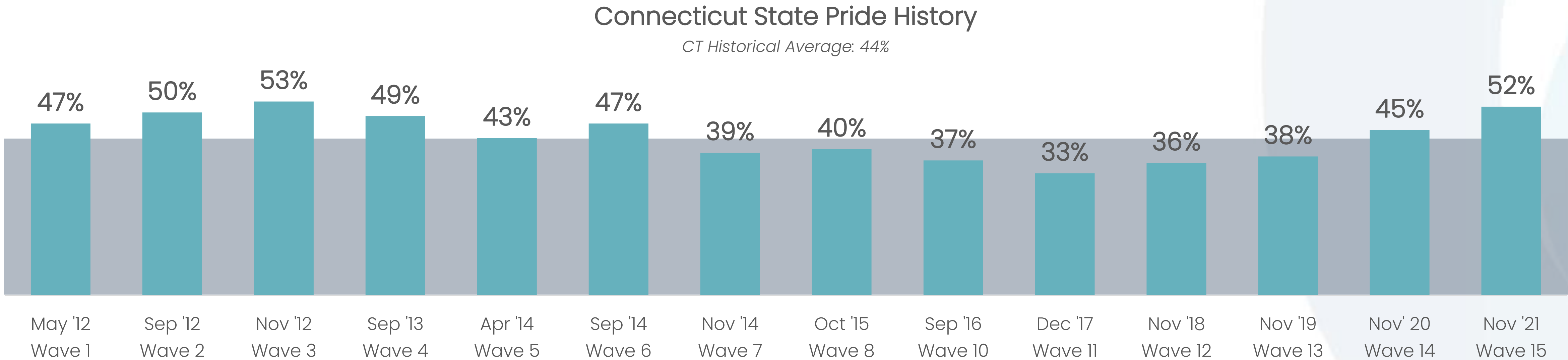
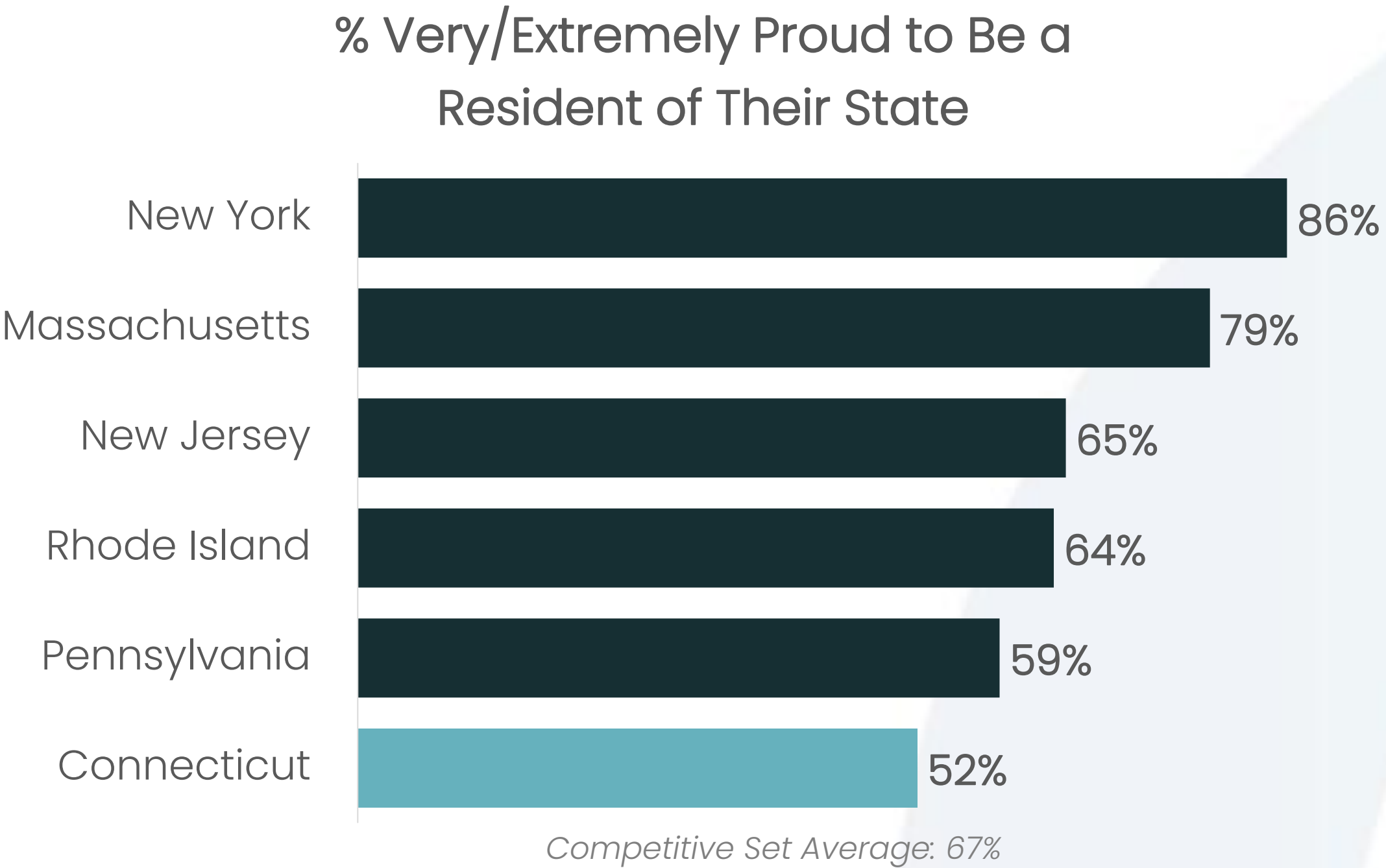
Connecticut 2021 Brand Awareness Research

Brand Perception

Resident State Pride

Connecticut residents continue to become increasingly proud of their home state. In 2021, pride rose by another 7 points and is now the second highest score generated in the past 15 waves of research.

However, resident pride for Connecticut continues to trail all other states surveyed in 2021. Connecticut trails the competitive set average by 15 percentage points.




Connecticut Brand Ratings

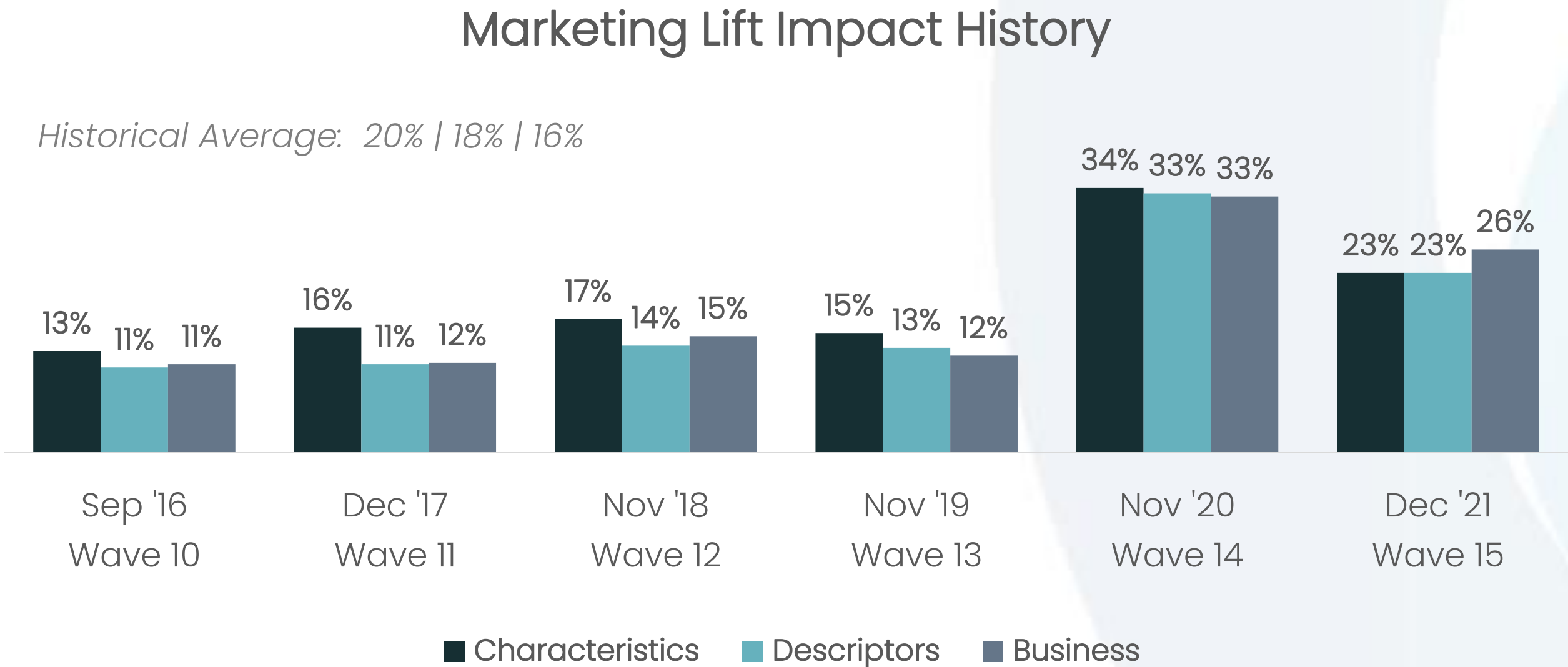
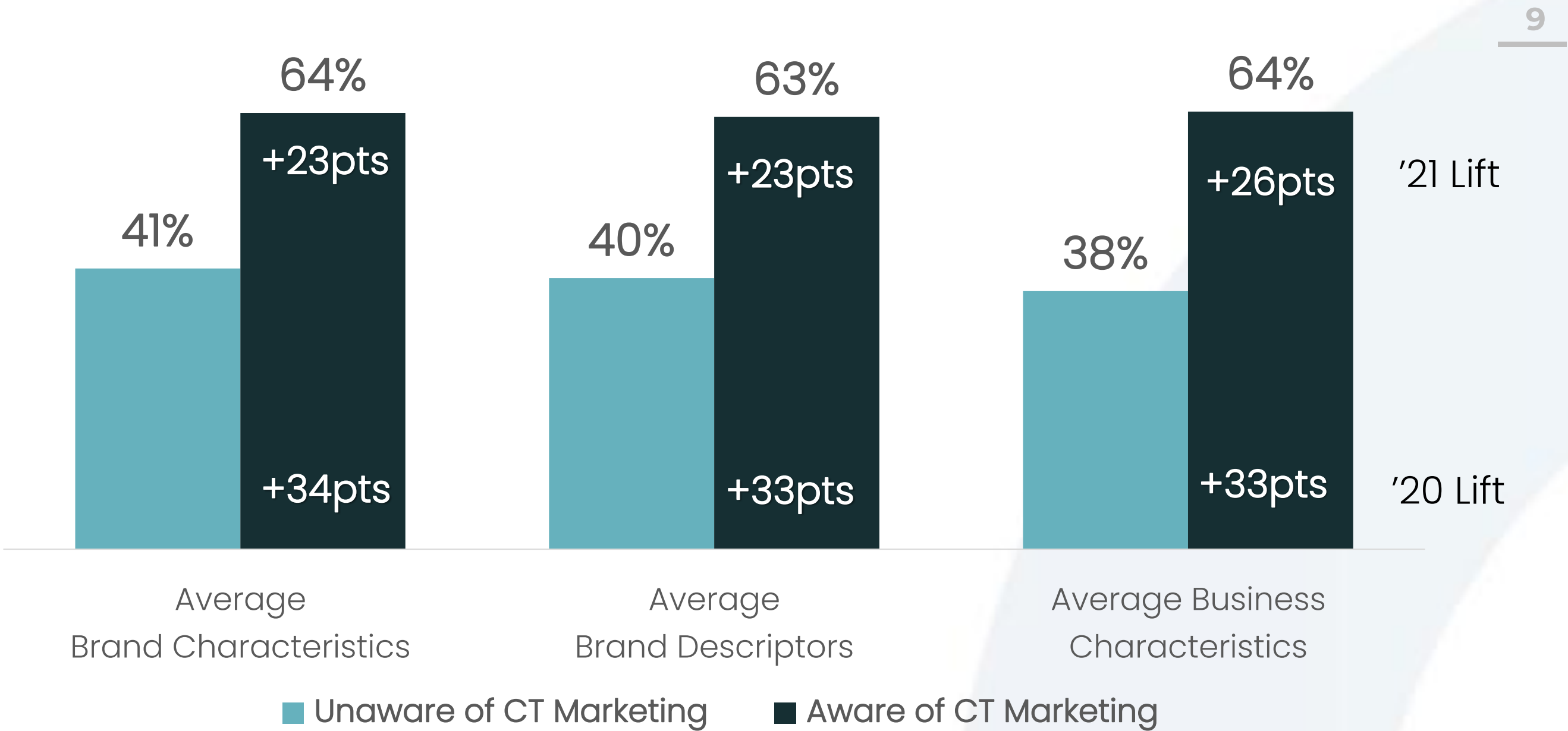
Connecticut continues to earn high ratings among the brand characteristics, descriptors and business characteristics evaluated. Likewise, the state’s marketing efforts continue to have a positive impact on Connecticut’s brand perceptions.

Over the years, Connecticut’s marketing efforts have created a lift in the perceptions of travelers. Even in 2021, as travelers began venturing out farther, those who saw marketing from Connecticut had a significantly higher perception of the state than those who didn’t see marketing. The lift in 2021 remained much higher across all brand measurements than Connecticut has typically seen in the past.

The historical average for marketing lift for Brand Characteristics is 20%, Brand Descriptors is 18% and Business Characteristics is 18%.

**Travel Insight**

2020 was an anomaly for many destinations. Many reduced or eliminated marketing but still yielded remarkable results.



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. 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. 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)

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

Describes CT well/extremely well	2021	2020		2021	2020
Has beautiful fall foliage	70%	70%		54%	51%▲
Has interesting small towns to explore	66%	62%▲		54%	50%▲
Offers beautiful scenery	66%	64%		54%	48%▲
Offers a sense of history as part of the landscape	65%	59%▲		54%	48%▲
Has lots of historic sites to visit	64%	61%		54%	50%▲
Great place to rest and relax	62%	58%▲		54%	48%▲
Offers great inns/B&Bs	61%	56%▲		52%	51%
Great place to spend time with my spouse/significant other	60%	57%▲		52%	48%▲
Has friendly, welcoming people	58%	54%▲		51%	45%▲
Has winter activities	57%	51%▲		51%	49%
Is a good place for hiking/biking	57%	55%		50%	46%▲
Offers casino entertainment	57%	59%		49%	45%▲
Great place to spend time with my friends	57%	53%▲		47%	41%▲
Offers a romantic escape	56%	51%▲		46%	46%
Has lots of things to see and do	55%	54%		45%	40%▲
Is a good place for boating	55%	54%		44%	38%▲
			Has great antiquing		
			Has nice resorts/spas		
			Has vineyards/wineries		
			Has great shopping		
			Is a fun destination		
			Offers arts and culture		
			Offers great culinary experiences		
			Great place to spend time with children		
			Offers a good value for the money		
			Offers "pick your own" farms		
			Is a good place for fishing		
			Good place for golfing		
			Offers action/adventure sports (e.g., zip lining, rock climbing)		
			Has great beaches		
			Offers exciting nightlife		
			Has great theatre		

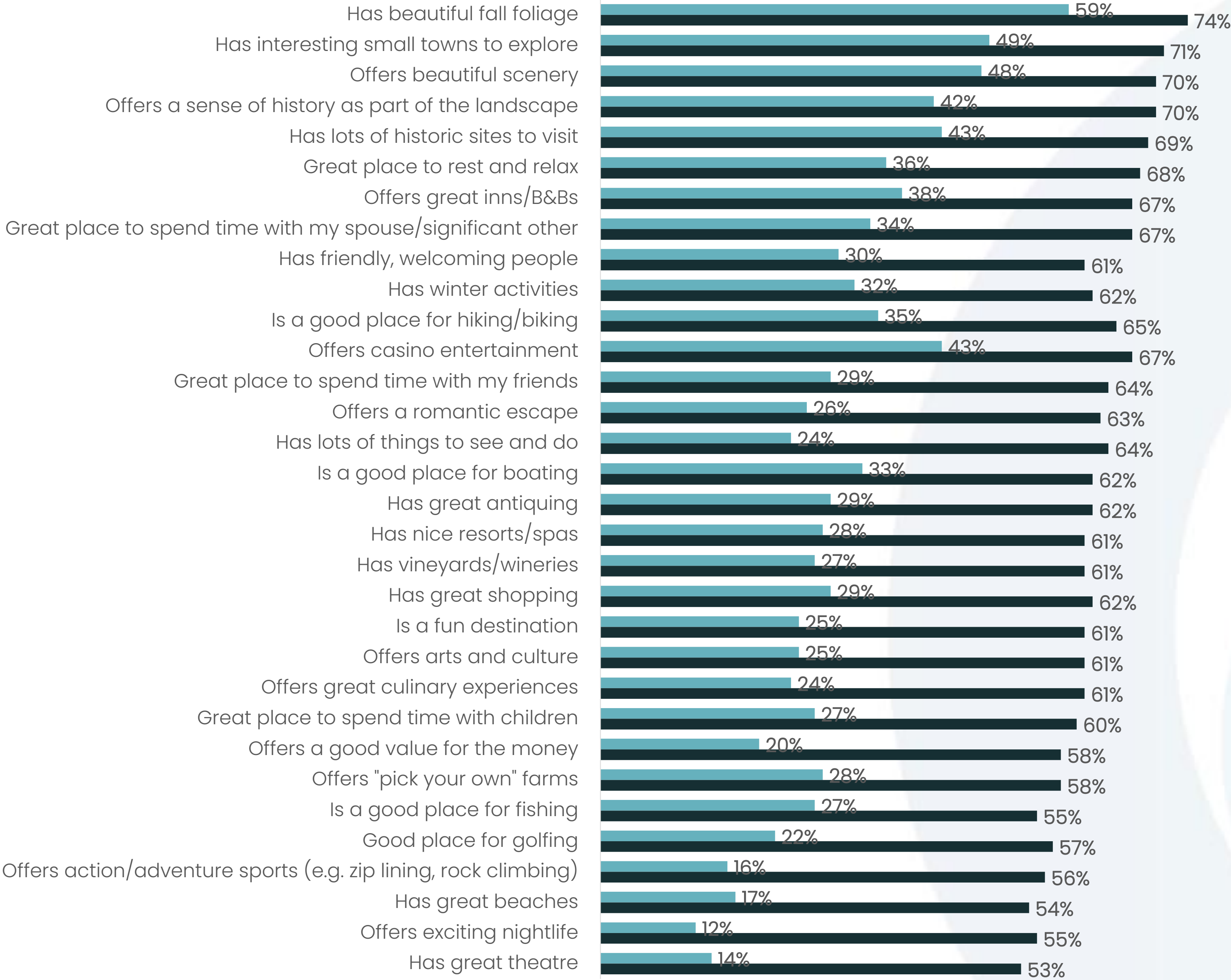
Q22: Using a five-point scale where 1 is "doesn't describe well at all" and 5 is "describes extremely well," indicate how well each statement describes Connecticut as a place to visit.
▲ Denotes a statistically significant variance to 2020 scores.

