

2023 Brand Perception & Health Research

Prepared for Connecticut Office of Tourism

Delivered January 2024

THE CLOSEST TO THE CUSTOMER WINS.



Project 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 2023 Brand Perception & Health Research was conducted in November and December of 2023 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. This year, there was also an oversample of 200 respondents who identify as LGBTQ+. With those included from the original sample a total of 249 fall into this category for a maximum margin of error of +/-6.2% at a 95% confidence interval. *Sample sizes less than 125 should only be used for directional purposes only.*

	N Size
Overall (All Travelers)	1,000
LGBTQ+	249
Visitors past 5 years	415
LGBTQ+ visitors past 5 years	95
Visitors past 2 years	321
LGBTQ+ visitors past 2 years	67

Key Takeaways

- **Pent-Up Demand Continued.** Pent-up demand caused by the pandemic resulted in a heightened desire to make up for lost time and experiences and not take travel for granted. Thus, the proverbial floodgates opened in 2023, and travelers increasingly sought out the types of long-haul, bucket-list destinations they had not been able to visit in recent years. Of course, “every action has an equal and opposite reaction.” As more area travelers traveled farther, fewer remained in the region. As a result, Connecticut and its competitive set in the Northeast all experienced some natural regression to the mean in 2023 as the travel landscape seeks to normalize.
- **Brand Health Remains Strong.** Aided brand awareness remained strong for Connecticut and across the region, but top-of-mind awareness remained low as travelers’ attention shifted to destinations farther away. Both interest and intent to visit Connecticut remain comparable to historic averages, but as expected, both slipped a bit compared to last year. The good news is, Connecticut’s conversion and retention rates posted strong results above both last year and the state’s historic averages.
- **Marketing Strongly Helped Slow Regional Travel Leakage.** Connecticut’s (COT)marketing efforts greatly helped slow the tide of long-haul trips headed outside of the region. The state’s Brand Characteristics, Descriptors and Business Characteristics delivered ratings well above Connecticut’s historic averages as did the delta in brand perception among ad aware and unaware travelers. Those reached by COT’s marketing efforts delivered higher brand ratings than those who had not seen any COT ads. However, decreased budgets did show negative impacts in many areas.

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02. Brand Health	Pages 16 - 24
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04. Visitor Profile	Pages 31 - 35
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01. Brand Perception

Overall | N=1,000; LGBTQ+ | N=249

02. Brand Health

03. Marketing Impact

04. Visitor Profile

05. Appendix



Resident State Pride

Connecticut residents' pride of their state increased slightly in 2023 and at 49% it remains well ahead of its historic benchmark (44%).

Relative to its competitive set, pride among Connecticut residents dipped from 5th place to 6th place in 2023.

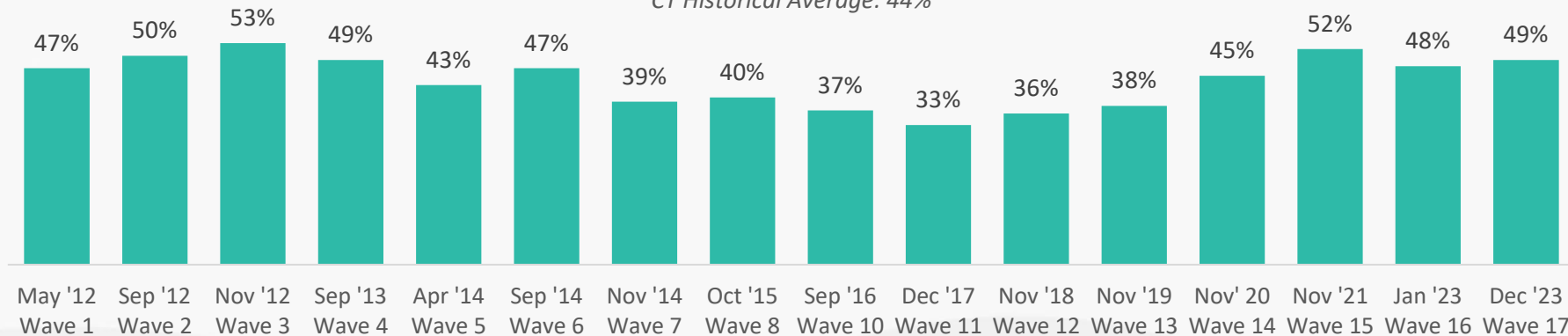
% Very/Extremely Proud to Be a Resident of Their State

Competitive Set Average: 62%



Connecticut State Pride History

CT Historical Average: 44%



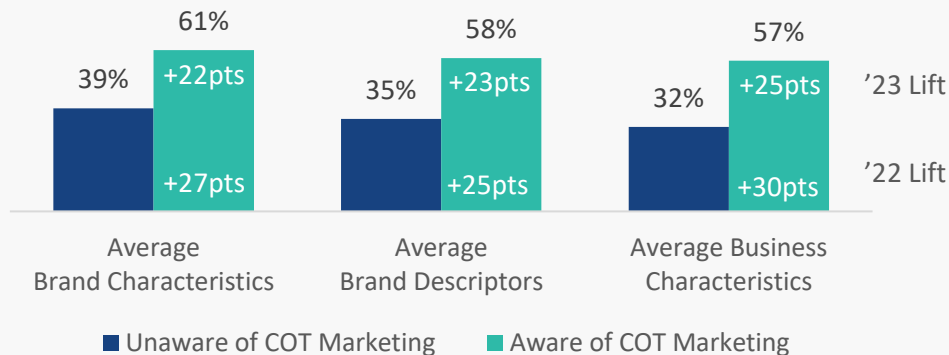
Connecticut Brand Ratings

Connecticut's marketing efforts continued to deliver positive lift between those reached by the state's marketing and those it did not reach. Connecticut's ratings for brand characteristics, descriptors and business characteristics continued to post much stronger results among marketing-aware audiences.

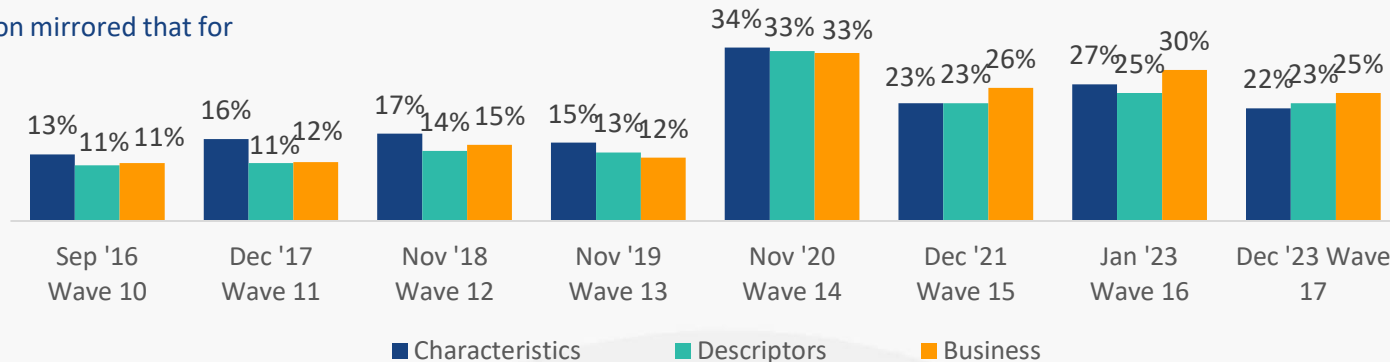
Yet, as expected, given the strong post-pandemic performance lift in 2022, Connecticut ratings did experience some regression toward the norm in 2023.

The lift for the LGBTQ+ population mirrored that for overall respondents.

LGBTQ+ Lift:
 Characteristics: +23pts
 Descriptors: +22pts
 Business: +23pts



Marketing Lift Impact History



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. 5-pt. scale
 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. 5-pt. scale
 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

Among all respondents, nine of the top ten perceptions of Connecticut remained consistent and continues to be led by the attributes Beautiful Fall Foliage, Beautiful Scenery and Interesting Small Towns. However, decreased budgets likely contributed to declines across many attributes.

Describes CT well/extremely well	2023	2022		2023	2022
Has beautiful fall foliage	74%	74%	Has great shopping	54%	57% ▼
Offers beautiful scenery	71%	70%	Is a fun destination	53%	54%
Has interesting small towns to explore	69%	68%	Offers great culinary experiences	53%	57% ▼
Offers a place to rest and relax	64%	64%	Good place for boating	53%	58% ▼
Offers a sense of history as part of the landscape	64%	64%	Offers a romantic escape	53%	56% ▼
Has lots of historic sites to visit	62%	63%	Has nice resorts/spas	52%	56% ▼
Is a good place for hiking/biking	61%	60%	Offers a good value for the money	49%	52% ▼
Offers great inns/B&Bs	61%	61%	Has vineyards/wineries	49%	54% ▼
Great place to spend time with spouse/significant other	59%	64% ▼	Offers "pick your own" farms	48%	50% ▼
Has winter activities	57%	58%	Offers arts and culture	47%	49% ▼
Offers casino entertainment	57%	56%	Good place for fishing	47%	53% ▼
Great place to spend time with friends	57%	61% ▼	Good place for golfing	44%	48% ▼
Has lots of things to see and do	57%	58%	Offers action/adventure sports (e.g., zip lining, rock climbing)	44%	46% ▼
Has friendly, welcoming people	55%	57% ▼	Has great beaches	43%	45% ▼
Has great antiquing	54%	56%	Has great theatre	37%	42% ▼
Great place to spend time with children	54%	55% ▼	Offers exciting nightlife	37%	45% ▼