Brand Characteristics

Connecticut’s marketing has a significant impact on how travelers view the state.

Those who are marketing aware rate the state an average of 32 points higher than those who did not see any of the marketing.

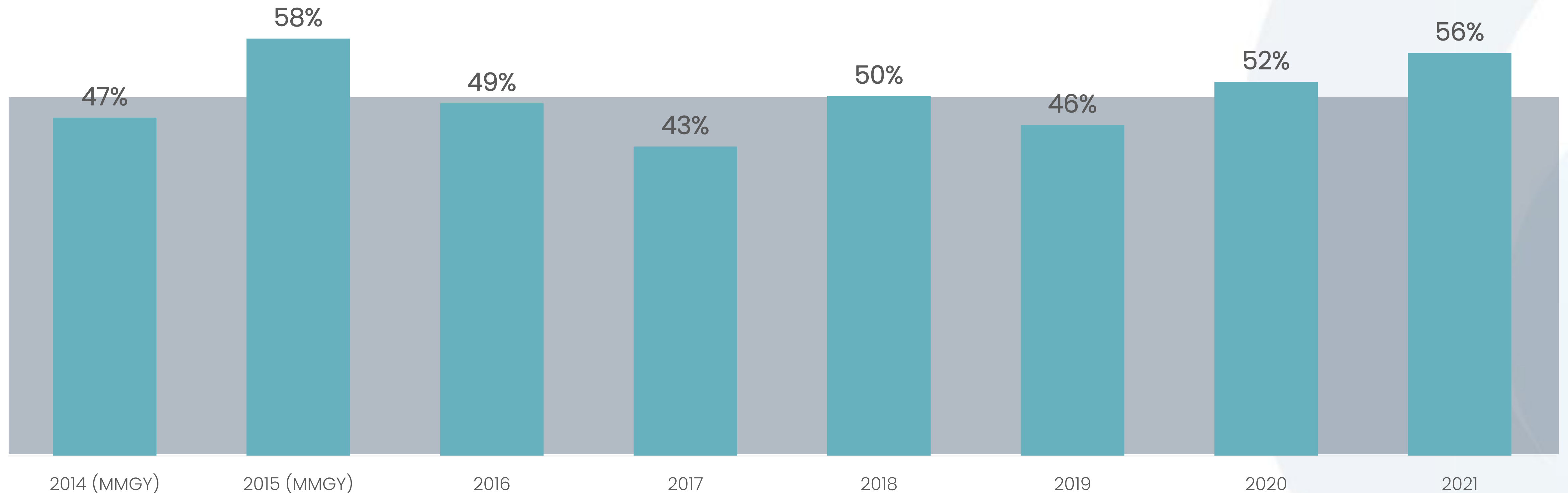
The biggest variance comes in the area of believing Connecticut offers exciting nightlife (42 points between marketing aware vs unaware).



■ Unaware of CT Marketing ■ Aware of CT Marketing

The average brand characteristic rating has been on the rise since 2019, significantly exceeding the historical average for the past two years. And, increasing a significant nine points from 2014.

History of Brand Characteristics Average Score – % Describes CT Well/Extremely Well
CT Historical Average: 50%



The words used to describe Connecticut also posted notable increases in nearly every category when compared to 2020.

Describes CT well/extremely well	2021	2020		2021	2020
Historical	67%	62%	▲	Pretentious	54% 44% ▲
Traditional	65%	58%	▲	Fresh	53% 47% ▲
Upscale	64%	53%	▲	Vibrant	52% 46% ▲
Clean	63%	60%	▲	Down-to-earth	52% 48% ▲
Quaint	63%	59%	▲	Diverse	52% 44% ▲
Authentic	61%	53%	▲	Contemporary	51% 44% ▲
Nature-oriented	60%	53%	▲	Inspiring	50% 42% ▲
Friendly	60%	52%	▲	Revolutionary	50% 41% ▲
Close by	59%	59%		Exciting	50% 42% ▲
Smart	59%	50%	▲	Trendy	49% 44% ▲
Welcoming	58%	54%	▲	Affordable	49% 44% ▲
Sophisticated	58%	46%	▲	Innovate	49% 40% ▲
Cultural	58%	49%	▲	Bold	44% 37% ▲
Artsy	56%	46%	▲	Unexpected	43% 37% ▲
Fun	55%	50%	▲		

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 2020 scores.

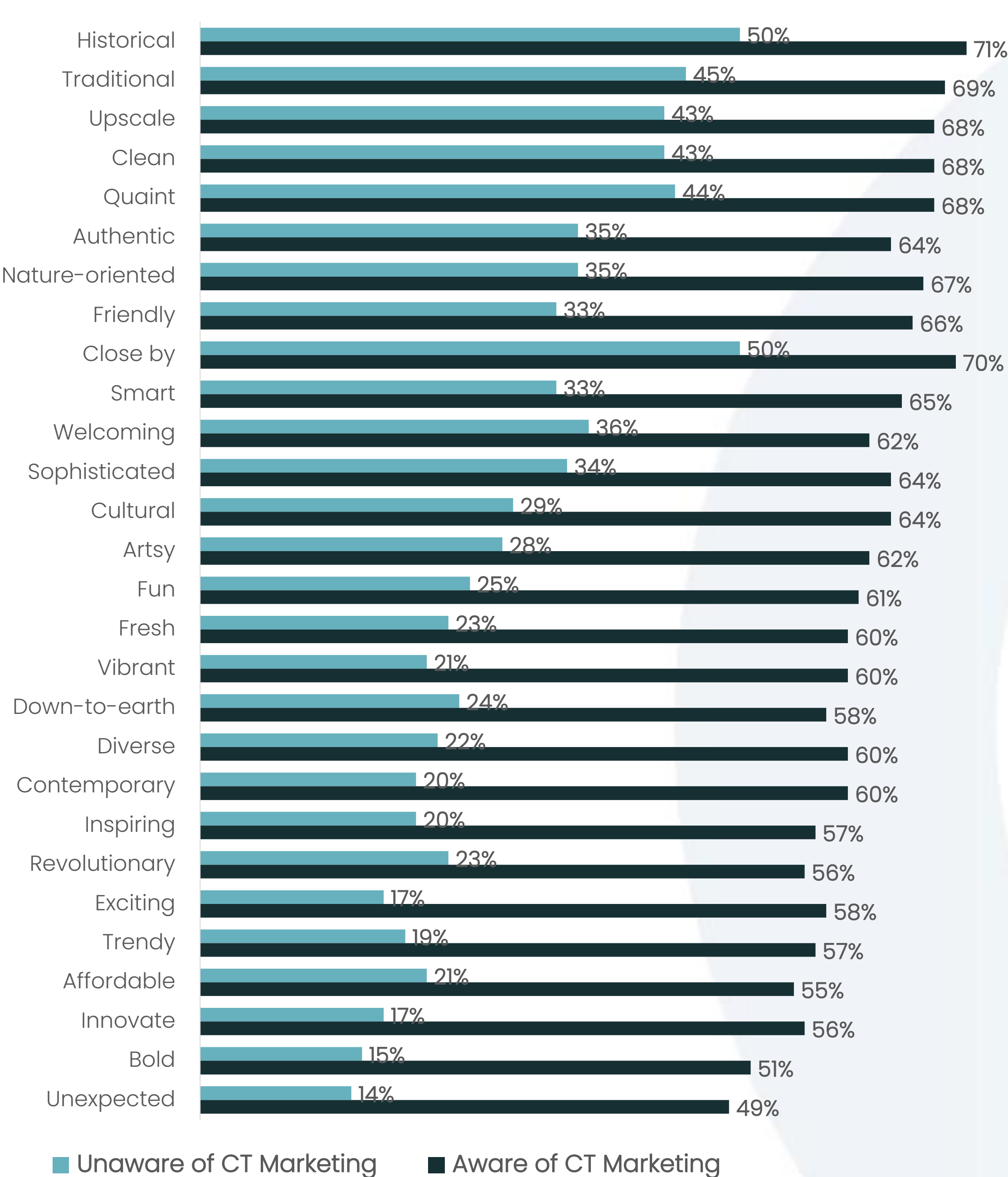
RESPONDENT BASE: ALL RESPONDENTS | N=1,000

Brand Descriptors

Likewise, Connecticut’s marketing also has a significant impact on how travelers describe Connecticut.

The brand descriptors average 61% for those aware of Connecticut’s marketing, while the average for those unaware is only 30%.

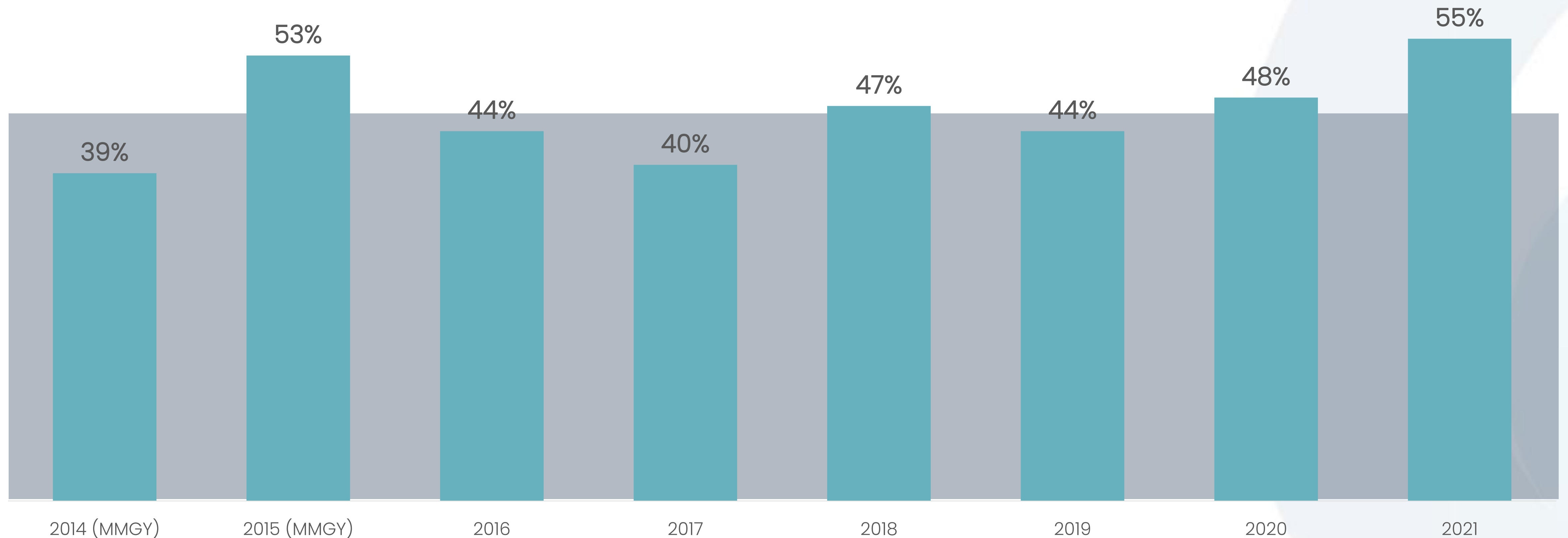
Those unaware of the marketing are far less likely to view Connecticut as exciting (-41 points) compared to those marketing aware, marking the biggest difference in opinion between the two groups.



The average score for Connecticut's brand descriptors have also been on the rise since 2019—and has increased 16 points since they were first recorded in 2014 by MMGY.

History of Brand Descriptors Average Score – % Describes CT Well/Extremely Well

CT Historical Average: 46%



And the perception of Connecticut as a place to do business also grew more positive across all categories.

Describes CT well/extremely well	2021	2020	
A place with a good quality of life	66%	57%	▲
Has lots of educated people if you are hiring	63%	57%	▲
Great place to have kids and raise a family	61%	53%	▲
Great place to live	59%	50%	▲
A progressive state	56%	51%	▲
A great place to meet interesting people	55%	48%	▲
Place with creative people	55%	48%	▲
A great place for businesses to network	54%	46%	▲
Has lots of quality skilled labor if you are hiring	54%	47%	▲
Great place to work	54%	46%	▲
Friendly to businesses	53%	45%	▲
State with lots of diversity	52%	46%	▲
Place with innovative people	52%	46%	▲
A state with a lot of growth	51%	46%	▲
A place you can get things done quickly	51%	40%	▲
Great place for innovation	51%	41%	▲
A dynamic, innovative state	51%	43%	▲
A place of ingenuity	50%	42%	▲
Great place to relocate an existing business	48%	40%	▲
Great place to start up a business	48%	41%	▲

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)

▼▲ Denotes a statistically significant variance to 2020 scores.

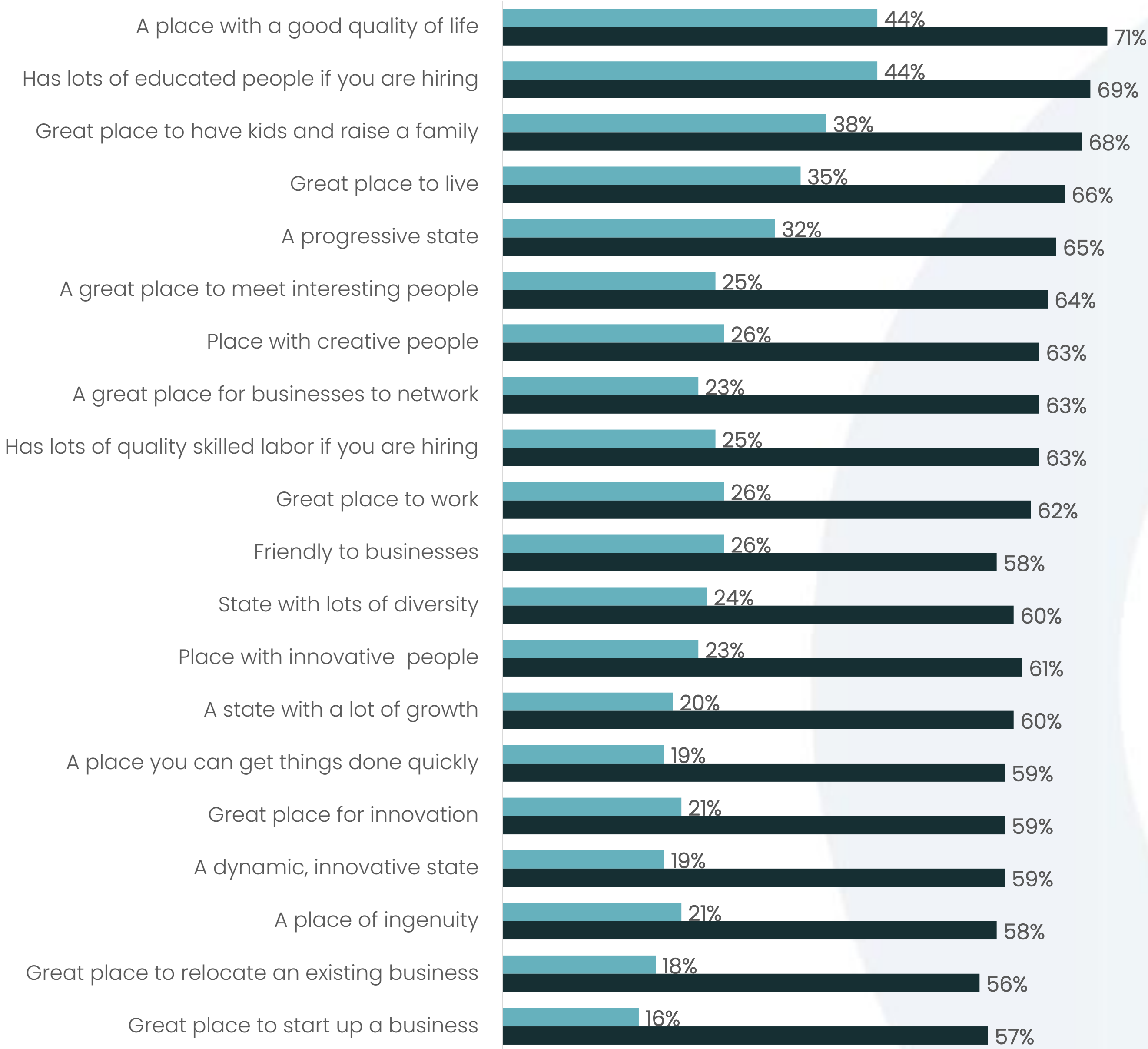
RESPONDENT BASE: ALL RESPONDENTS | N=1,000

Business Characteristics

Once again, Connecticut’s marketing also has a significant impact on how travelers rate the state on the set of business characteristics tested.