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. 5-pt. scale

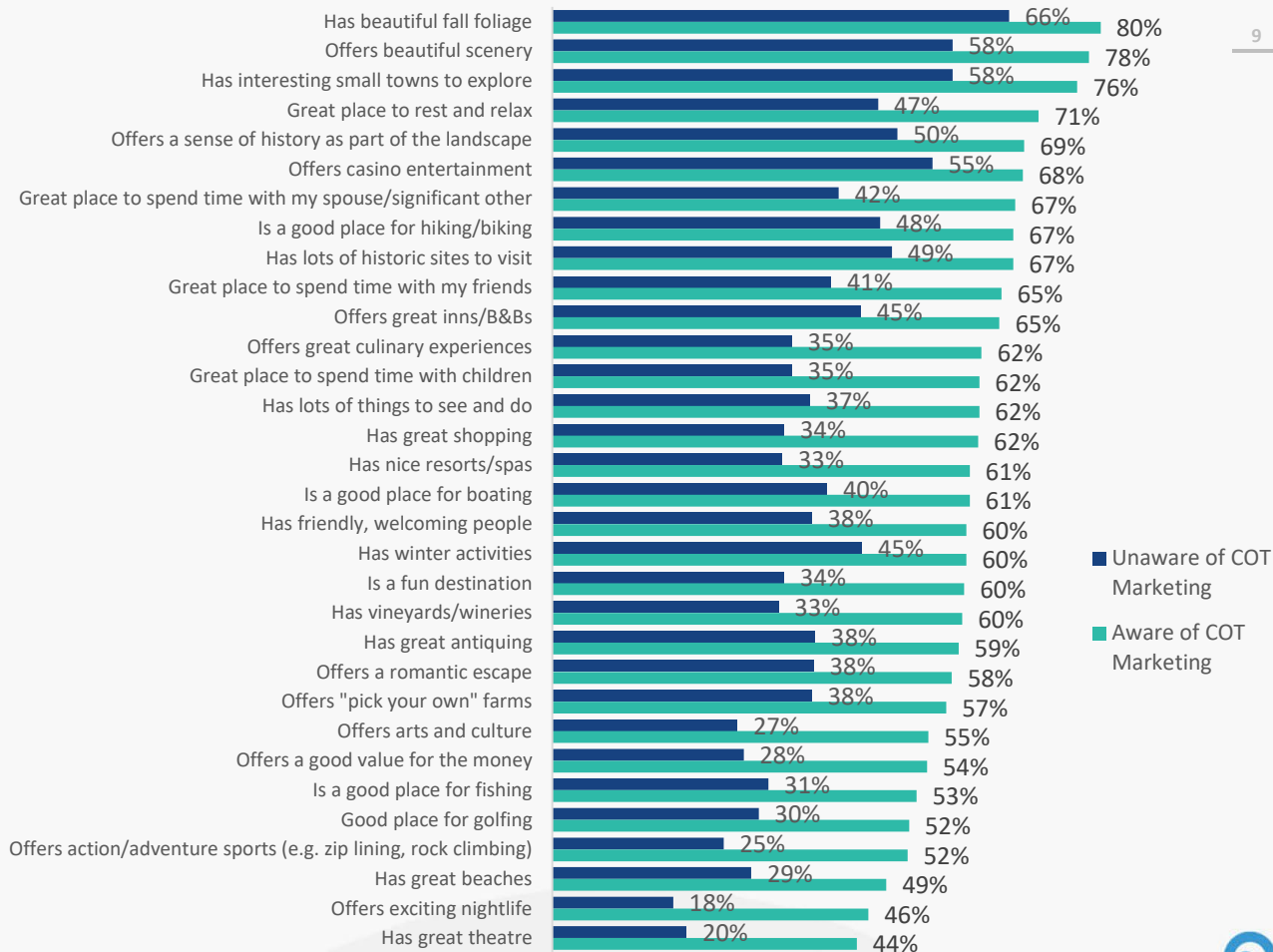
▲▼ Denotes a statistically significant variance to 2022 scores

Brand Characteristics

Travelers reached by Connecticut's marketing efforts have a much more positive view of the state than those who haven't seen or heard any COT marketing.

Every COT brand attribute measured this year exhibited a positive lift between those reached by the marketing vs those who were not reached.

The biggest variances in 2023 came in the perception of Connecticut as a place that offers exciting nightlife (+28.4 points), great shopping (+28.1 points) and arts and culture (+27.7 points).



Among all respondents, the words used to describe Connecticut continued to be Historical, Clean, Nature-Oriented and Traditional. Eight of the top ten top descriptors remained in a dead heat with 2022.

Describes CT well/extremely well	2023	2022		2023	2022
Historical	69%	67%	Fresh	49%	52% ▼
Clean	67%	66%	Vibrant	48%	48%
Nature-oriented	63%	62%	Affordable	47%	46%
Traditional	63%	65%	Contemporary	46%	51% ▼
Close by	63%	65%	Diverse	46%	47%
Quaint	62%	65% ▼	Artsy	46%	49% ▼
Upscale	62%	62%	Exciting	45%	49% ▼
Welcoming	59%	59%	Pretentious	45%	53% ▼
Friendly	58%	59%	Inspiring	45%	49% ▼
Authentic	57%	59% ▼	Revolutionary	44%	48% ▼
Fun	55%	57% ▼	Trendy	42%	45% ▼
Sophisticated	55%	57% ▼	Innovate	42%	47% ▼
Smart	53%	57% ▼	Bold	38%	43% ▼
Cultural	52%	56% ▼	Unexpected	34%	43% ▼
Down-to-earth	51%	52%			

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

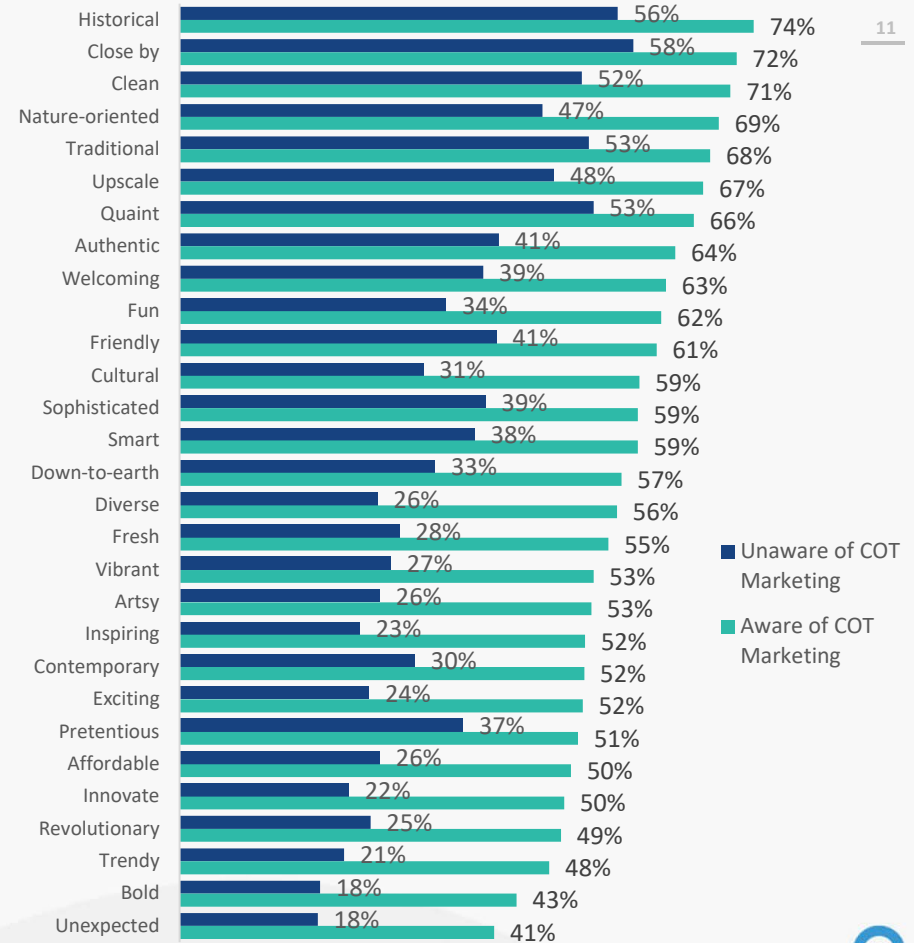
▲▼ Denotes a statistically significant variance to 2022 scores

Brand Descriptors

Connecticut's marketing also has a significant impact on how travelers describe Connecticut.

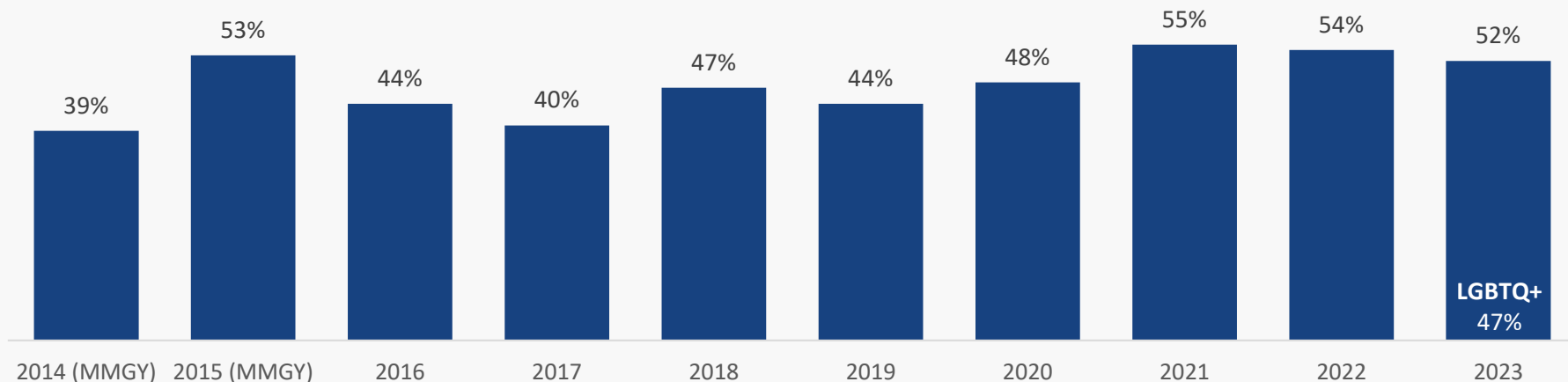
The brand descriptors average 58% for those aware of Connecticut's marketing compared to those unaware of Connecticut's marketing at only 35%, leaving a positive marketing lift of +23 points.

The largest variances between ad aware and ad unaware travelers in the target market came from the descriptors of being Diverse (+30.8 points), Inspiring (+29.0 points) and Cultural (+27.8 points)



The average score for Connecticut's brand descriptors (52%) slipped slightly from last year's post-pandemic high but remains well ahead of Connecticut's historic average (48%).

History of Brand Descriptors Average Score - % Describes CT Well/Extremely Well
CT Historical Average: 48%



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

The perception of Connecticut as a place to do business compared to both the state's overarching brand characteristics and descriptors has declined. While Connecticut still has an overwhelming positive perception as a place to do business, most of its primary business-related brand attributes declined in 2023.

Describes CT well/extremely well	2023	2022		2023	2022
A place with a good quality of life	63%	66% ▼	Friendly to businesses	49%	54% ▼
Has lots of educated people if you are hiring	61%	64% ▼	Great place for businesses to network	48%	54% ▼
Great place to have kids and raise a family	60%	64% ▼	Has lots of quality skilled labor if you are hiring	48%	52% ▼
Great place to live	57%	61% ▼	Place you can get things done quickly	46%	49% ▼
Progressive state	53%	56% ▼	State with lots of diversity	46%	48% ▼
Inclusive state	52%	54% ▼	Place of ingenuity	45%	49% ▼
Place with creative people	52%	56% ▼	Energetic state	45%	50% ▼
Great place to meet interesting people	52%	56% ▼	Great place for innovation	45%	51% ▼
Great place to work	50%	56% ▼	Dynamic, innovative state	44%	51% ▼
Place with innovative people	49%	55% ▼	Great place to relocate an existing business	44%	49% ▼
State with a lot of growth	49%	55% ▼	Great place to start up a business	43%	48% ▼

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

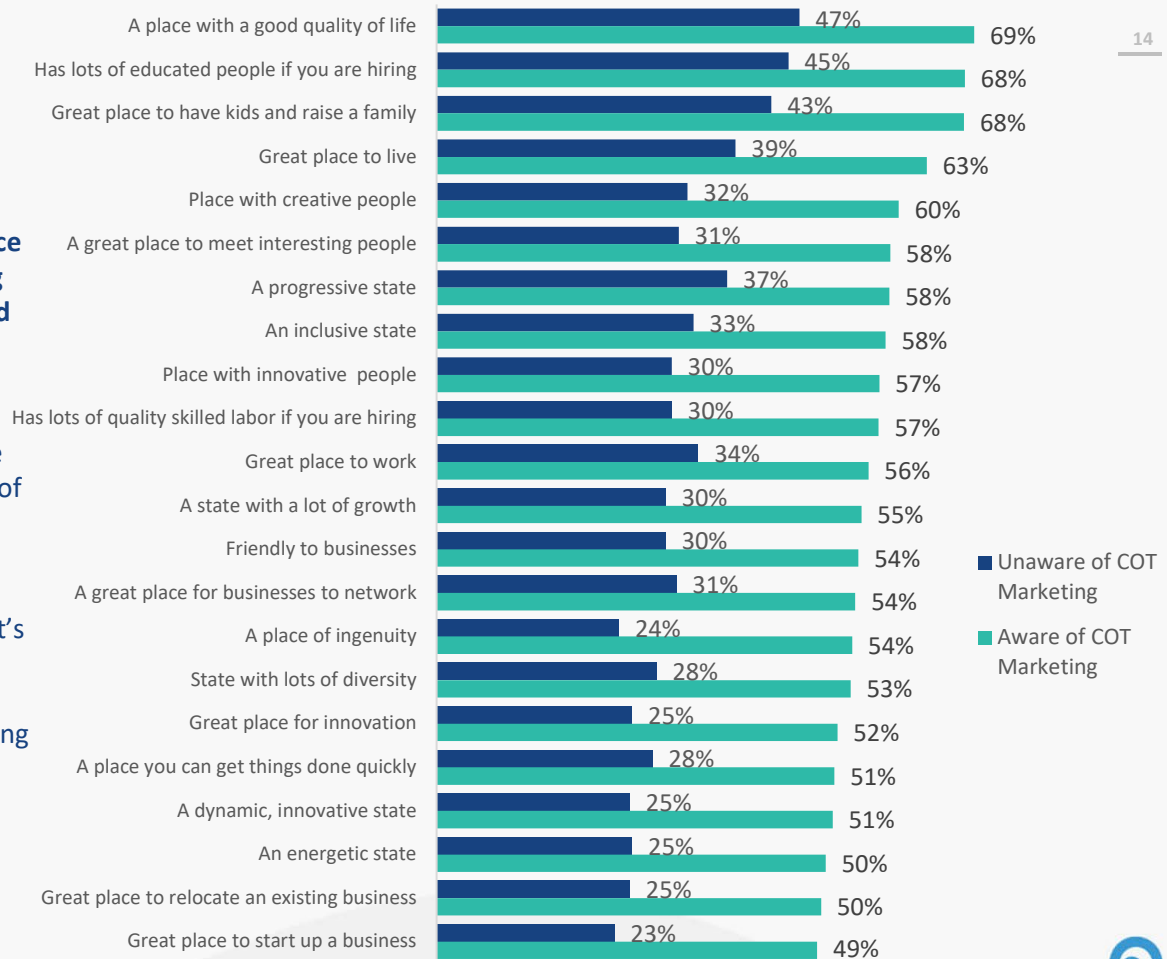
▲▼ Denotes a statistically significant variance to 2022 scores

Business Characteristics

Yet once again perception of Connecticut as a place to do business remains significantly higher among those aware of Connecticut's marketing compared to those unfamiliar with the state's marketing efforts.

Those who have seen Connecticut's marketing rate these business characteristics (57%) at an average of 25 points higher than those who have not seen the marketing (32%).

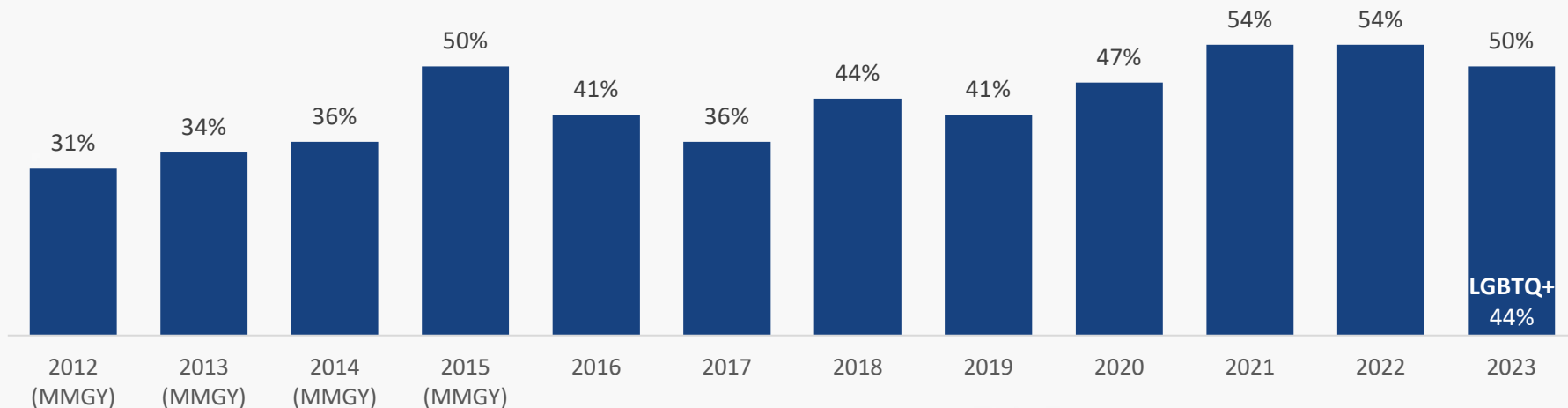
Regional travelers who are unaware of Connecticut's marketing are far less likely to view Connecticut as being a Place of Ingenuity (-30 points), and Place with Creative People/Great Place to Meet Interesting People (both at -27 points)



Despite a small shift in 2023, Connecticut's business brand characteristic (50%) remain well above the state's historic average (43%), up 19 points from 2012.

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

CT Historical Average: 43%



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

01. Brand Perception

02. Brand Health

Overall | N=1,000; LGBTQ+ | N=249

03. Marketing Impact

04. Visitor Profile

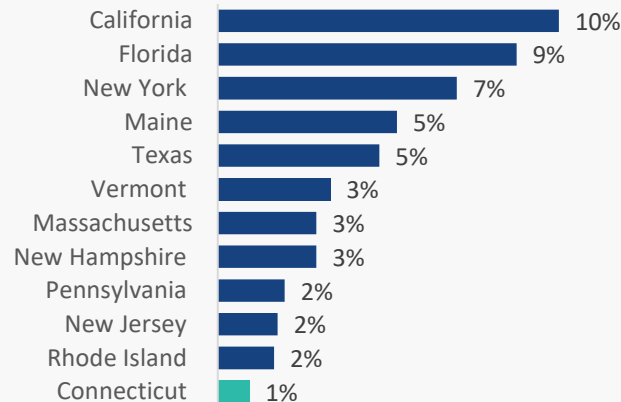
05. Appendix

Unaided Brand Awareness

Recent years have delivered a great deal of pent-up demand as travelers seek out the longer-haul destinations they had not been able to visit during the pandemic, and this has caused top-of-mind brand awareness among regional destinations like Connecticut to dip below average.

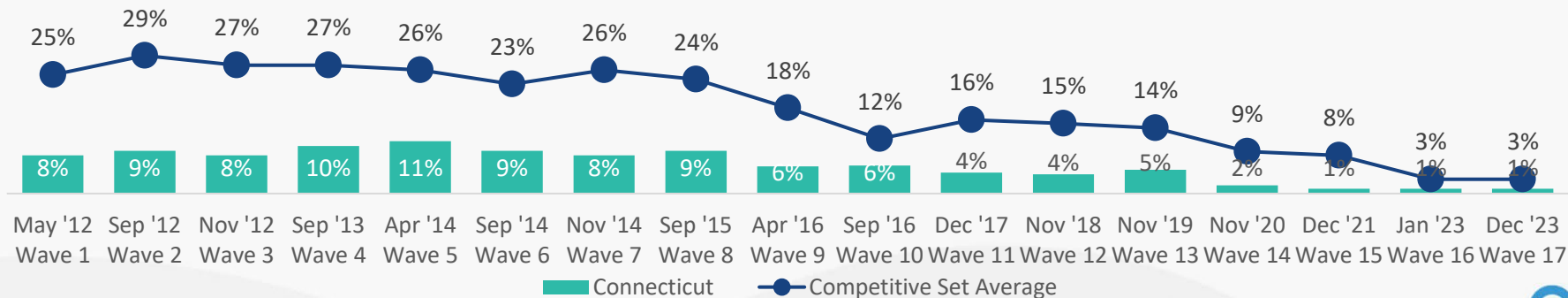
As a result, awareness among all of the states in Connecticut's comp set have remained historically low, as has Connecticut.

Unaided Brand Awareness – Competitive States



Unaided Brand Awareness History

CT Historical Average: 6%



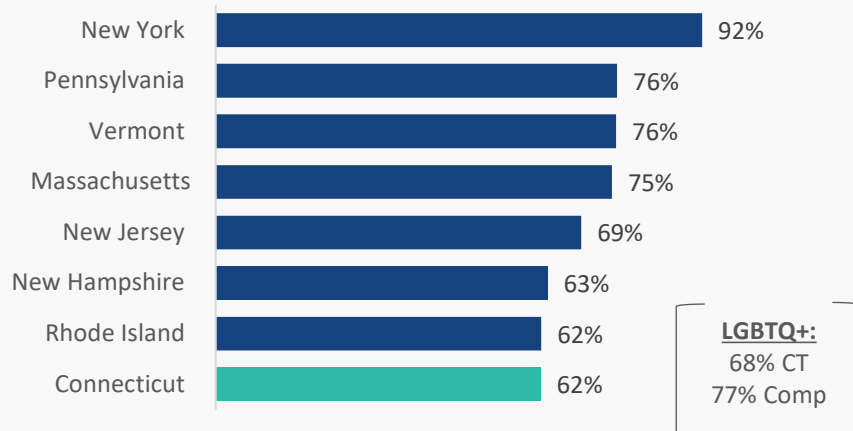
When you think about places to visit or travel to, please type the first STATE that comes to mind in the space below.
And what other STATES do you think of as places to visit or travel to?

Aided Brand Awareness

Despite comparative low top-of-mind awareness, aided brand awareness remains strong. More than 6 in 10 travelers (62%) in New England aged 25-64 are familiar with Connecticut as a place to visit, up 5 points from last year and well above the state's historic average (58%).