Those who have seen Connecticut’s marketing rate these characteristics an average of 36 points higher than those who have not seen the marketing.

Those aware and unaware of the marketing both rate “a place with a good quality of life” the highest, but marketing aware travelers score this characteristic 27 points higher.

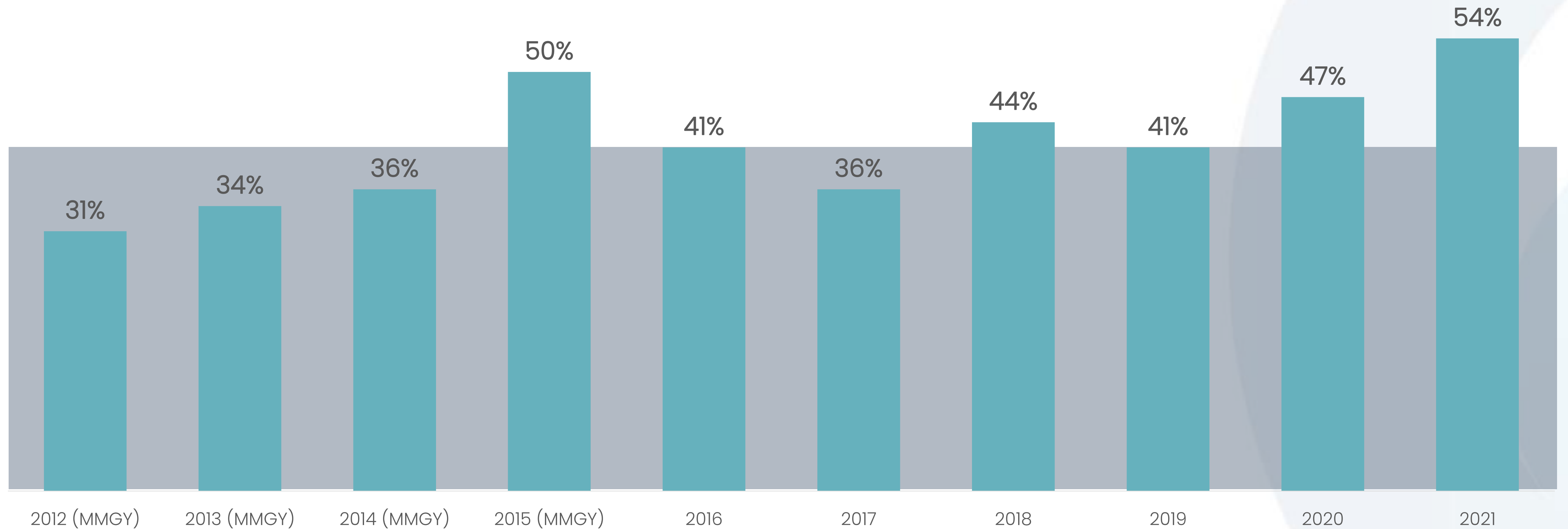


■ Unaware of CT Marketing ■ Aware of CT Marketing

The average score for business characteristics describing Connecticut has also been on the rise since 2019. And, significant improvement has been observed since the first year it was tracked in 2012.

History of Business Characteristics Average Score – % Describes CT Well/Extremely Well

CT Historical Average: 41%



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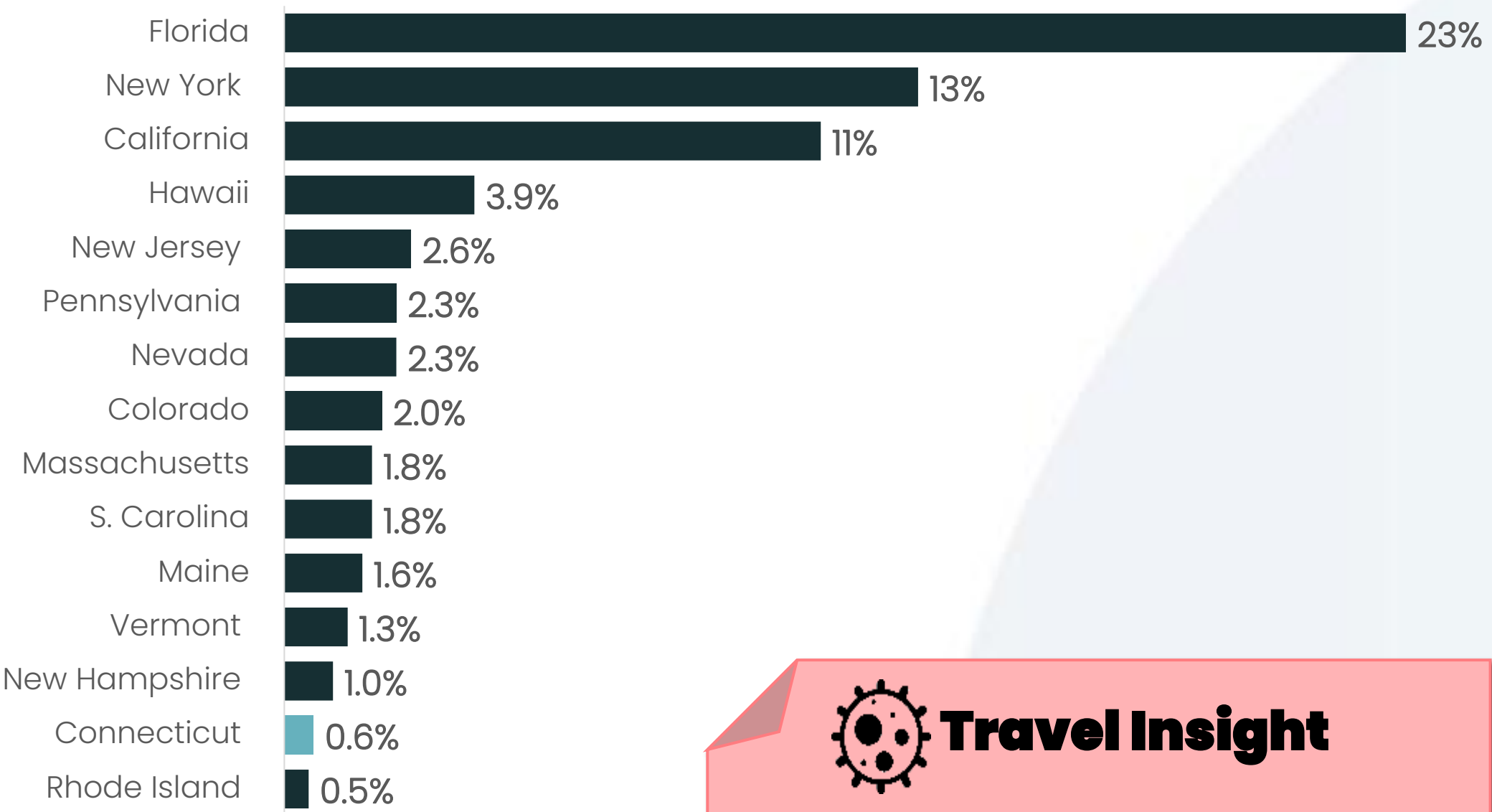
Brand Health

Unaided Brand Awareness

The pandemic and negative news cycle that has dominated the world since 2020 continues to push top of mind thinking about regional travel down the list of priorities.

In fact, on average, competitive destinations experienced another 4-point decline in top-of-mind awareness in 2021.

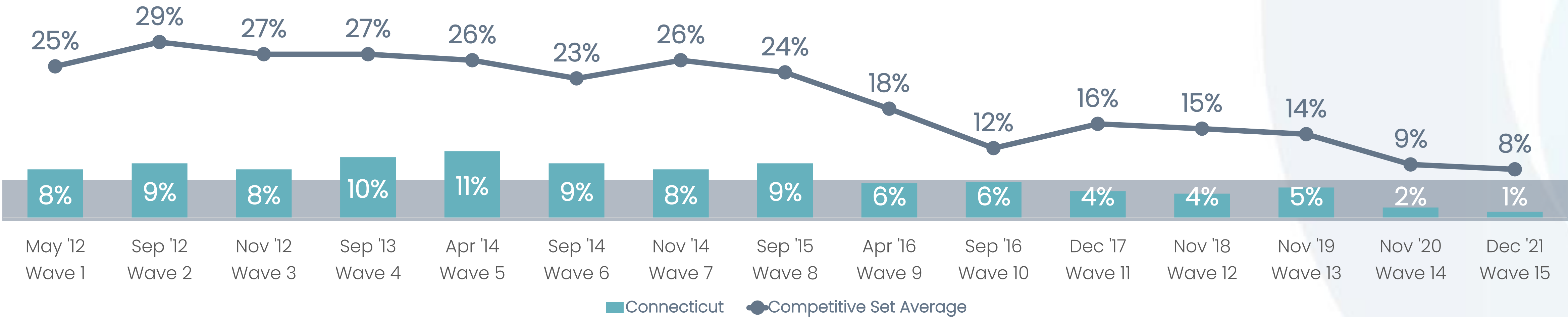
Unaided Brand Awareness – Competitive States



News about Covid-19 continued to dominate the news cycle in 2021 and continued to push top of mind awareness lower.

Unaided Brand Awareness History

CT Historical Average: 7%

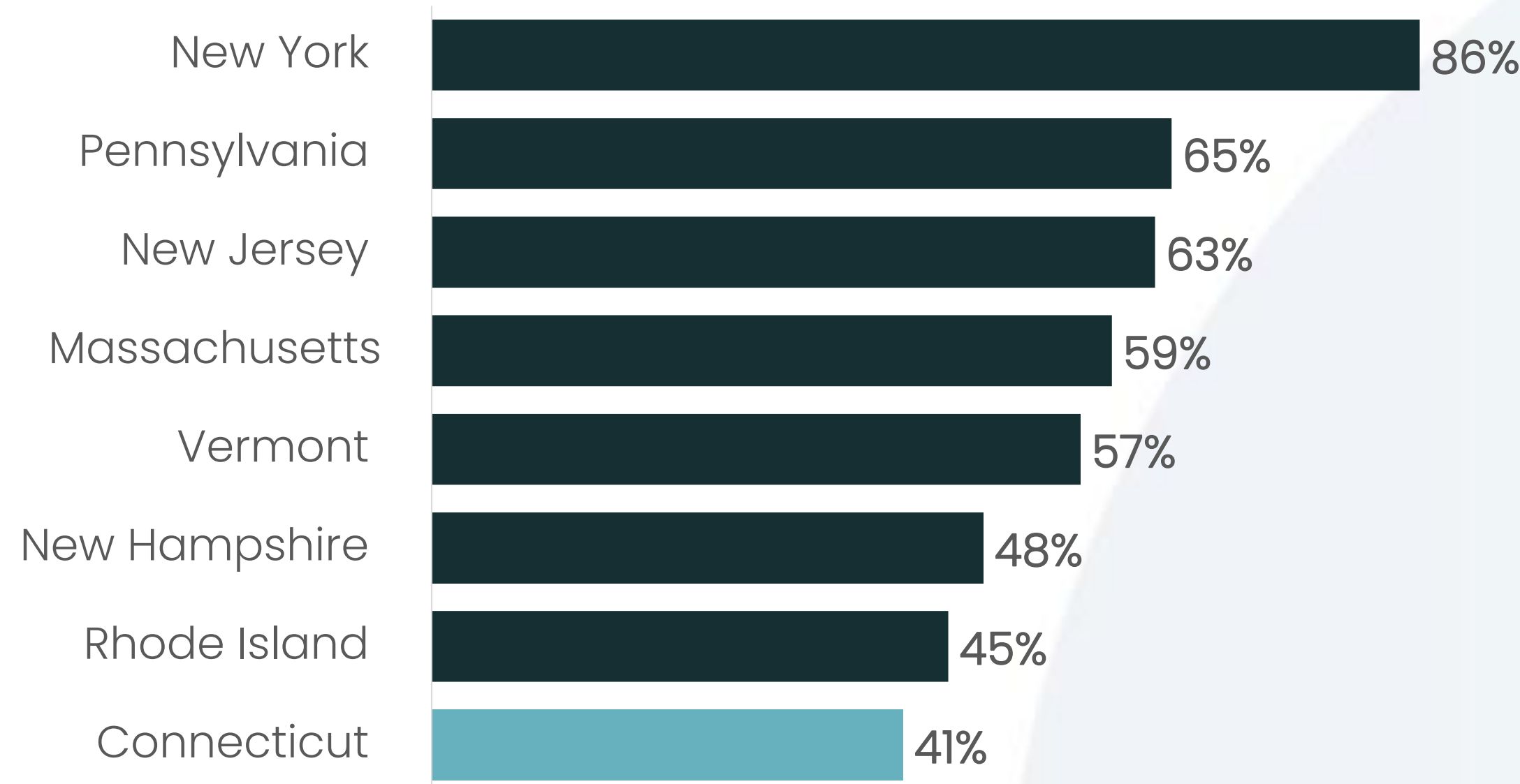


Aided Brand Awareness

Nearly half of travelers in New England age 25-64 this year were familiar with Connecticut as a place to visit or travel to.

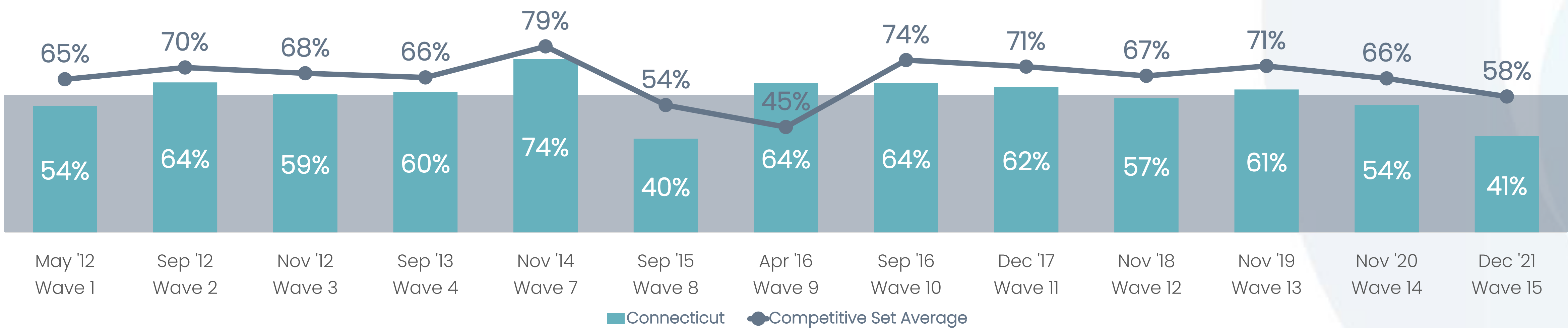
Aided brand awareness, however, saw a 13-point decline compared to last year. On average, competitive states experienced a similar phenomena as average brand awareness across the competitive set also experienced an 8-point decline in awareness compared to 2020.

Aided Brand Awareness – Competitive States



Aided Brand Awareness History

CT Historical Average: 58%



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

One in ten travelers indicated they visited Connecticut at some point in the past 5 years, down 16 points from last year.

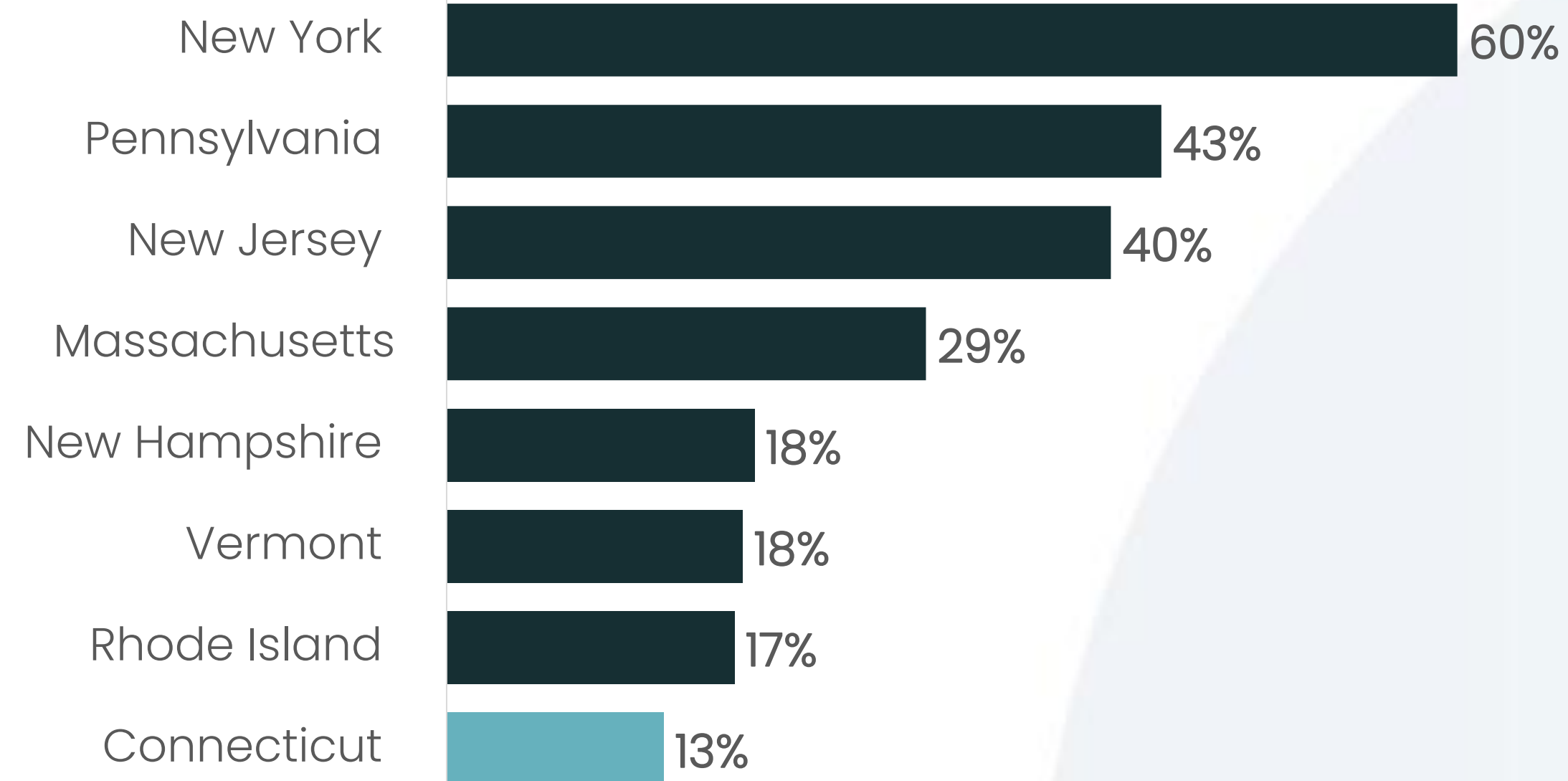
On average, competitive states also experienced an 8-point decrease in visitation.



Travel Insight

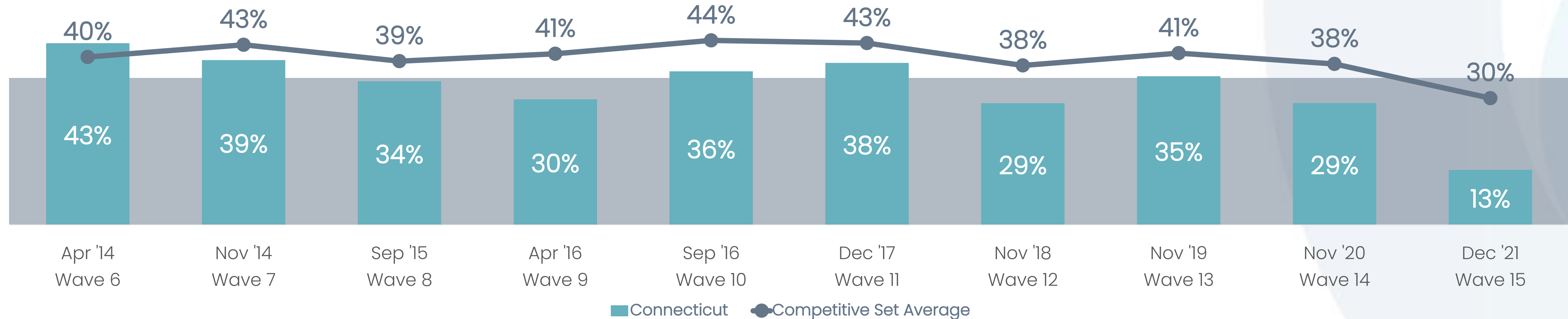
Travelers continued to drop trips over the past two years—affecting destinations across the country.

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.

RESPONDENT BASE: ALL RESPONDENTS | N=1,000

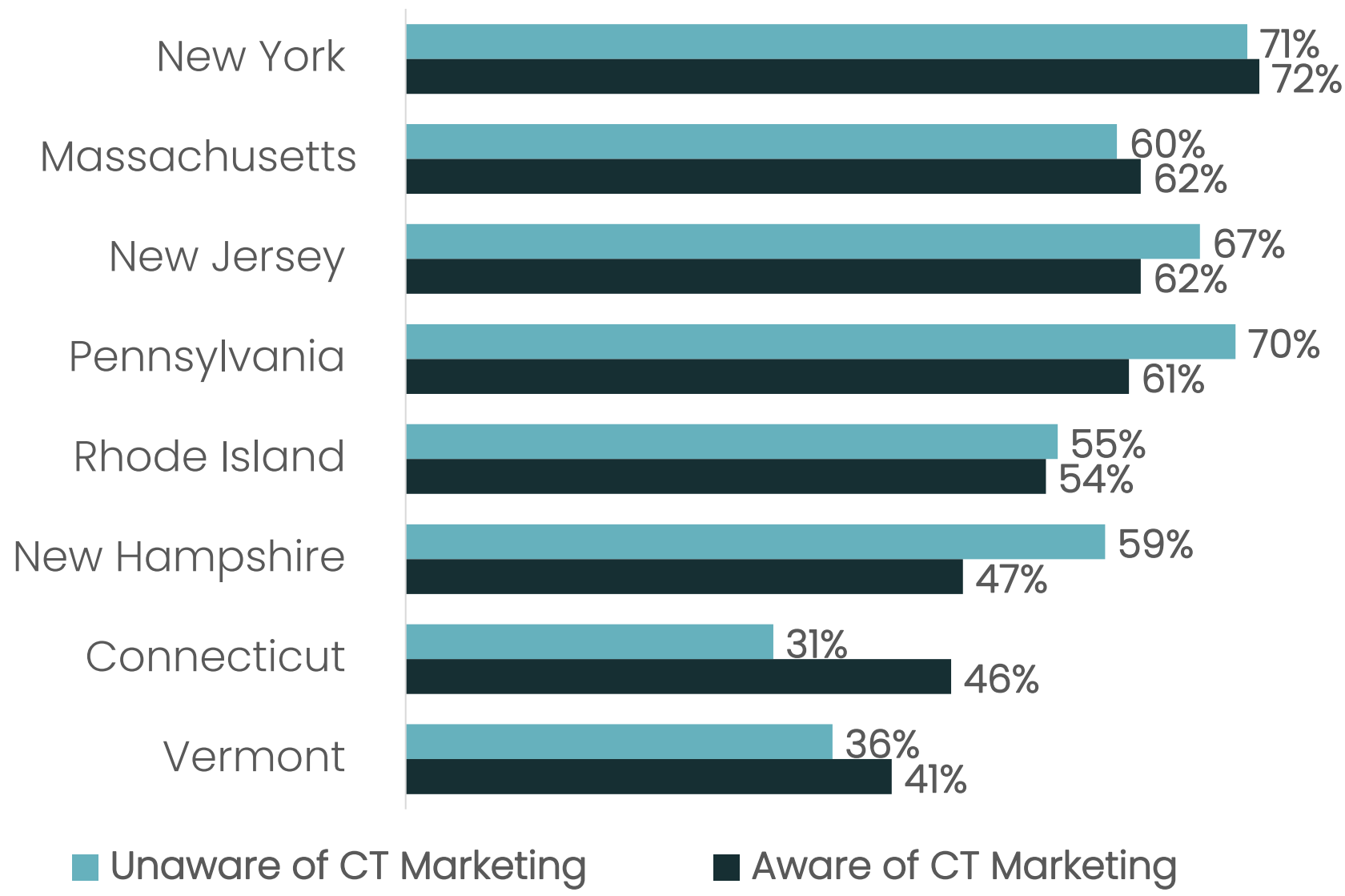
Conversion Rates

Given the decline of travel across the board in 2020 and 2021, it is unsurprising to see conversion rates decline across all competitive states, including Connecticut.

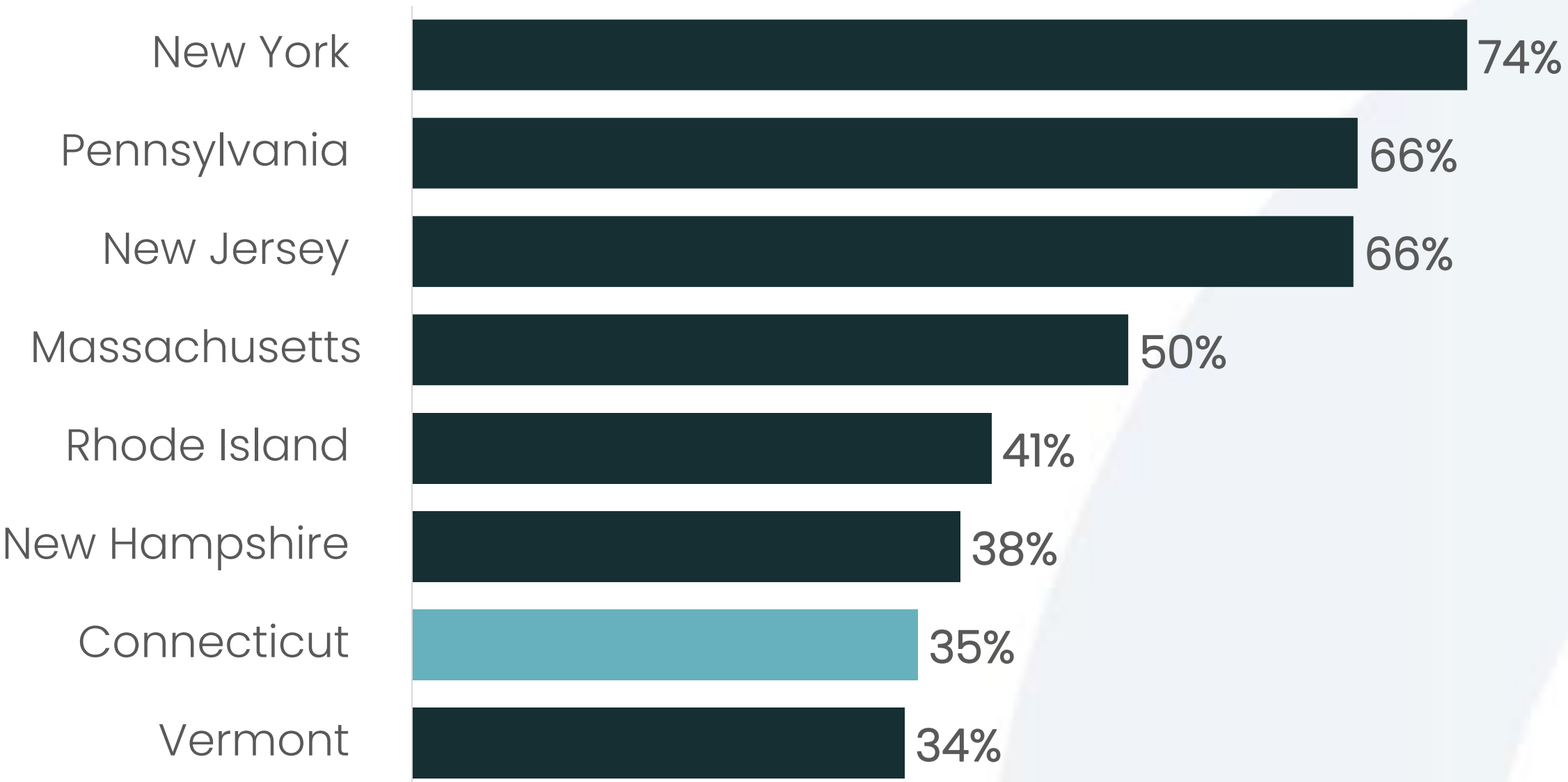
Conversion rates for Connecticut fell 20 points this year while the average competitor in the Northeast saw their conversion rate drop by 8 points as well.

However, those aware of Connecticut’s marketing converted into visitors at a much higher level than those unaware of the marketing.