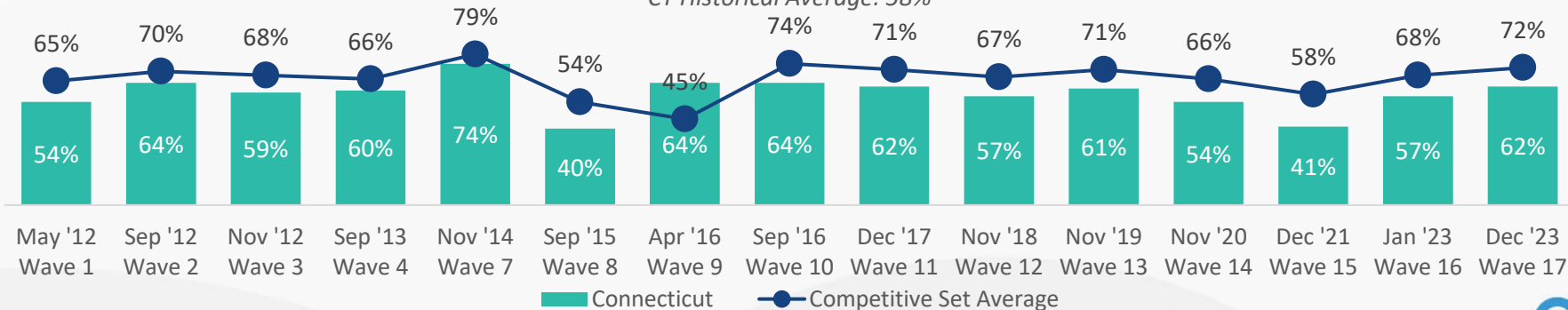
Despite Connecticut's strong performance in 2023, however, it remains in last place among the competitive set which averaged 72% this year.

Aided Brand Awareness – Competitive States



Aided Brand Awareness History

CT Historical Average: 58%



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?

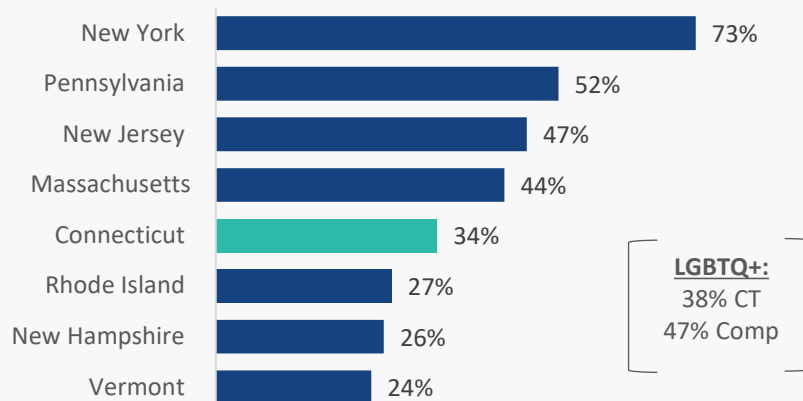
Visitation in the Past 5 Years

After falling during the pandemic years, Connecticut's market capture rate over the past 5 years has rebounded quite well. This past year, Connecticut reached 34%, its highest level since 2019.

This growth mirrors the rebound among the competitive set (41%) which also reached the highest level it has been since 2019. On average, however, Connecticut's market capture rate improved by 4 points in 2023 compared to its competitors which improved by just 2-points over 2022.

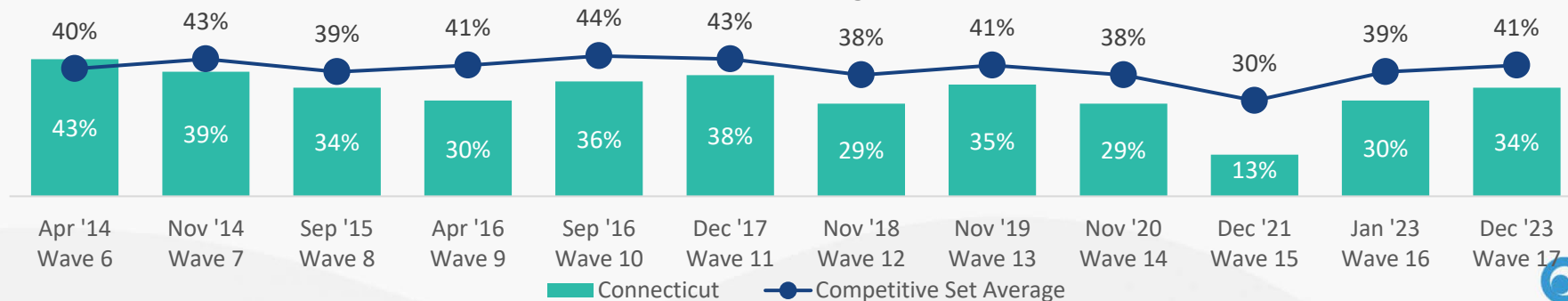
And, once again, COT's market capture among LGBTQ+ (38%) was slightly higher than the overall population (34%).

Visitation – Competitive States



Connecticut Visitation History

CT Historical Average: 33%



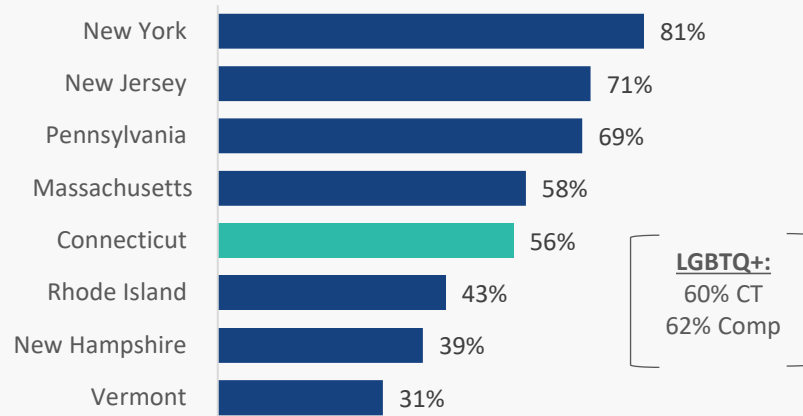
Conversion Rate

Connecticut converted 56% of its target market in 2023, up 2 points from last year.

Meanwhile, Connecticut's competitive set also converted 56%, on average, but this figure is 2-points lower than last year.

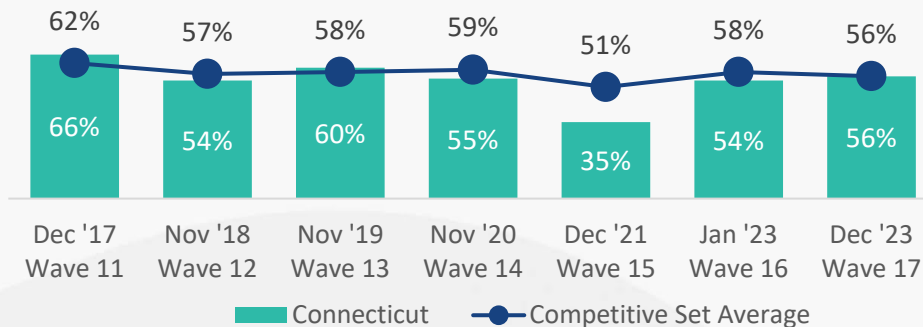
And similar to the market capture rate, conversion among the LGBTQ+ audience reached 60% in 2023, 2 points higher than the general population (56%).

Conversion Rates – Competitive States



Conversion Rates History

CT Historical Average: 54%



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

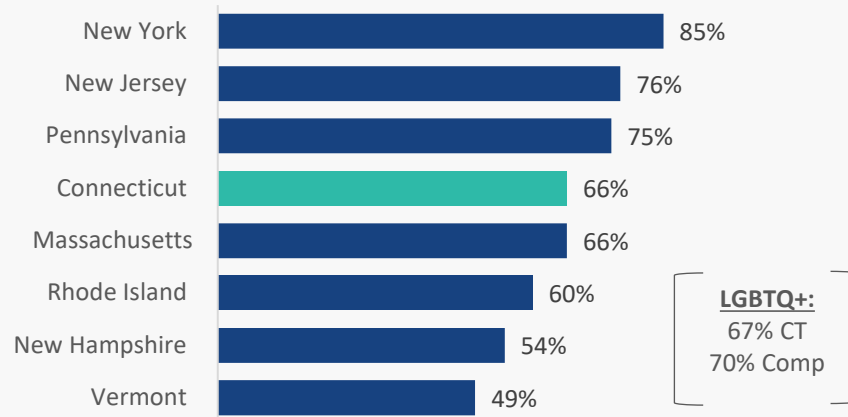
Retention Rate

Connecticut holds on to past travelers even better than it converts travelers. In 2023, the state earned a retention rate of 66%, up 1 point from last year.

Additionally, Connecticut's 66% retention rate for 2023 (66%) was on par with the competitive set's average, also at 66% which is tied for 4th place.

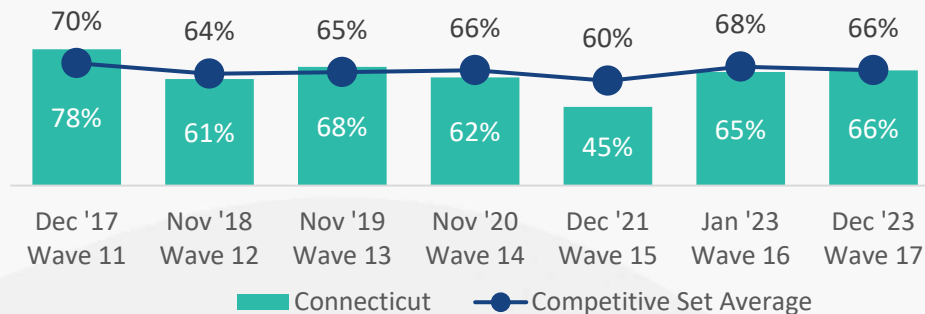
Among the LGBTQ+ audience, Connecticut's retention rate (67%) was slightly above average in Connecticut but slightly below average compared to the competitive set, 70% vs 66%.