Conversion Rates by Marketing Awareness

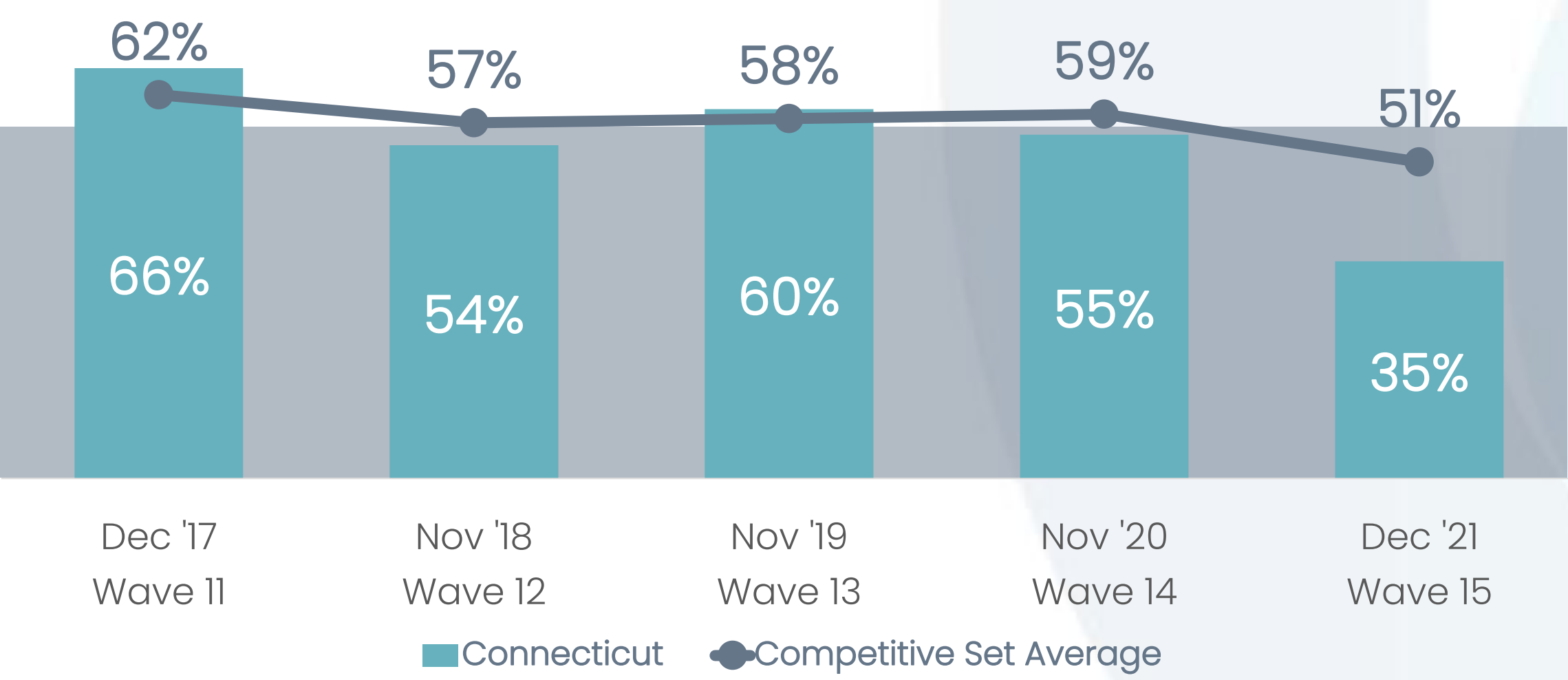


Conversion Rates – Competitive States



Conversion Rates History

CT Historical Average: 54%



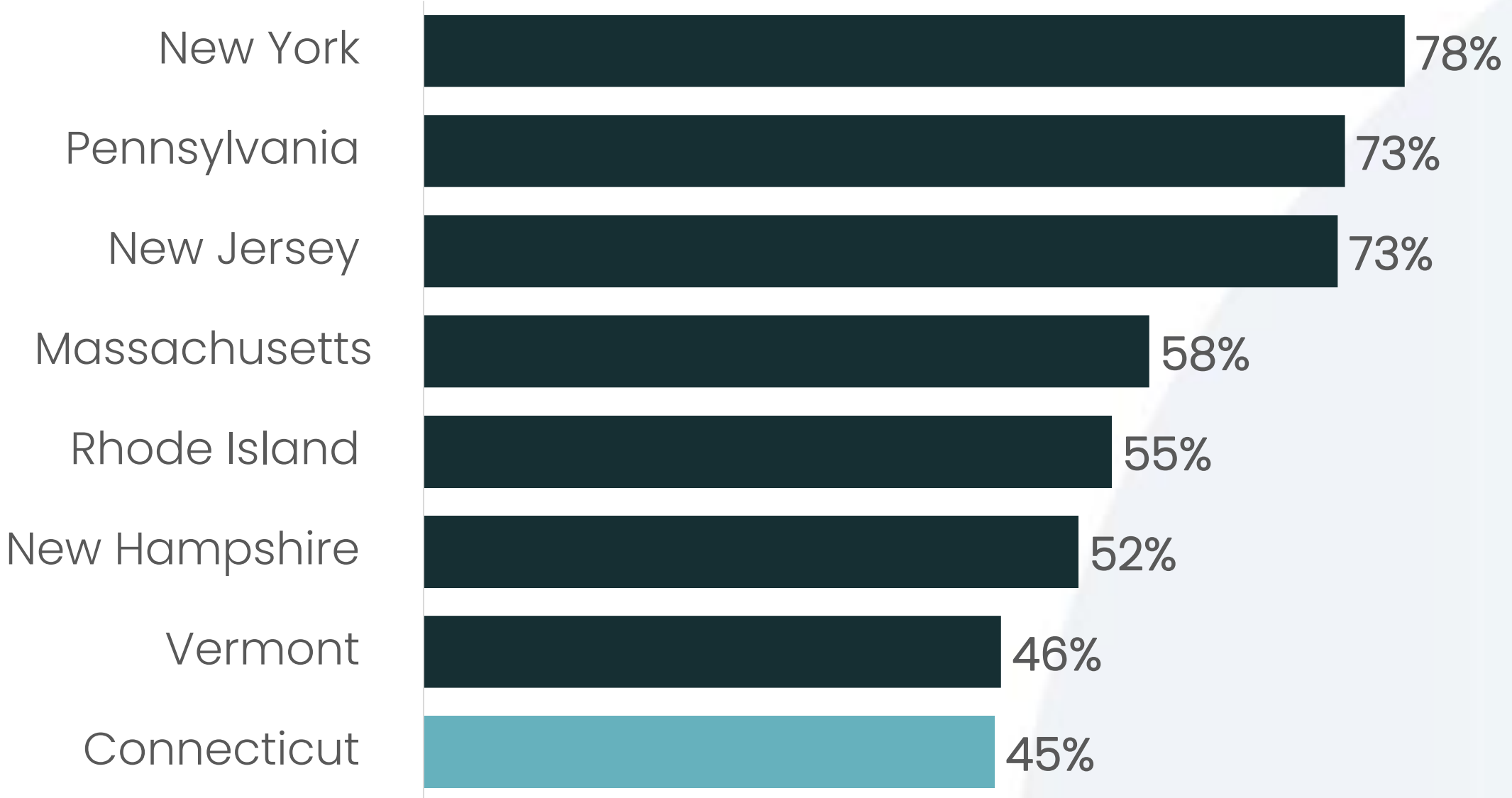
Q11: Using the scale provided, please indicate which of the following destinations you have visited for a getaway.

Retention Rates

Nearly half of travelers who have ever visited Connecticut returned at some point in the past 5 years. But with fewer visitors the past 2 years, retention rates dropped in both Connecticut and the Competitive Set.

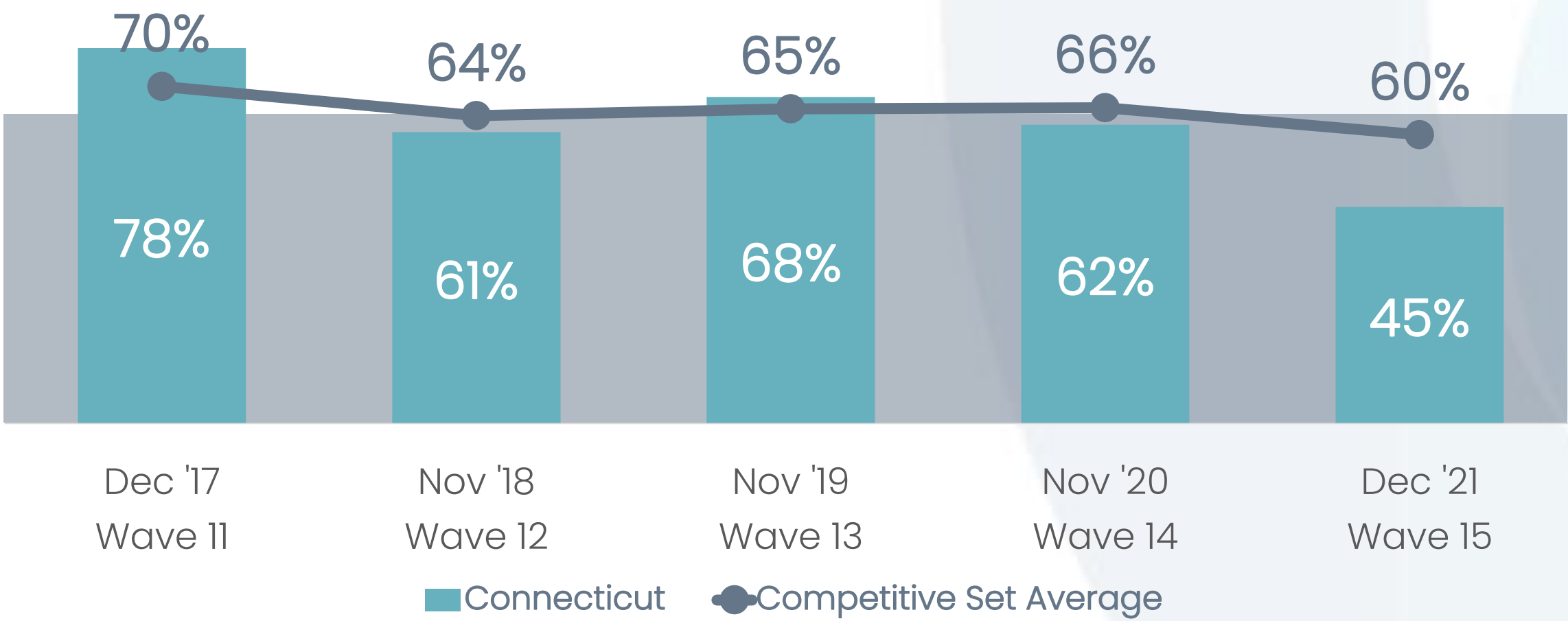
While Connecticut earned retention rates on par with Vermont, the overall decline was directionally similar with that of the competitive set as a whole.

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

While travel has taken a hit since COVID-19 arrived, interest in visiting Connecticut increased to 54% this year—up another 4 points.

The large increase in interest over the past 2 years was experienced across all regional destinations with an average 4-point increase. This is likely due to pent-up demand for travel that has accumulated over the past 2 years. Furthermore, in 2021 the increase in interest for Connecticut topped the state’s historic average of 51%.



Travel Insight

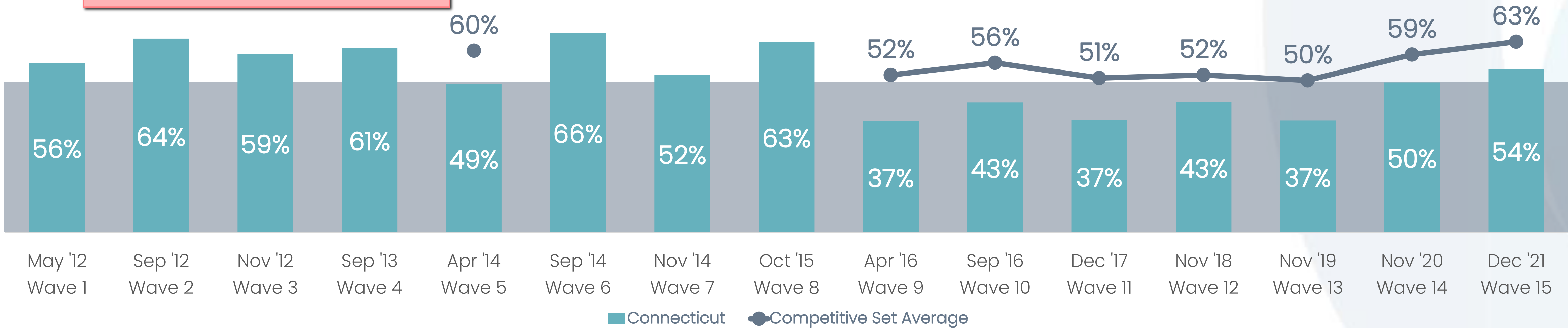
Being cooped up at home created pent-up interest and demand for travel across the region and especially for Connecticut

Interest in Visiting – Competitive States



Interest in Visiting History

CT Historical Average: 51%



Intent to Visit in 2022

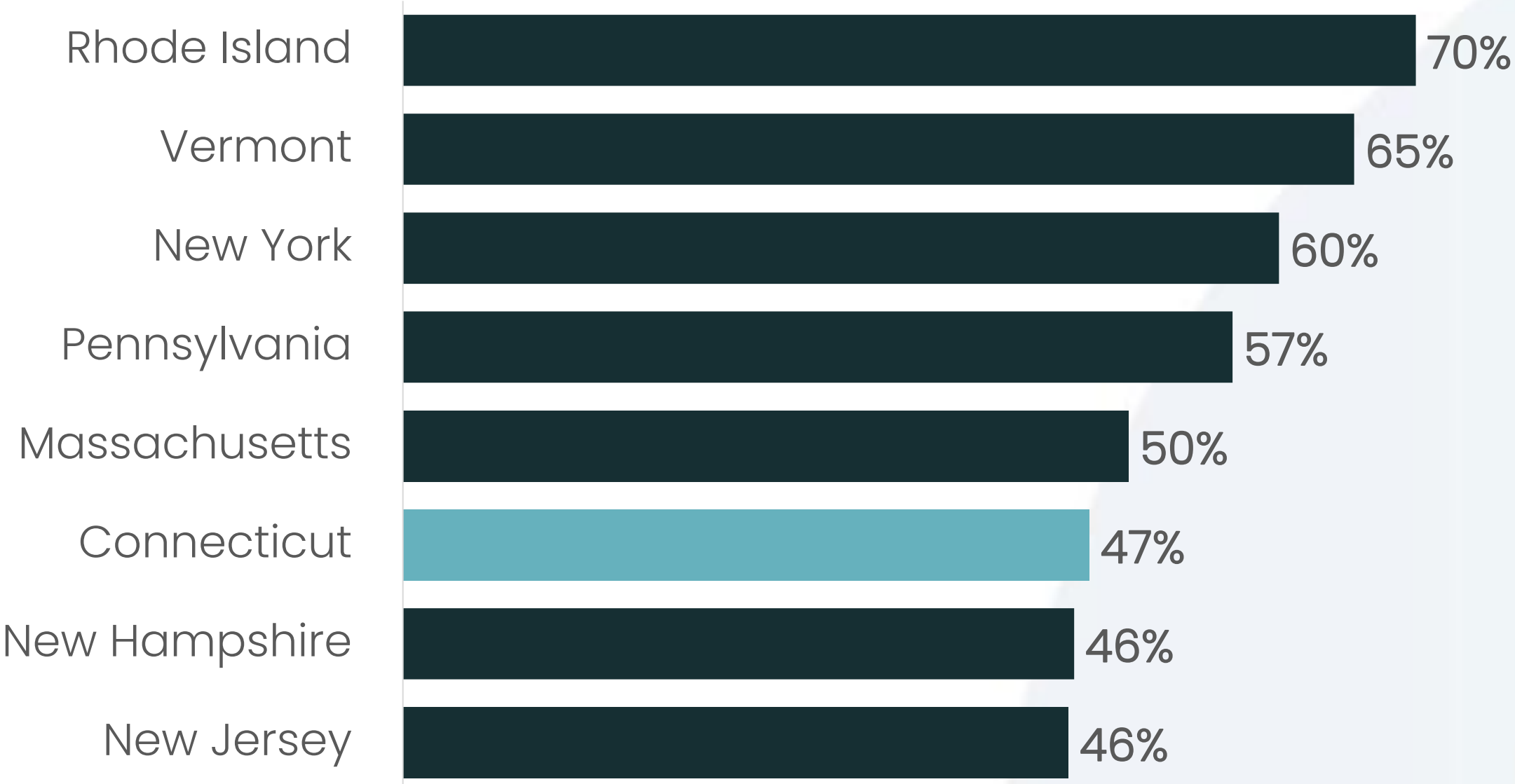
Similar to the increase in interest, intent to visit in 2022 also enjoyed a nice surge this year. Intent to visit Connecticut in the next 12 months increased three points to post the highest level it has been at since 2019.

Intent to visit states in the competitive set also saw an increase in intent averaging 6 points over 2020 levels.

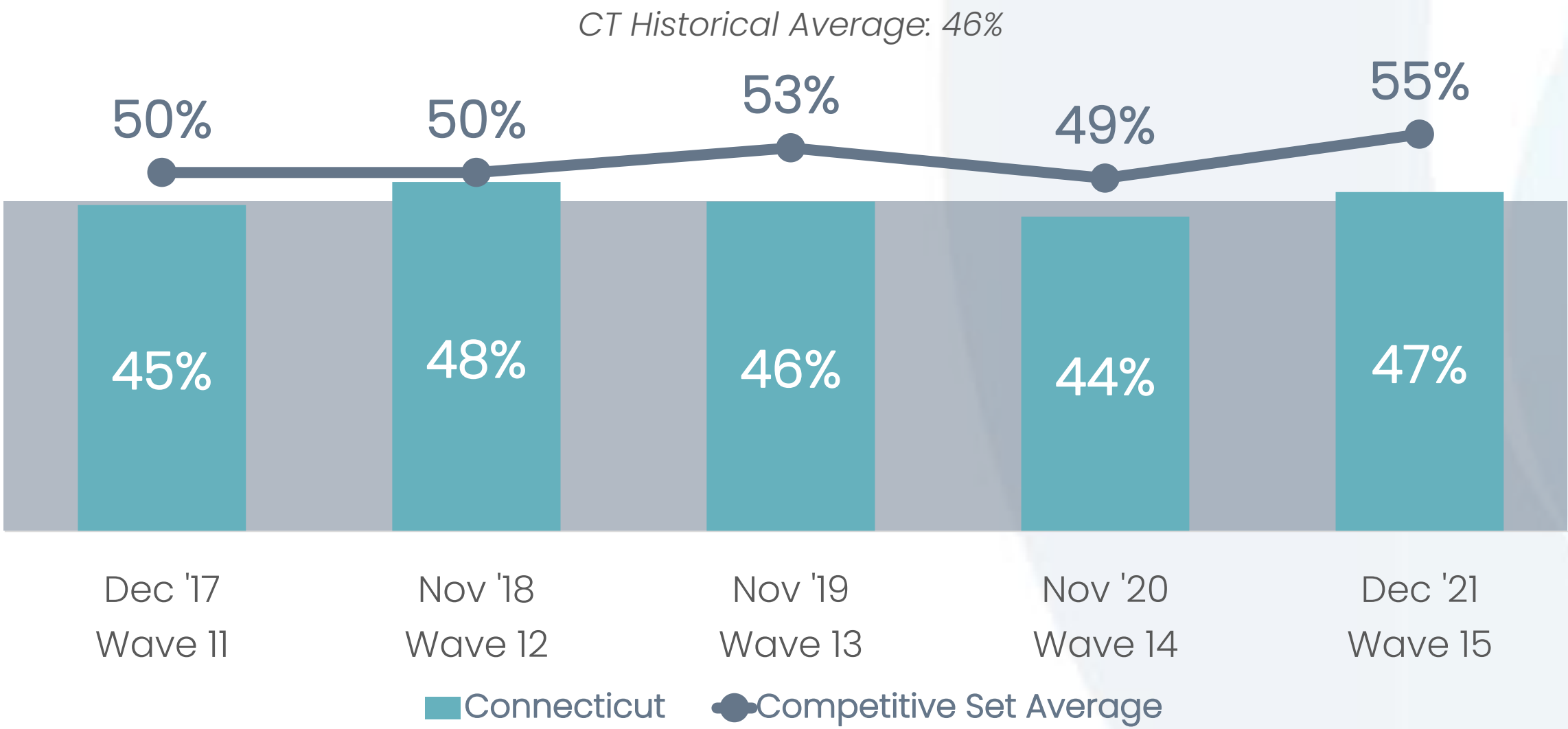
**Travel Insight**

Travelers are ready, willing and able to venture out again – and they intend to do so in 2022.

Intent to Visit in 2022 – Competitive States



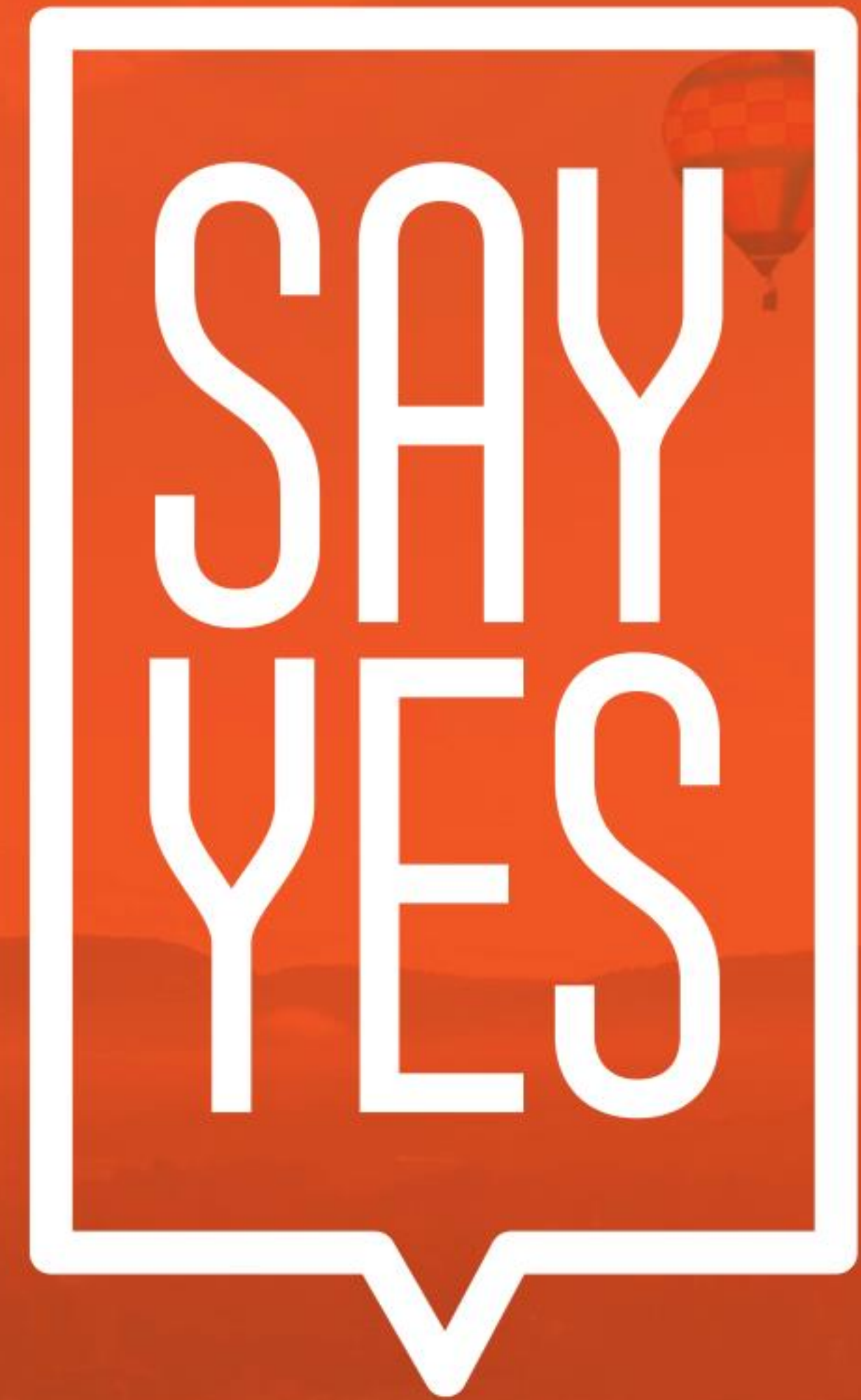
Intent to Visit in the Next 12 Months History



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

CTvisit.com
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Marketing Impact

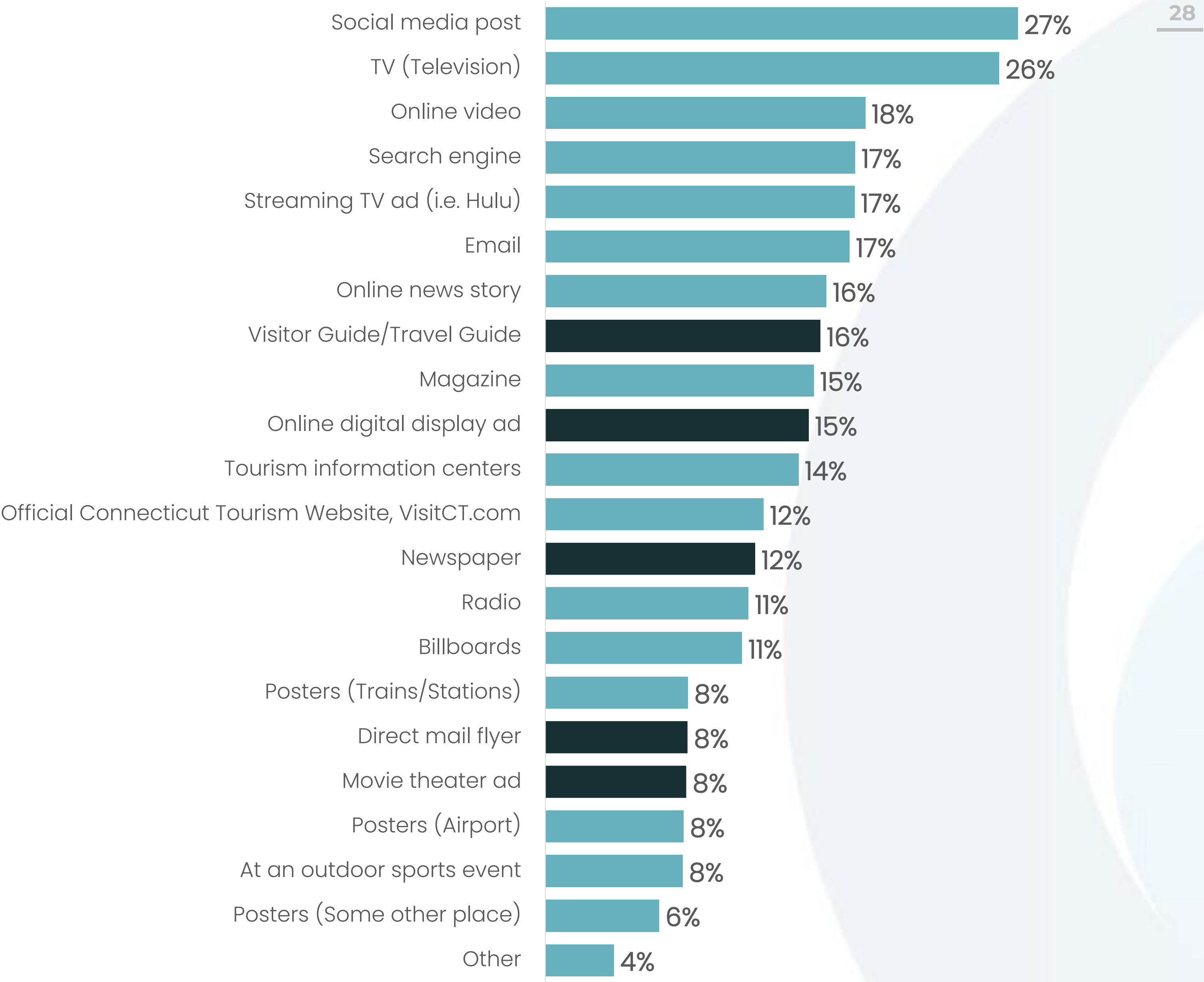


Connecticut[®]

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 tv, email, radio and billboards.



Q25: Which of the following types of marketing communications do you recall seeing, hearing or reading about that inspired you to visit Connecticut in 2021?

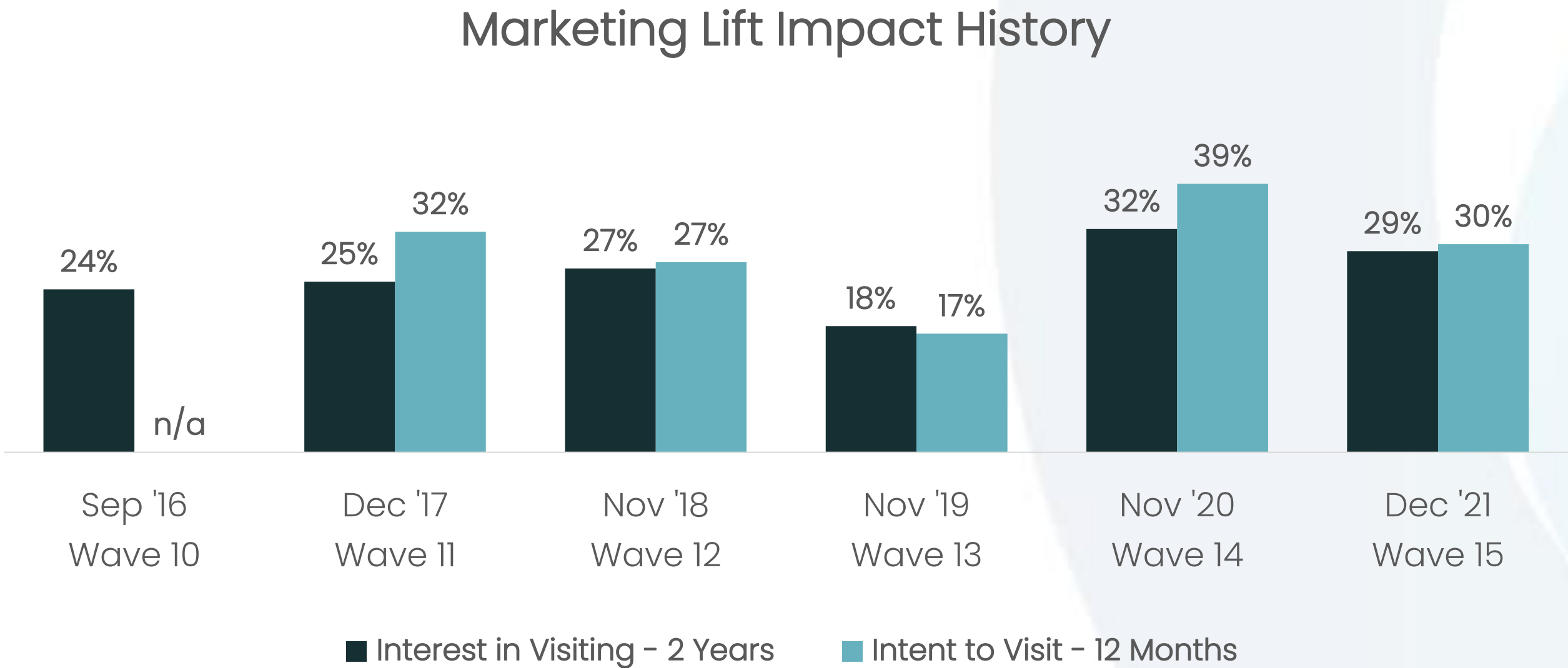
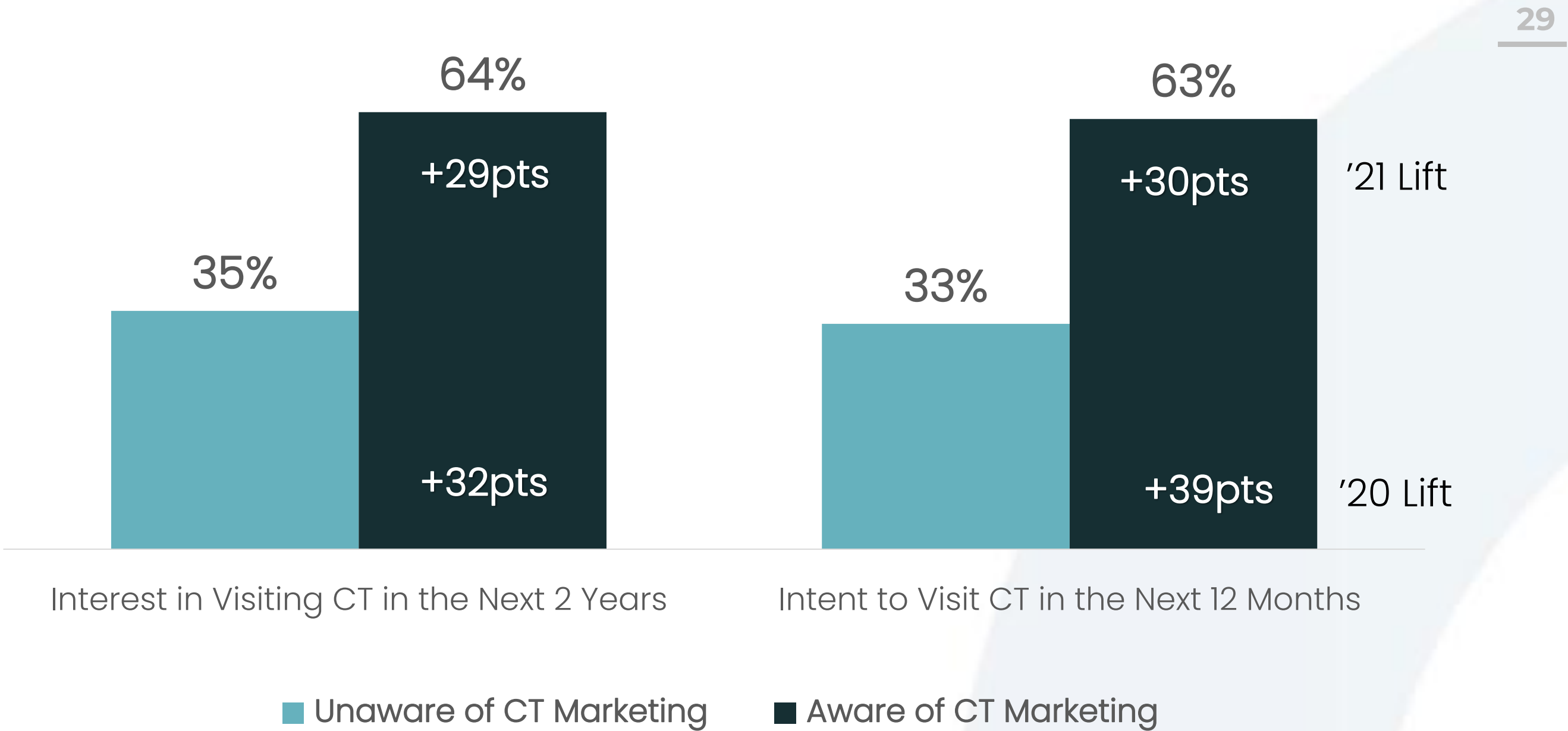
Interest & Intent

Aware vs. Unaware of CT Marketing

Connecticut’s marketing efforts have not only impacted traveler perceptions of the state as a travel destination but have also increased both interest and intent to visit.

In 2021, travelers who had seen Connecticut advertising were 29 points more likely to be interested in visiting than those who hadn’t seen ads. Similarly, those who had seen advertising were 30 points more likely 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.



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.