Retention Rates – Competitive States



Retention Rates History

CT Historical Average: 64%

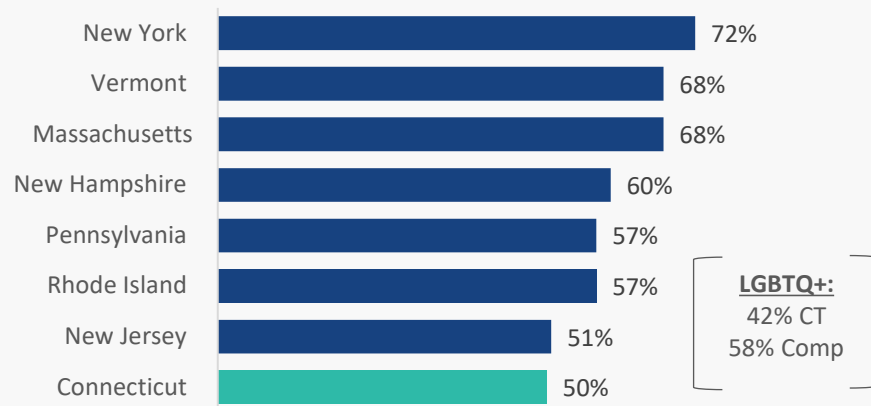


Interest in Visiting

Interest in visiting Connecticut remained strong at 50% this year, similar to its historic average. Although, interest did dip 3 points below last year as the desire for revenge travel continued. The lower budget and travel trends likely influenced the decline.

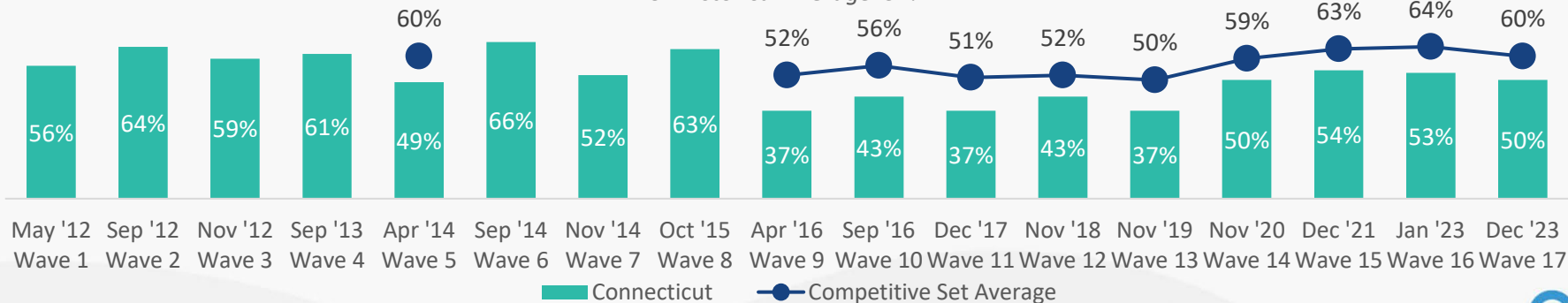
Connecticut's comp set also saw its overarching level of interest dip this past year, falling from 64% in 2022 to 60% in 2023.

Interest in Visiting – Competitive States



Interest in Visiting History

CT Historical Average: 51%



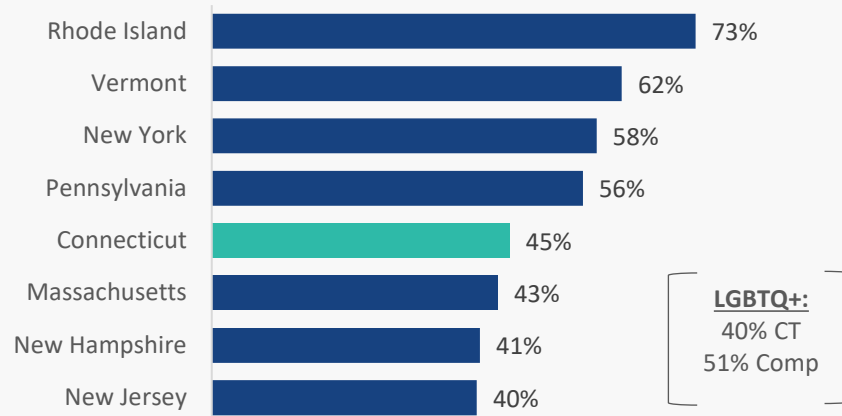
Intent to Visit in 2024

Intent to visit Connecticut (45%) remained even with its historic average in 2023, which is good considering the budgetary restraints. Marketing is key to keeping Connecticut top of mind.

Similar to interest, intent to visit both Connecticut and the regional competitive set as a whole, both decreased this past year. Intent to visit the competitive set averaged 52%, down from 56% in 2022.

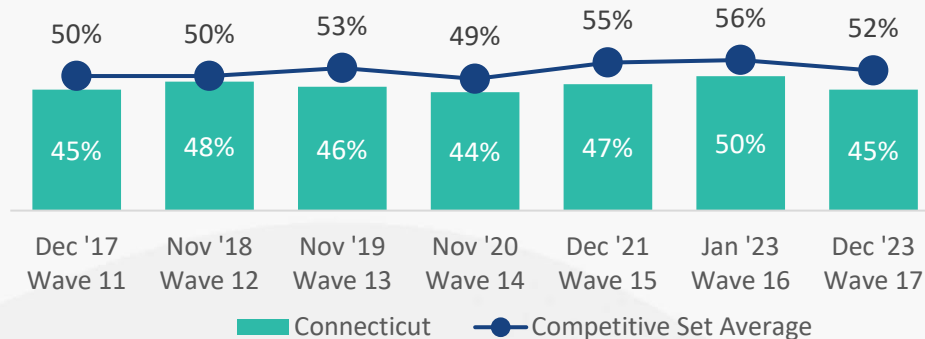
Interestingly, intent to visit Connecticut among the LGBTQ+ audience (40%) averaged 5 points lower than the gen pop audience in general (45%). Likewise, LGBTQ+ intent to visit states in Connecticut's comp set (51%) also trailed that of the general population (52%).

Intent to Visit in 2024 – Competitive States



Intent to Visit in the Next 12 Months History

CT Historical Average: 46%



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

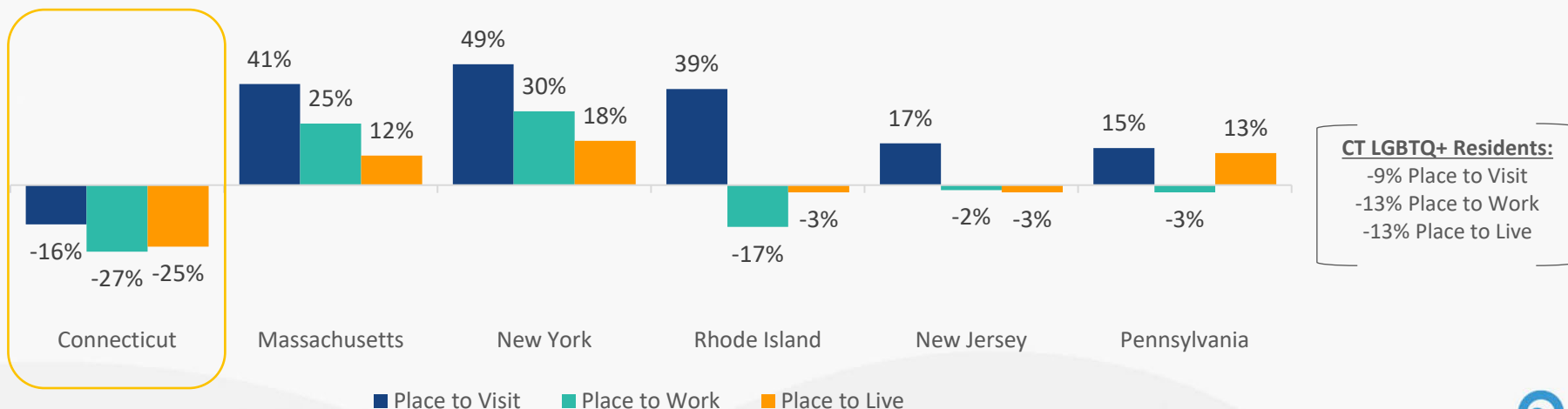
Intent to Recommend

This year a series of Net Promoter Scores (NPS) were added to the survey. Overall, 51% indicated they would be likely to recommend Connecticut as a Place to Visit, 42% would recommend it as a Place to Work and 39% would recommend it as a Place to Live.

However, like all NPS metrics, official NPS scores deduct Detractors from the ratio of Promoters to arrive at the NET promoter score. And the chart below visualizes these results for Connecticut and every other state in the competitive set.

Overall, Connecticut has more Detractors than Promoters in each category: -16% as Place to Visit, -27% as Place to Work and -25% as a Place to Live.

Intent to Recommend Your State As A...



Using the scale provided, how likely are you to recommend your state to your friends/family on each of the following? 11-pt. scale

01. Brand Perception

02. Brand Health

03. Marketing Impact

04. Visitor Profile

05. Appendix

ALL RESPONDENTS/TRAVELERS | N=1,000; LGBTQ+ | N=249

ALL RESPONDENTS/TRAVELERS AWARE | N=647
ALL RESPONDENTS/TRAVELERS UNAWARE | N=353

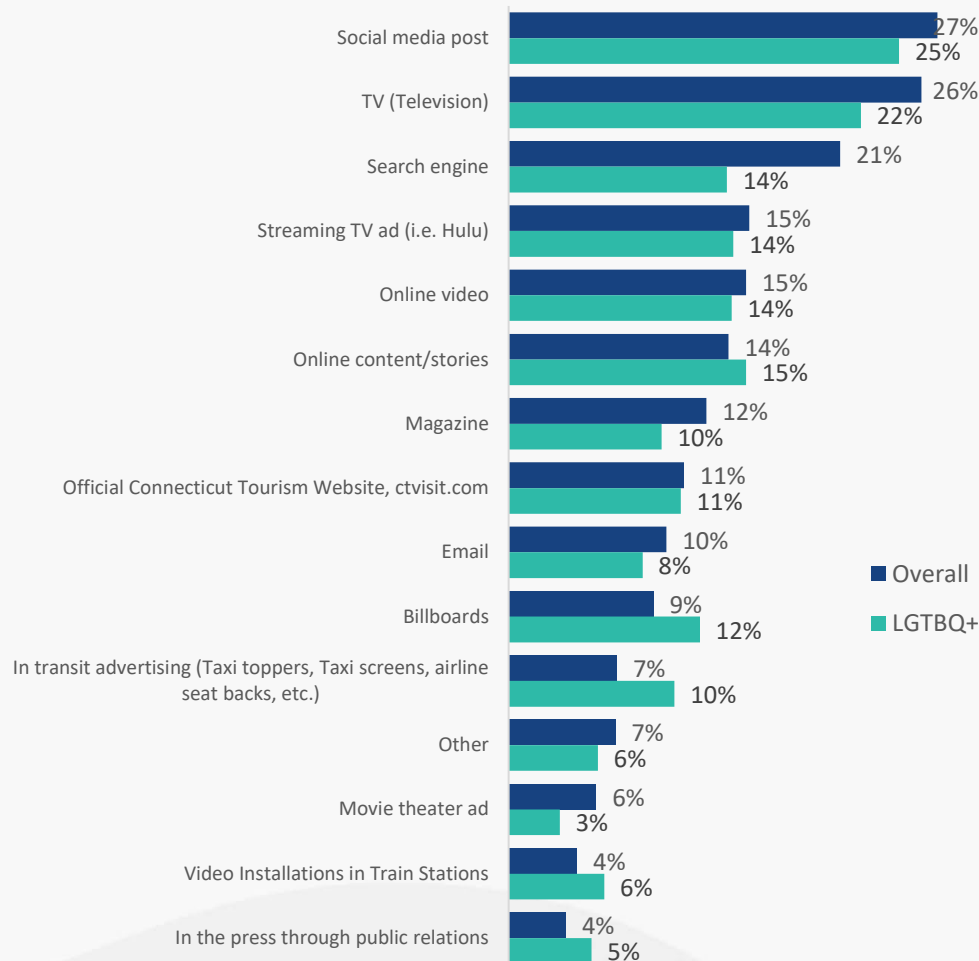
LQBTQ+ AWARE | N=150
LQBTQ+ UNAWARE | N=99

Marketing Awareness: LGBTQ+ vs Overall

Nearly two-thirds (65%) of New England travelers recalled seeing Connecticut marketing efforts. The most common types of marketing recalled were social media posts, on television or from their search engine efforts.