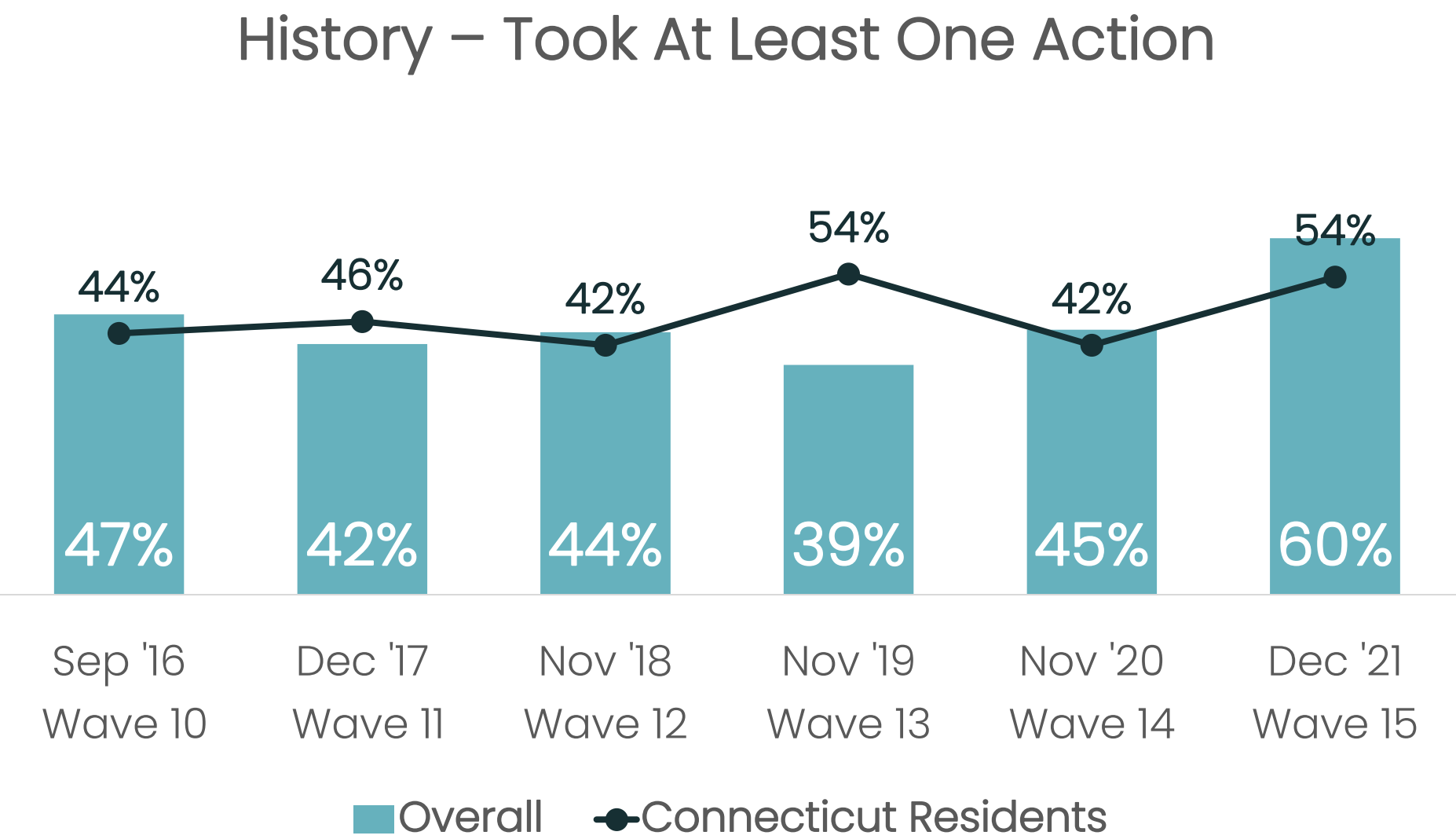
RESPONDENT BASE: ALL RESPONDENTS | N=1,000

Actions Likely to Take After Seeing Ads

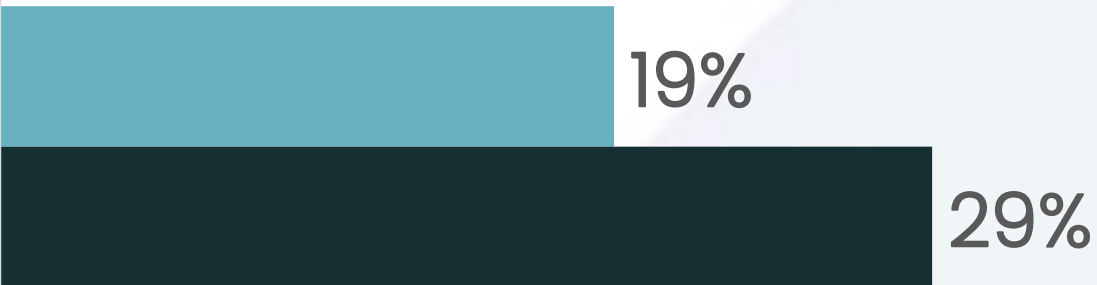
More importantly, 2021 ads were even more likely to have impacted travelers’ desire to plan a trip to Connecticut, do some research on visiting Connecticut and visiting the state’s website among other planning actions.

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 2021, 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 any previous year in history.



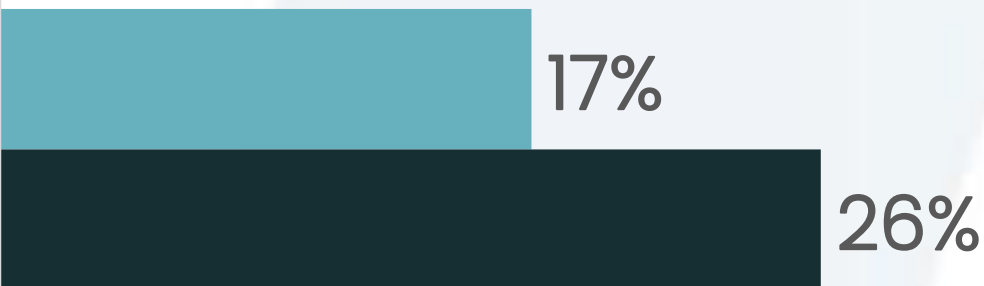
I looked into, or did some research, on visiting Connecticut after seeing or hearing an ad



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



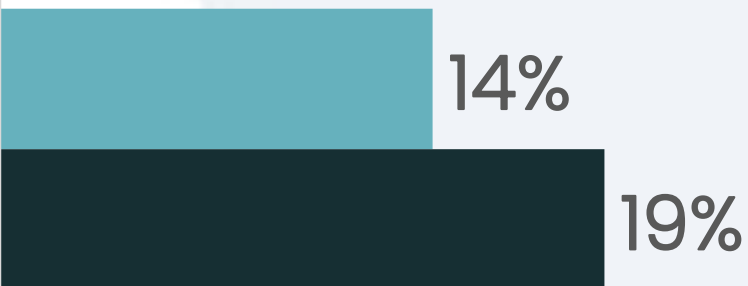
I am planning to visit Connecticut in the next year as a result of seeing or hearing an ad



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



2020 2021

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 the state’s advertising were also significantly more likely to agree that Connecticut is a great place for a short getaway, a great place to spend time with my spouse/significant other and a place worth visiting in the future.

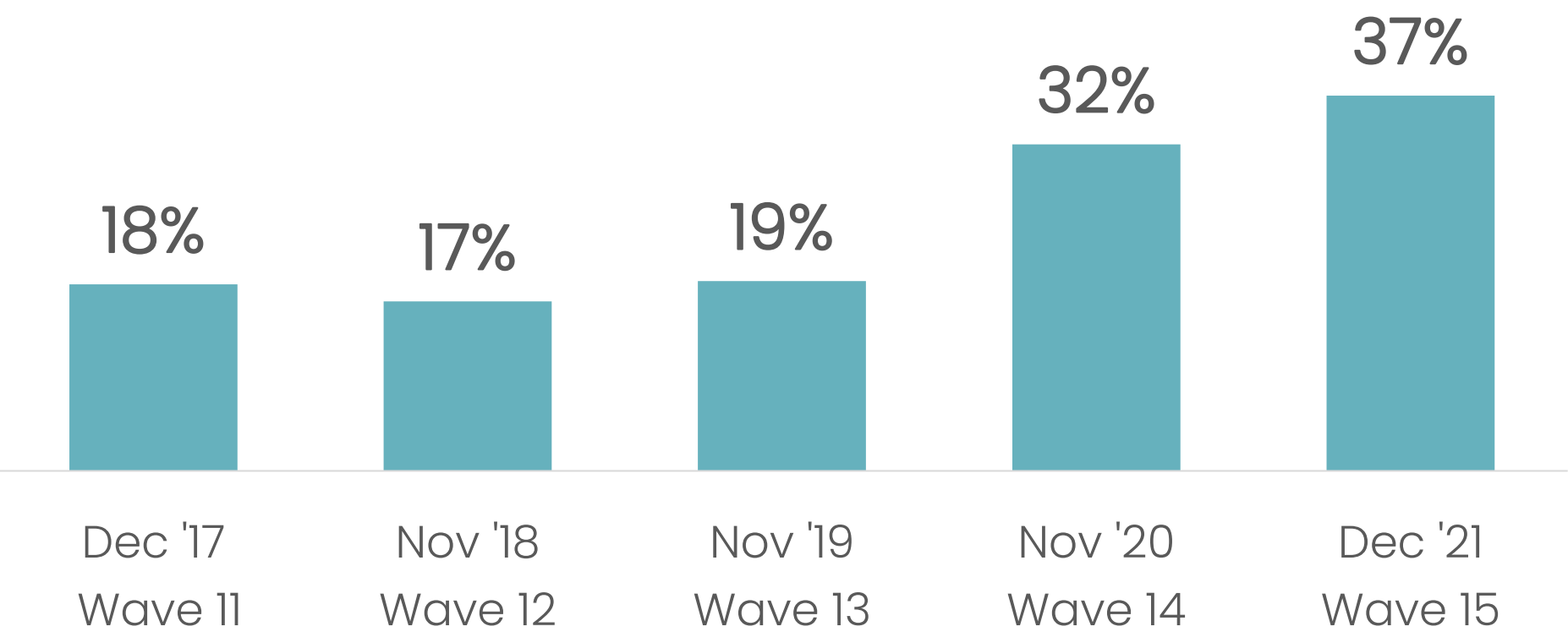
Every advertising takeaway about the state of Connecticut scored higher among those who had previously seen advertising for the state. In 2021, the average lift was 37 points.