LGBTQ+ audiences (60%) were slightly less likely than the general population to recall seeing at least one of Connecticut's marketing communications.

The LGBTQ+ audience is more likely to recall having seen In-Transit Advertising, Video Installations at Train Stations, Billboards, and Online Content--and less likely to have seen marketing in Social Media posts, Television, Search Engines, Streaming TV Ads, etc.



Interest & Intent

Aware vs Unaware of CT Marketing

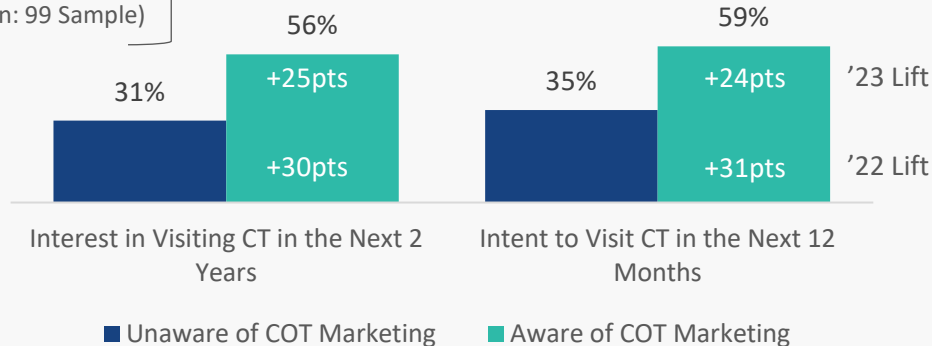
Once again, Connecticut's marketing efforts not only impacted traveler perceptions of the state as a travel destination but have also increased both interest and intent to visit Connecticut in the next 12 months.

In 2023, travelers reached by Connecticut's marketing efforts indicated they were 25 points more interested in visiting than those who hadn't seen any of the state's marketing efforts. And, those who had seen the marketing were also 24 points more likely visit Connecticut in the next 12 months.

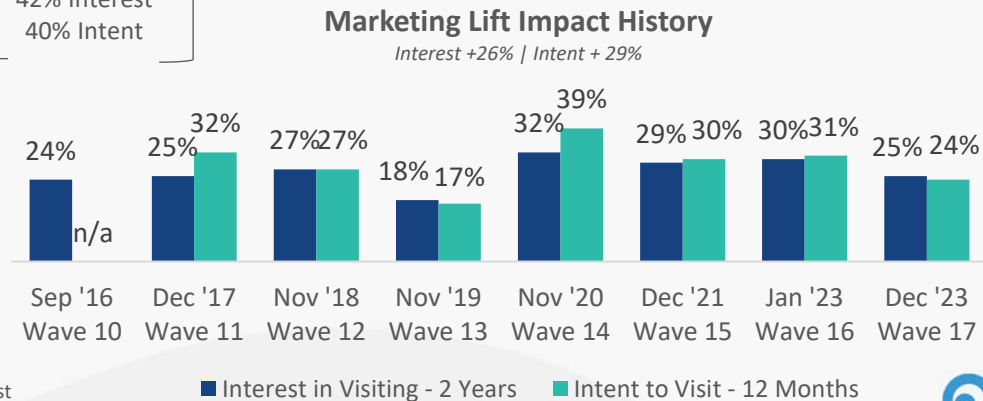
As shown in the second (bottom) graphic to the right, marketing continues to have a remarkably positive impact on both interest and intent to visit Connecticut.

Both interest and intent were slightly lower for the 249 LGBTQ+ respondents.

LGBTQ+:
+21pts Interest
+24pts Intent
(Caution: 99 Sample)



LGBTQ+:
42% Interest
40% Intent



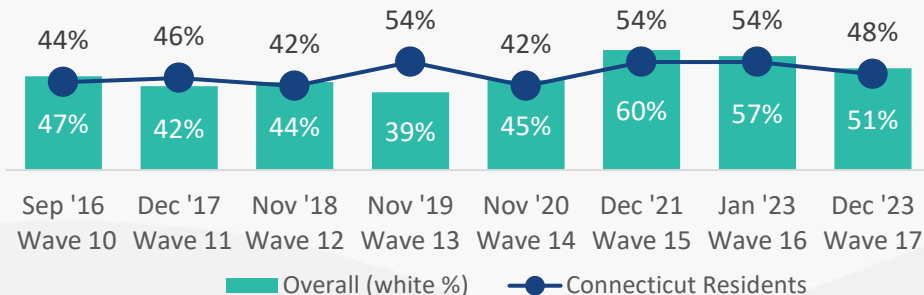
How interested would you say you are in visiting each of the following destinations for a Northeast getaway during the next two years? Please use a scale from 1 to 5 where 1 is "not interested at all" and 5 is "extremely interested." 5-pt. scale Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months. 5-pt. scale

Actions Likely to Take After Seeing Ads

Connecticut's marketing reached most regional travelers, and the impact of those marketing efforts had a positive impact on the state's brand perception and made prospects more likely to visit Connecticut. The most prominent actions travelers indicated they are most likely to take from seeing those marketing efforts include doing some research on Connecticut and/or planning to visit.

Overall, more than half (51%) of travelers indicated they would take at least one of these actions. Of course, when asked directly, many people are unlikely to say they were consciously impacted by marketing. This is why the key indicators of interest, intent, awareness and perceptions are important to measure among those both aware and unaware of advertising.

History – Took At Least One Action



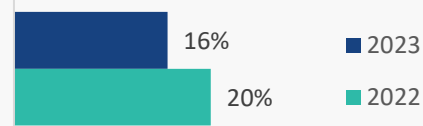
I looked into, or did some research, on visiting Connecticut after seeing or hearing an ad



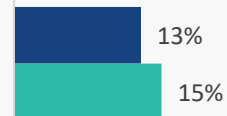
I am planning to visit Connecticut in the next year as a result of seeing or hearing an ad



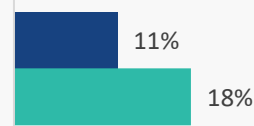
I specifically visited the Connecticut website (or ctvisit.com) after seeing or hearing an ad to find out more about the state



I 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



LGBTQ+:

37% - Took At Least 1 Action
+15pts - Lift in At Least 1 Action
(Caution: 23 Sample)

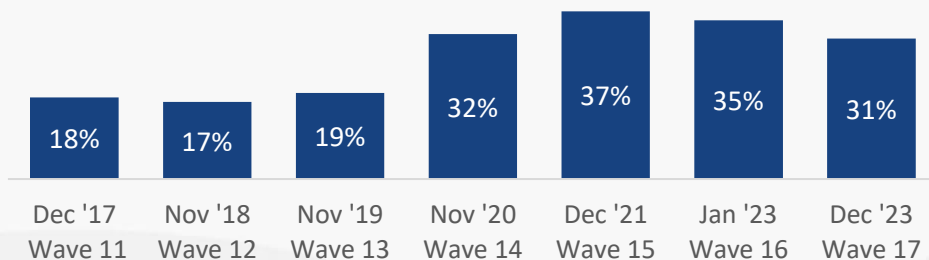
Marketing Communications

Travelers who were reached by Connecticut's marketing efforts in 2023 were also significantly more likely to view Connecticut as a great place for a short getaway, a place worth visiting in the future and a great place to spend time with my spouse/significant other.

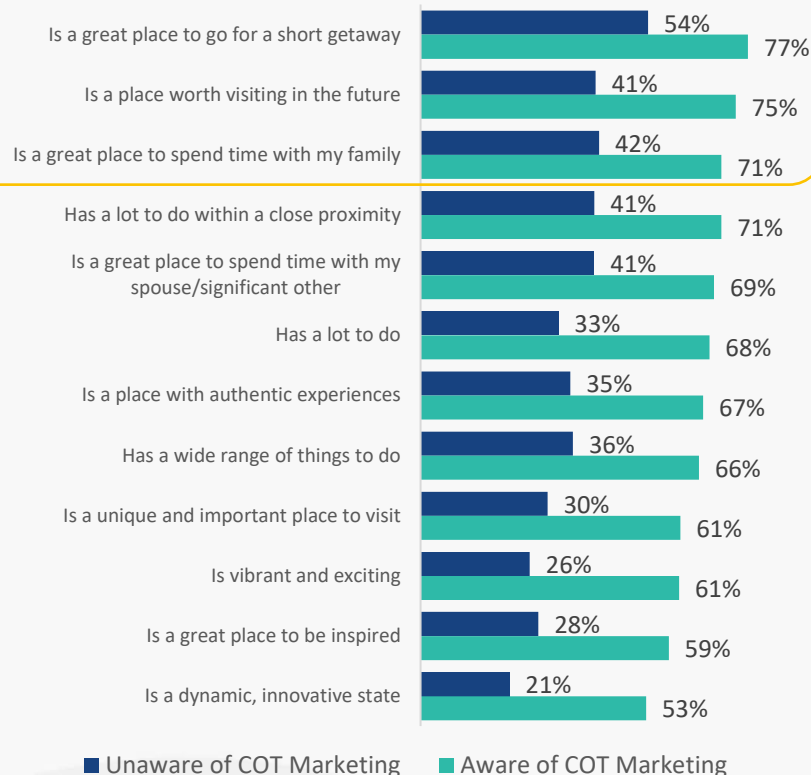
Every marketing takeaway associated with the state of Connecticut scored higher among those reached by the marketing for the state. On average, the lift in 2023 was +31 points which is well ahead of the historic norm of +27 points.

Average Ad Communications Lift History

Historic Average 27%



% Agree/Strongly with Statements After Seeing Marketing



■ Unaware of COT Marketing

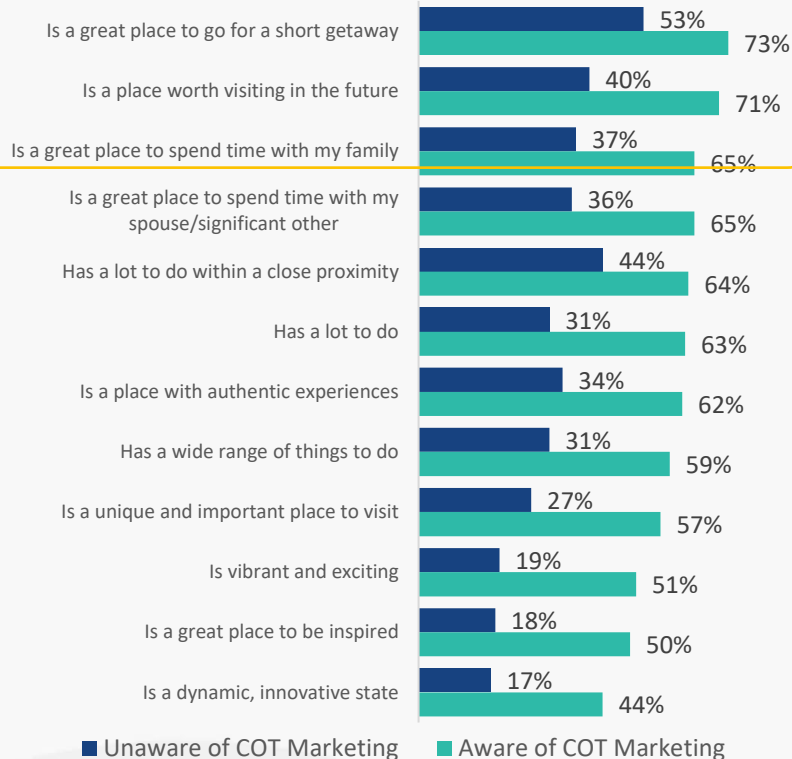
■ Aware of COT Marketing

LGBTQ+ Marketing Communications

LGBTQ+ Travelers who saw the state's marketing efforts had feelings that mirrored the general population. Most of those in the LGBTQ+ audience also feel that Connecticut is a great place to spend time with my family, is a place worth visiting in the future and is a great place to spend time with my spouse/significant other.

And similar to the gen pop audience, the LGBTQ+ community reached by Connecticut's marketing efforts also exhibited much stronger and more positive perceptions of the state across every key message point generating an average lift of +27 points in 2023.

% Agree/Strongly with Statements After Seeing Marketing



01. Brand Perception

02. Brand Health

03. Marketing Impact

04. Visitor Profile

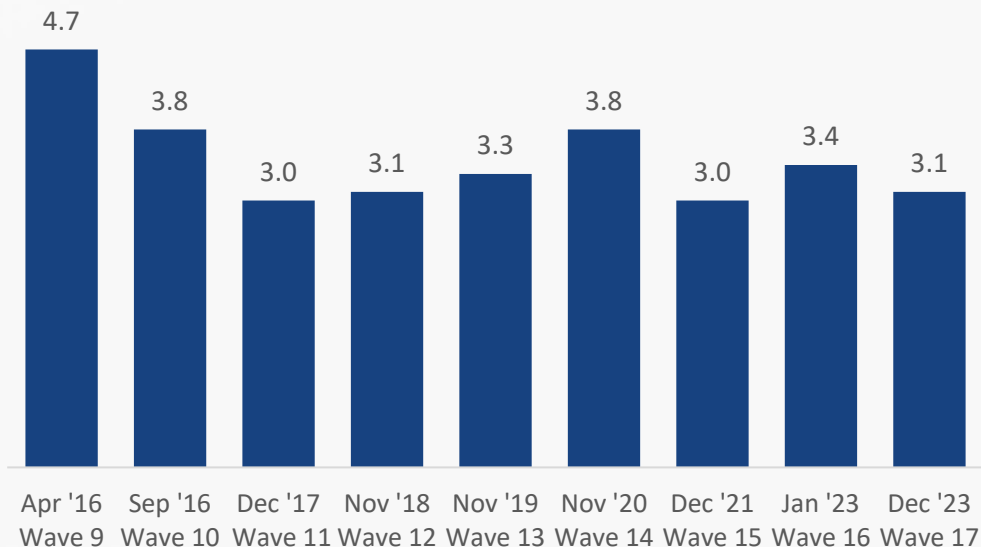
05. Appendix

ALL RESPONDENTS WHO VISITED CONNECTICUT IN THE PAST
5 YEARS | N=415; LGBTQ+ | N=95

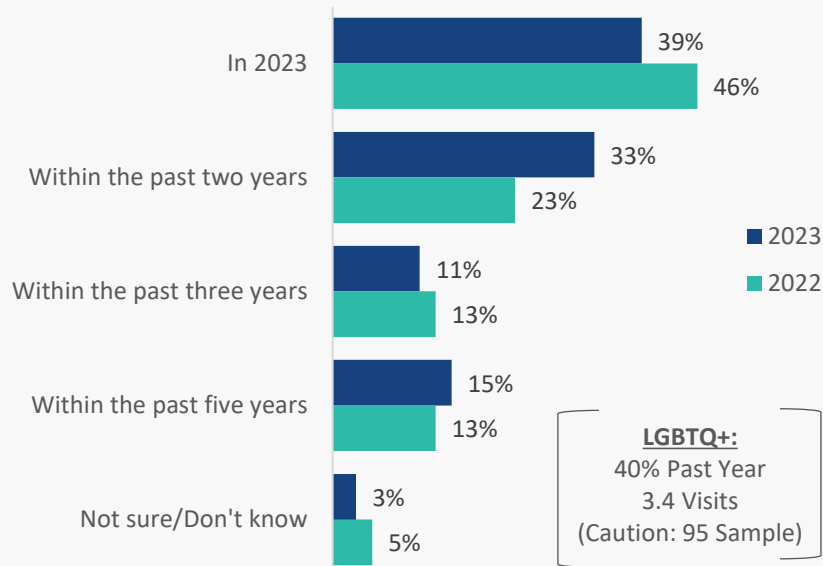
ALL RESPONDENTS WHO VISITED CONNECTICUT IN THE PAST
2 YEARS | N=321; LGBTQ+ | N=67

Of those travelers who have visited Connecticut in the past 5 years, nearly four in ten (39%) last visited in 2023 and have visited an average of 3.1 times.

Number of Visits to Connecticut
In the Past 5 Years



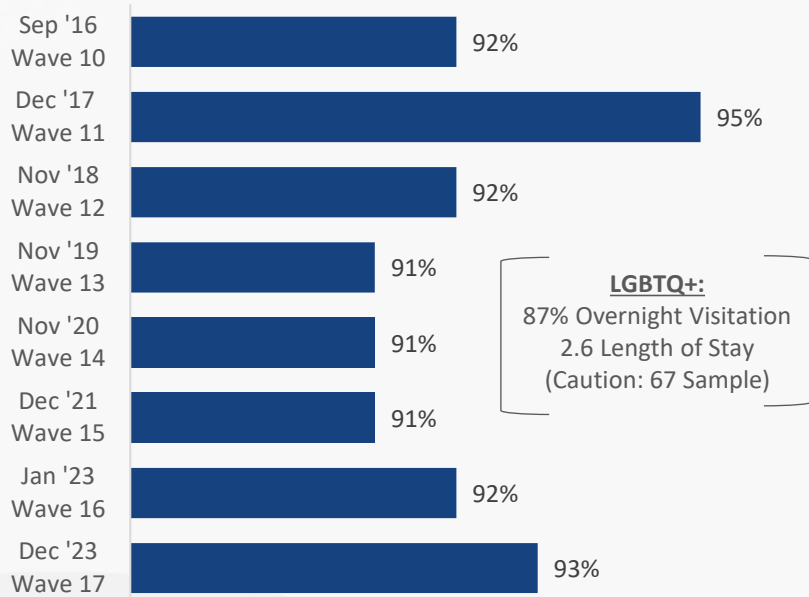
Most Recent Visit to Connecticut



LGBTQ+:
40% Past Year
3.4 Visits
(Caution: 95 Sample)

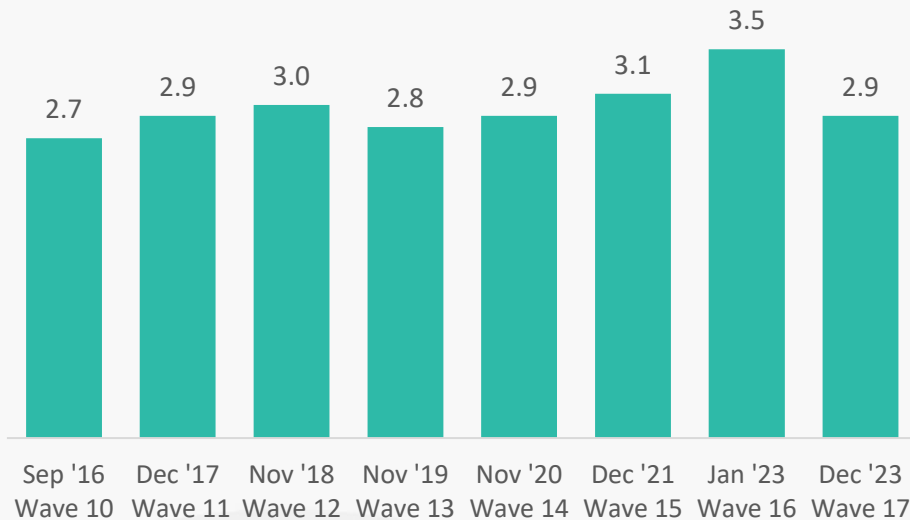
Connecticut travelers (within the past 2 years) are slightly more likely to have spent the night in the state in 2023, length of stay (2.9 nights) among these overnight visitors was on par with Connecticut's historic average.