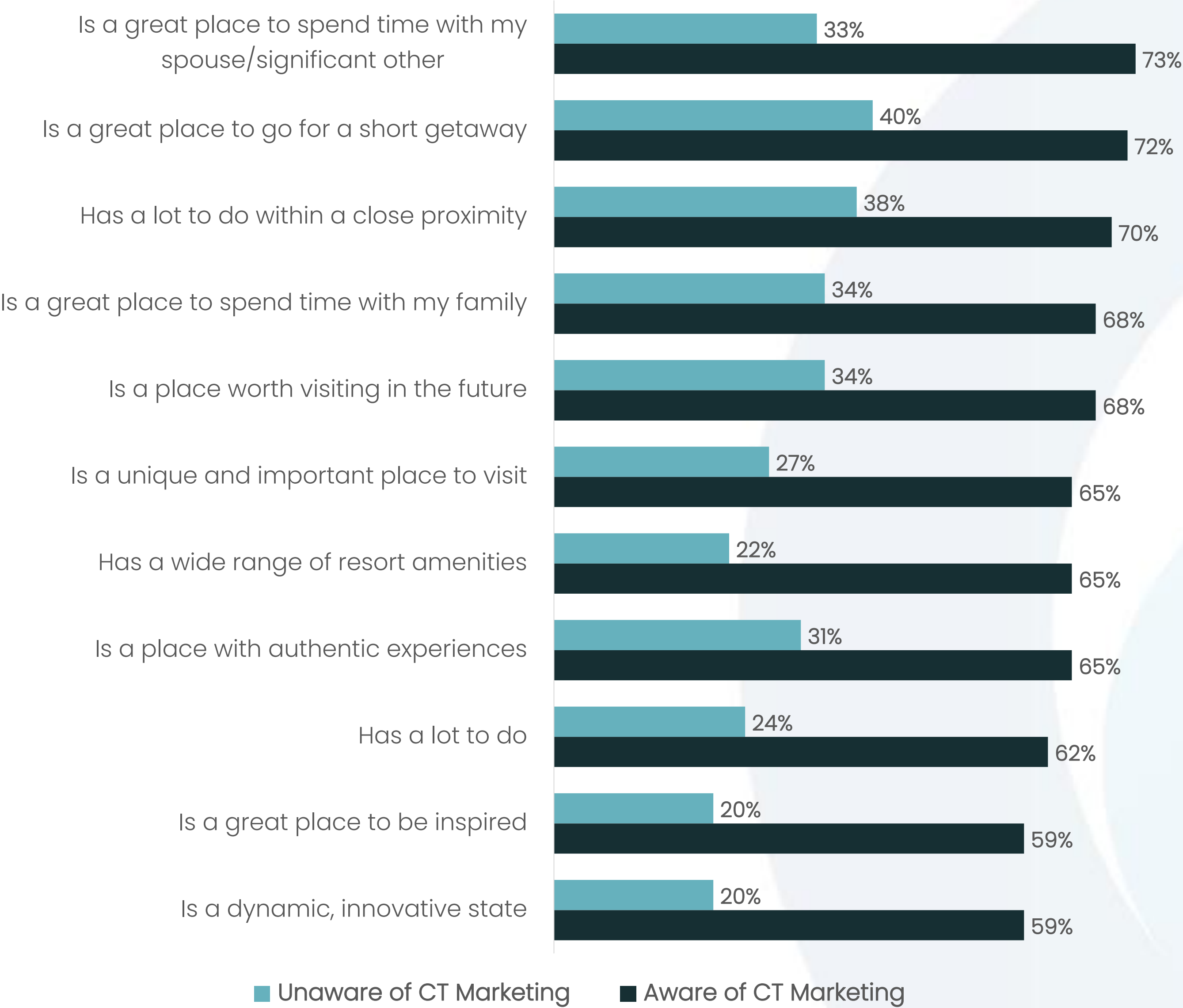
Travel Insight

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

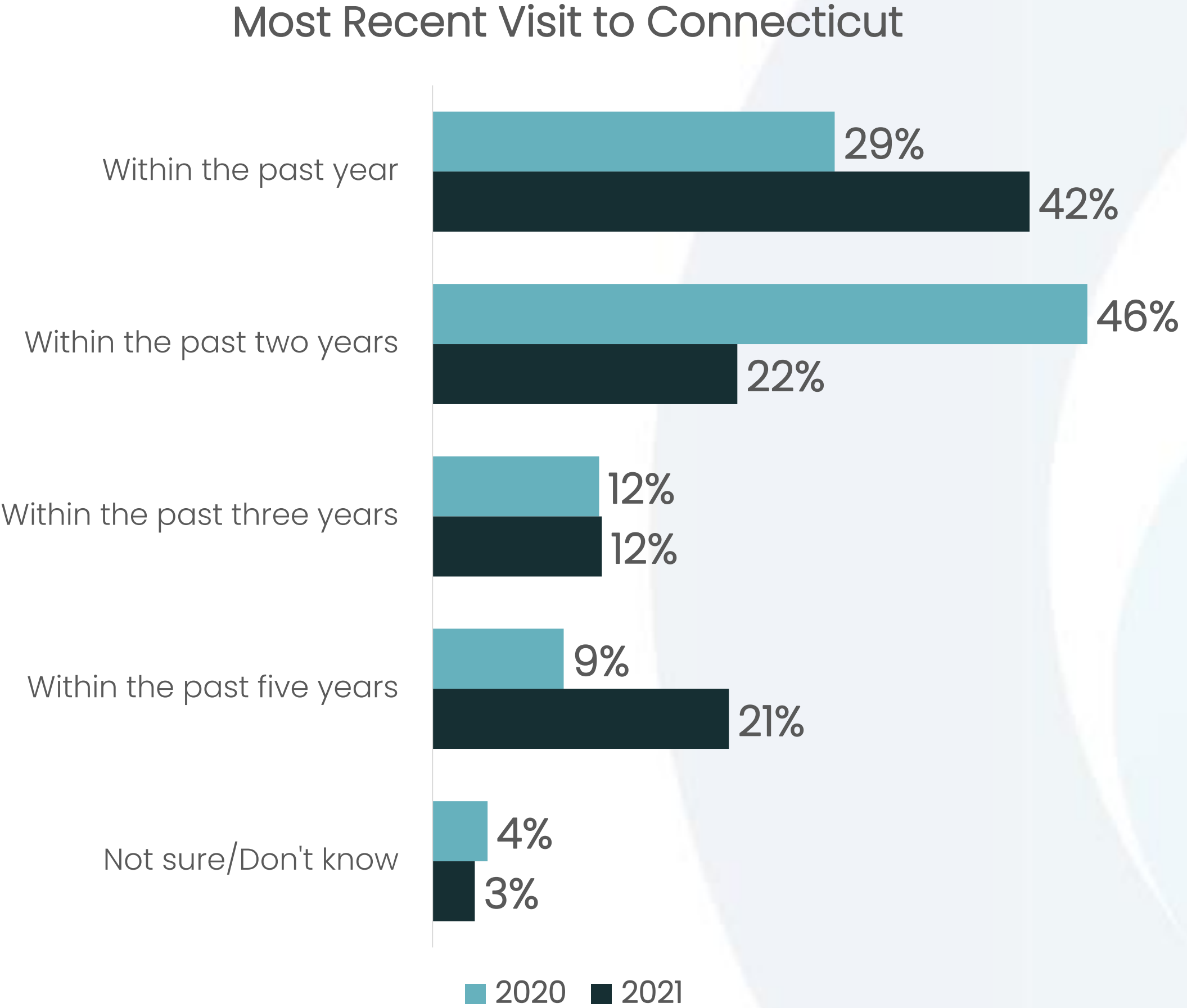
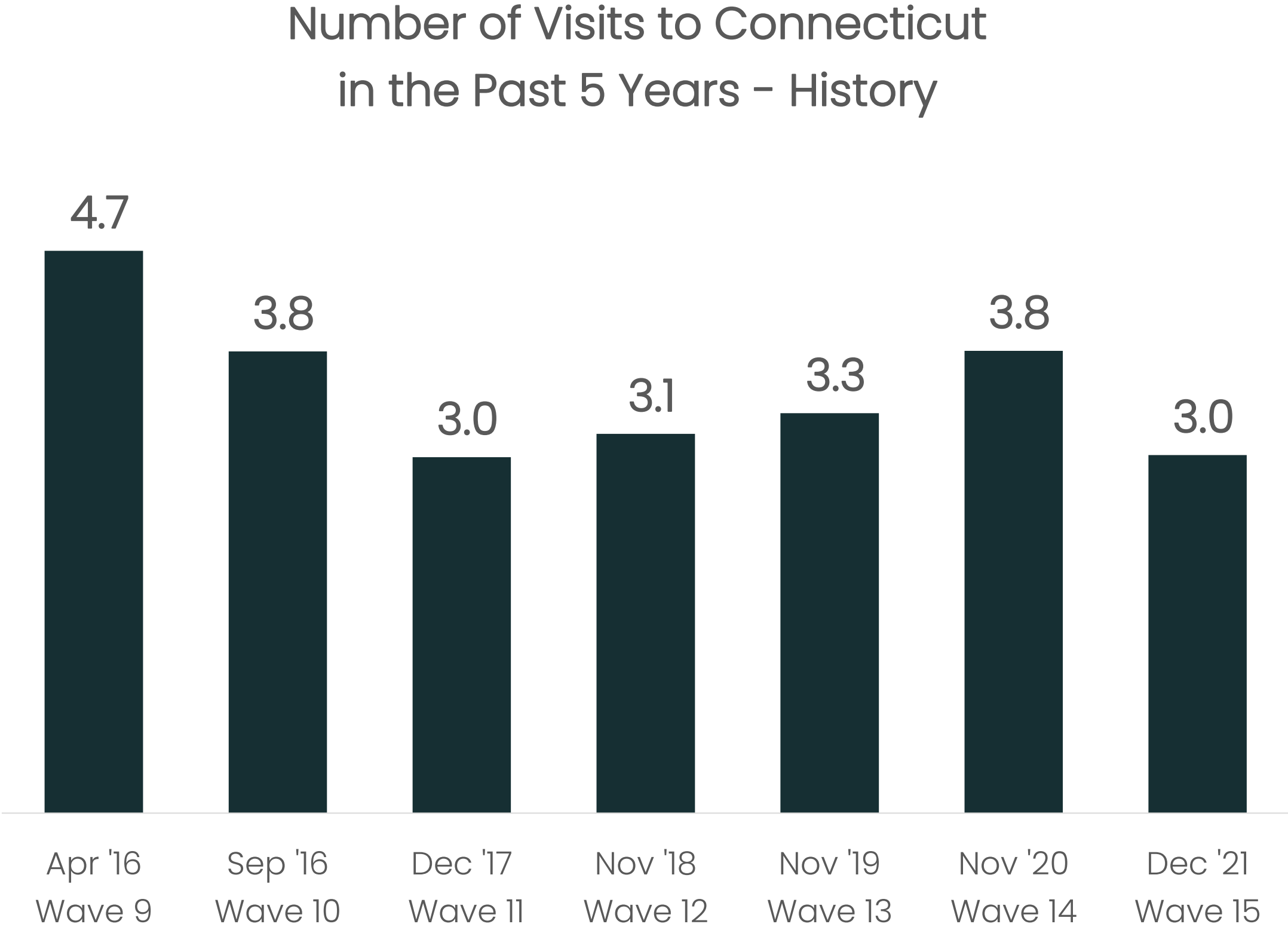


Q26: Did the marketing communications, online news stories or social media posts you saw or read make you think that Connecticut...?

Connecticut 2021 Brand Awareness Research

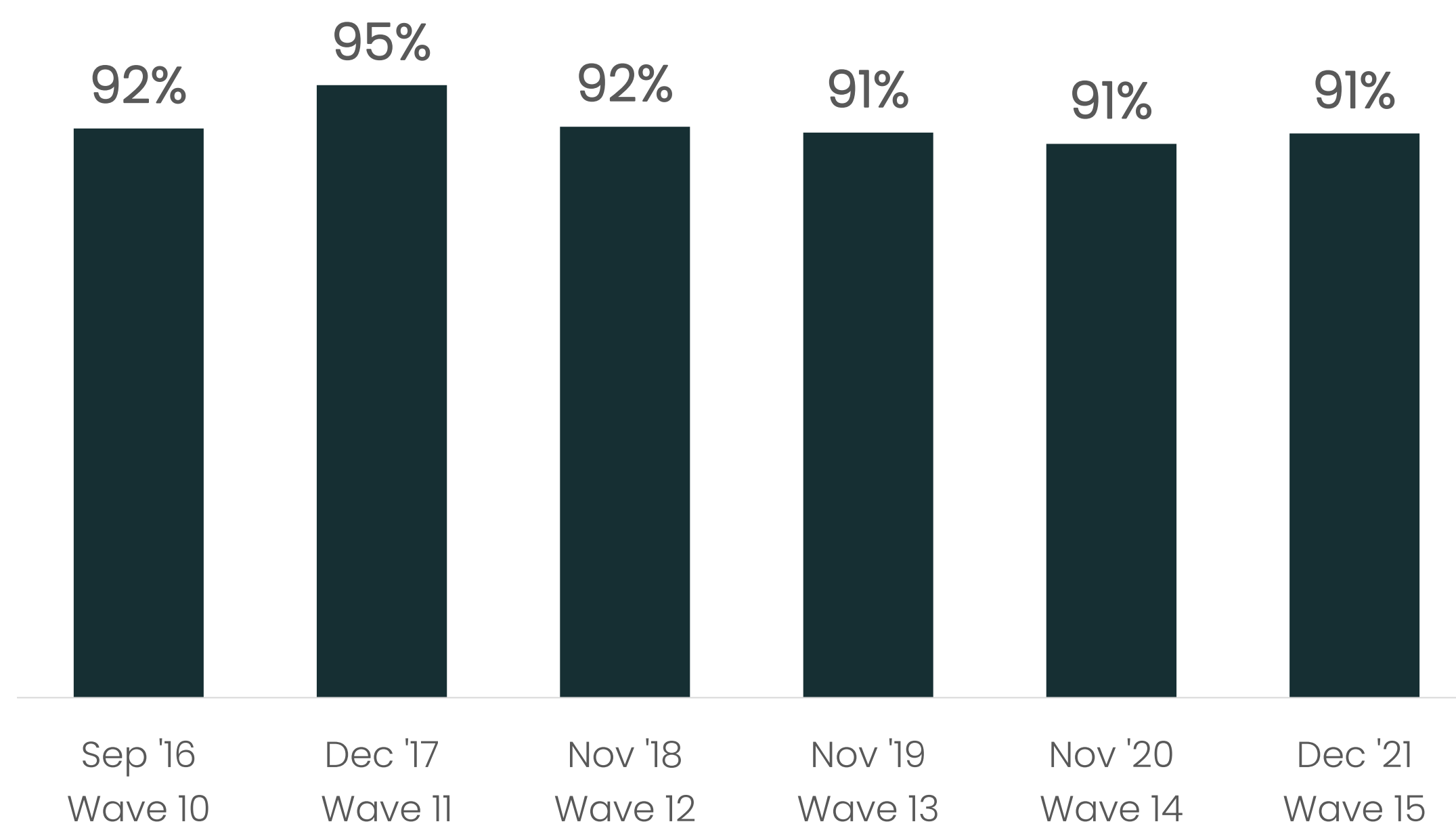
Connecticut Visitors

As travelers began venturing out in 2021, they were interested in visiting a variety of places they were not able to in 2020. As a result, Connecticut enjoyed a surge in the incidence of visits but a small decline in frequency.

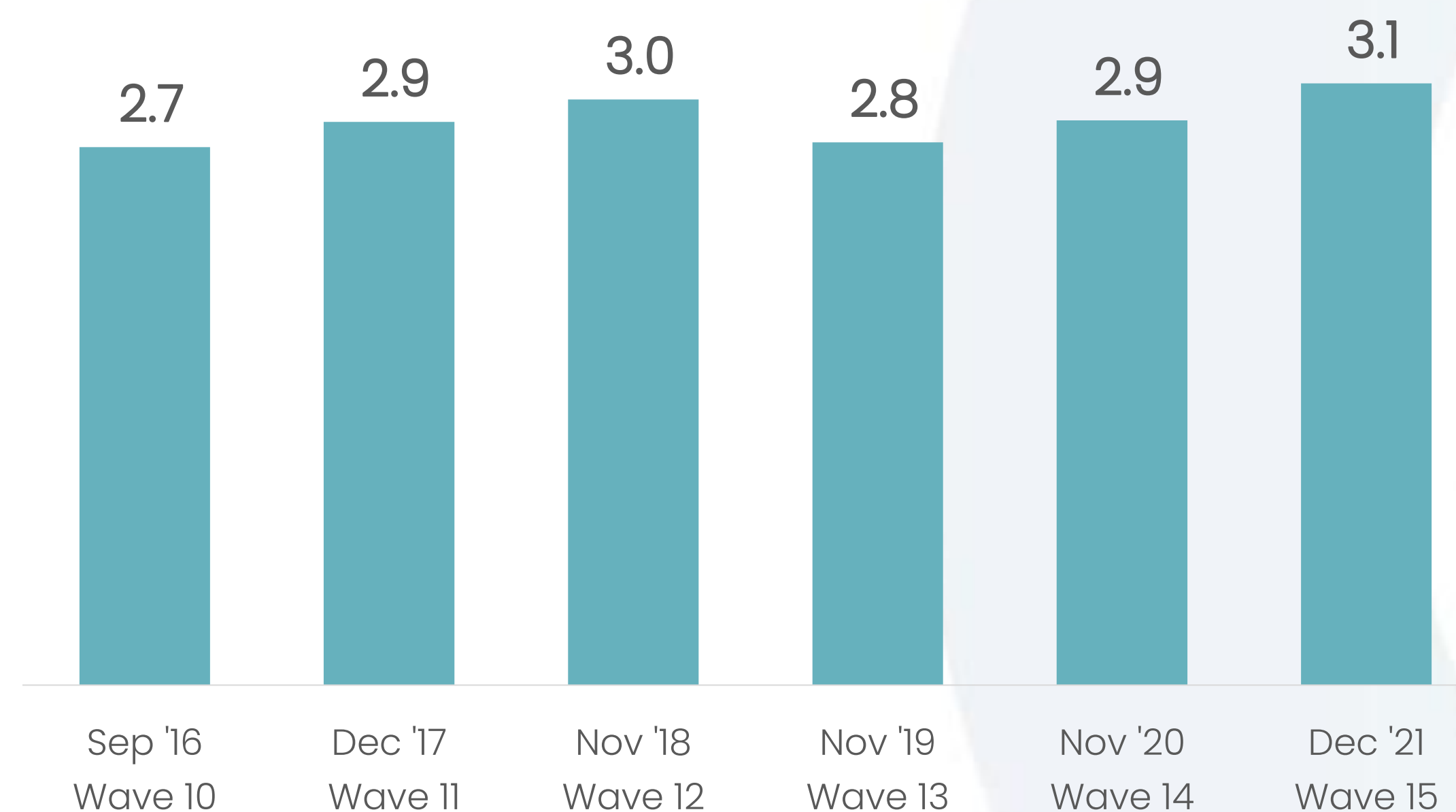


Similar to years past, most Connecticut travelers stayed overnight on their last trip – with most staying three + nights.

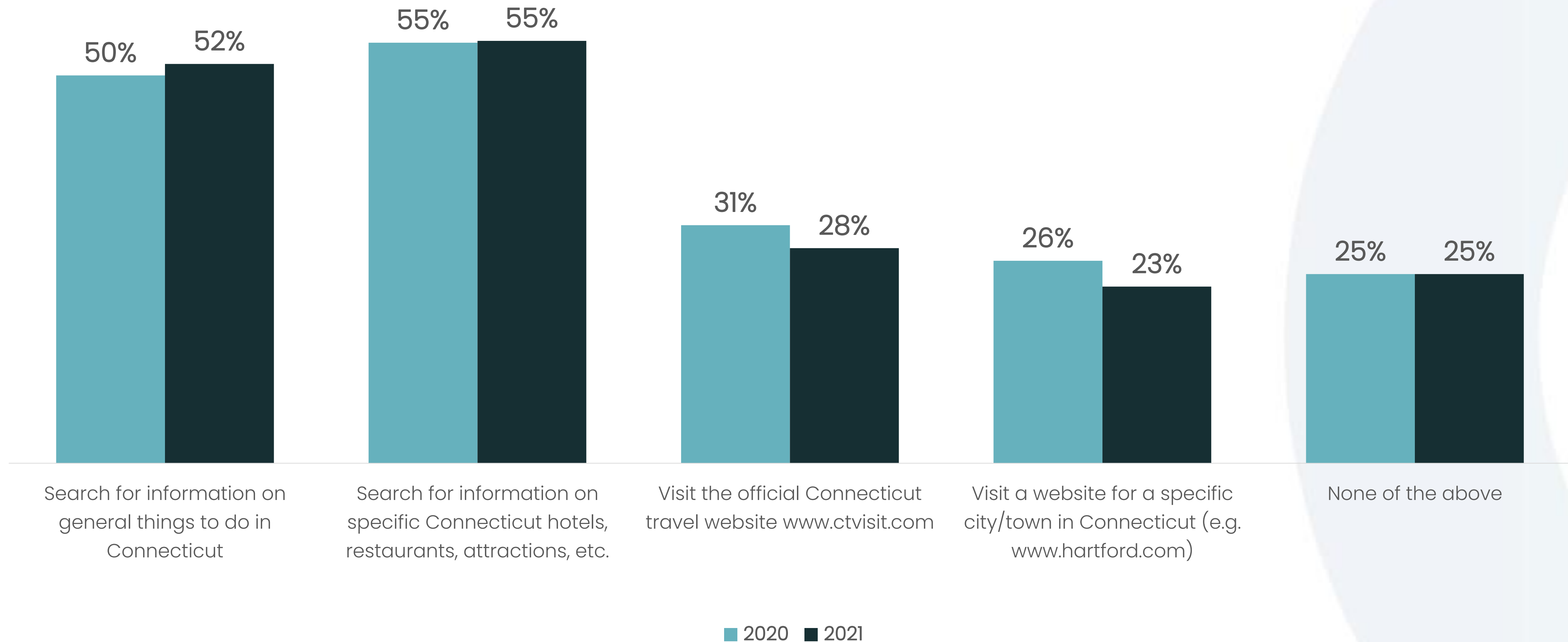
Overnight Visitation to Connecticut – History



Length of Stay – History



Visitors continue to search for information on Connecticut prior to visiting. They are most likely to search for hotels, restaurants, attractions, etc.



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=153

Visitor & Target Market Demographics

Visitors in 2021 had a comparatively high household income and were younger but visited a bit less often than the prior year.

Those who visited in 2021 were closer in income and age to the overall target market than pre-pandemic visitors and somewhat more ethnically diverse.

Similar trends have been noted across travelers nationwide.



Travel Insight

Those who traveled in 2021 tended to have a comparatively higher income, be younger and more ethnically diverse.

Category	2021 Visitors*	2020 Visitors*	Target Market Travelers*
Household Income	\$133.3k	\$137.4k	\$135.2k
Age of Respondent	41.0	47.7	40.6
25-34	32%	15%	27%
35-44	33%	50%	43%
55-64	35%	36%	30%
Interest in Visiting Next 2 Years	70%	72%	54%
Intent to Visit Next 12 Months	78%	87%	47%
Number of Visits Past 5 Years	4.1	6.8	3.0
White, Non-Hispanic	84%	87%	78%
Black, Non-Hispanic	2.6%	3.4%	6.8%
Hispanic	7.9%	4.1%	7.8%
Asian	7.2%	4.7%	5.9%
Other	2.0%	4.1%	4.3%

*All metrics from 2021 and 2020 come from Target Market Travelers and Visitors. Target Market Travelers/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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