Overnight Visitation to Connecticut - History

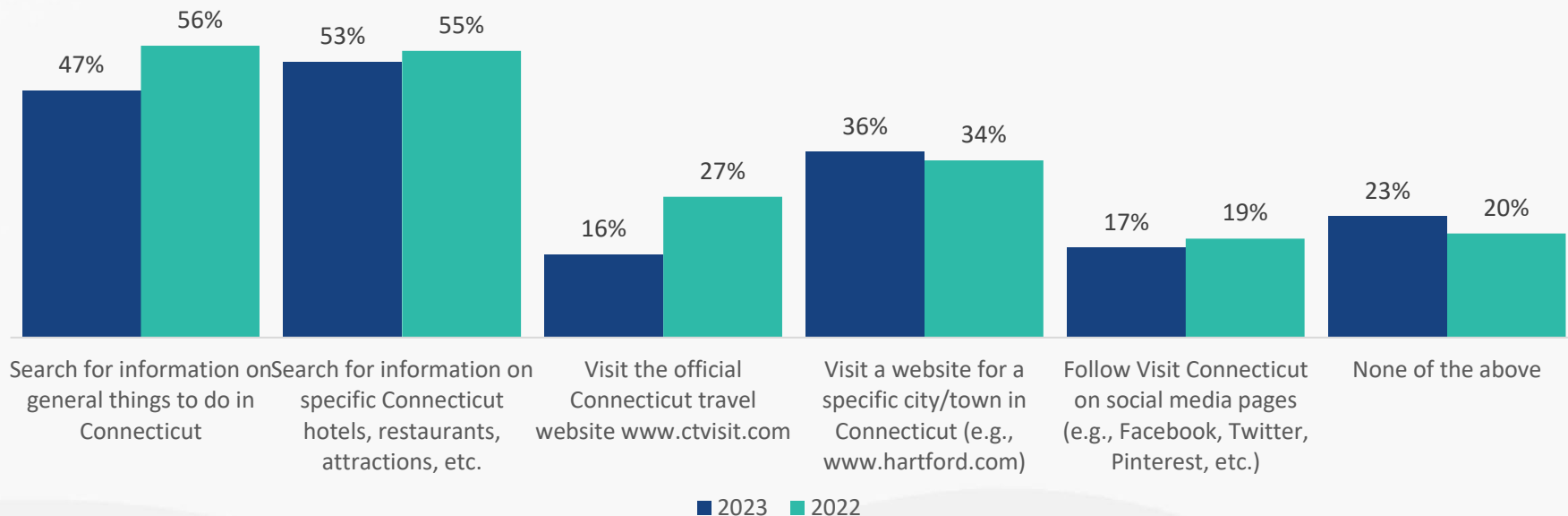


Length of Stay – History

Historic Average 3.0 Nights



Connecticut visitors indicated they were most likely to have searched for information on specific hotels, restaurants and attractions in addition to general information prior to visiting. And slightly more (36% vs 34%) visited a website for a specific city/town in Connecticut this year.



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.

Visitor & Target Market Demographics

Overall, Connecticut visitors have comparatively high household incomes, were a bit older and somewhat more diverse in 2023 than reported in recent years.

LGBTQ+ visitors to Connecticut earn slightly higher incomes (\$148k vs \$144k), are slightly younger (43.0 yrs vs 43.5 yrs) and are less diverse (16% vs 21%). They also visit more frequently (5.3 visits vs 4.0) and exhibit higher intent to visit (84% vs 74%).

Compared to H2R's Travel Sentiment monitor which tracks traveler profiles and attitudes nationwide, Connecticut visitors earn much higher incomes (\$144k vs \$81k nationwide), are somewhat younger (43.5 yrs vs 47.2 yrs) and are more diverse (21% vs 18%).

Category	2023 Visitors	2022 Visitors	2021 Visitors	2023 LGBTQ+ Visitors
Household Income	\$143.5k	\$142.8k	\$133.3k	\$148.4k
Age of Travel Respondent	43.5	42.5	41.0	43.0
25-34	16%	22%	32%	16%
35-44	42%	38%	33%	42%
45-64	42%	40%	35%	42%
Interest in Visiting Next 2 Years	57%	61%	70%	61%
Intent to Visit Next 12 Months	74%	74%	78%	84%
Number of Visits Past 5 Years	4.0	4.1	4.1	5.3
White, Non-Hispanic*	79%	81%	84%	84%
Black, Non-Hispanic	7.3%	5.9%	2.6%	7.9%
Hispanic	6.8%	8.5%	7.9%	7.9%
Asian	6.1%	5.1%	7.2%	5.3%
Other	4.2%	3.0%	2.0%	2.6%
LGBTQ+	5.3%	6.5%	8.5%	100%

**Note: Sum of races/ethnicities totals to >100% because some respondents fall into multiple categories.*

01. Brand Perception

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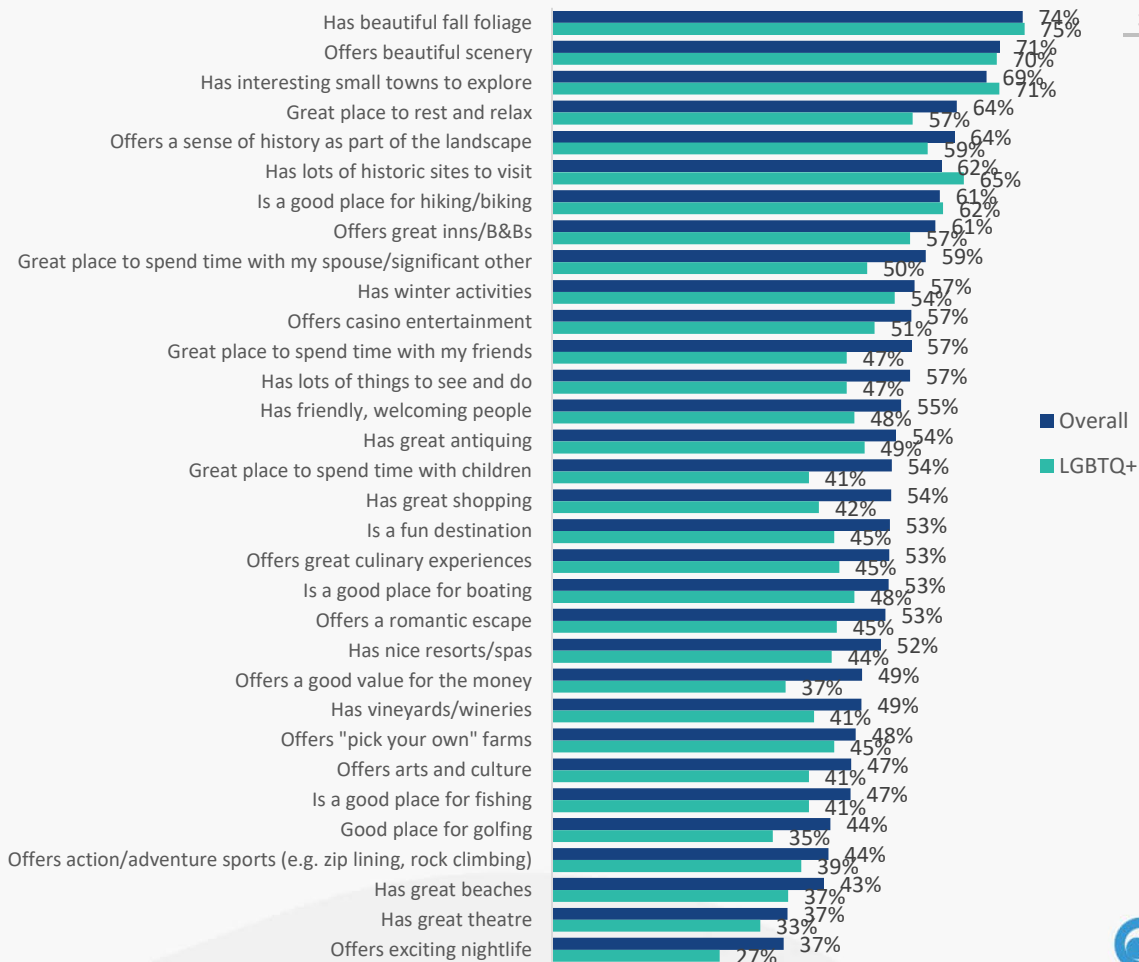
Brand Characteristics

Connecticut's Brand Characteristic ratings among LGBTQ+ audiences vary somewhat from that of the general population.

The LGBTQ+ audience rates Connecticut highest for its beautiful fall foliage (75%), interesting small towns (71%) and beautiful scenery (70%).

Contextually, the brand attributes the LGBTQ+ community rate higher than the gen pop audience includes lots of historic sites to visit (+4 points), interesting small towns to explore (+2 points) and good place for hiking and biking (+1 point).

Conversely, great place to spend time with children (-13 points), good value for the money (-12 points), and has great shopping (-11 points) rate much lower than gen pop travelers.



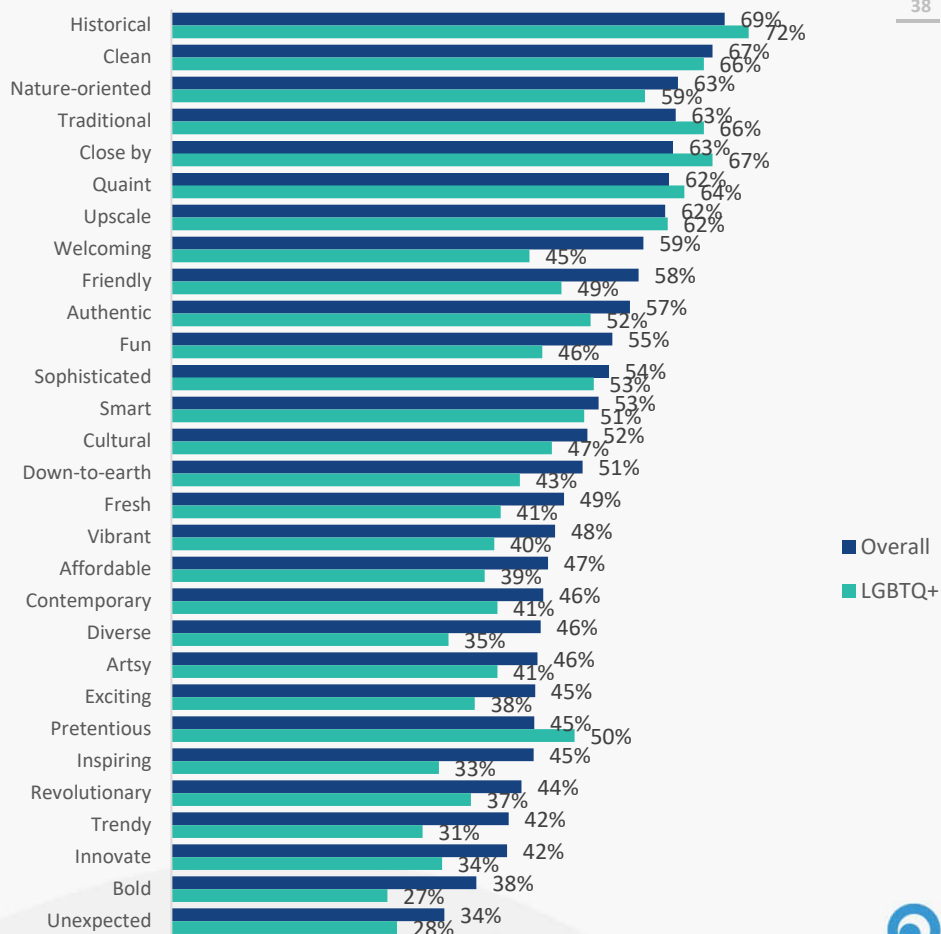
Brand Descriptors

LGBTQ+ Brand Descriptor ratings also vary from Connecticut's Overall Brand Descriptor ratings.

The LGBTQ+ audience rates Connecticut highest for being historical, close by, clean and traditional.

Contextually, the LGBTQ+ audience tends to rate Connecticut as being more Pretentious (+5 points), Close by (+5 points) and Traditional (+3 points) than the overall audience.

Conversely, this audience rates the state much lower than gen pop travelers for being Welcoming (-14 points), Inspiring (-12 points), and Diverse (-11 points).



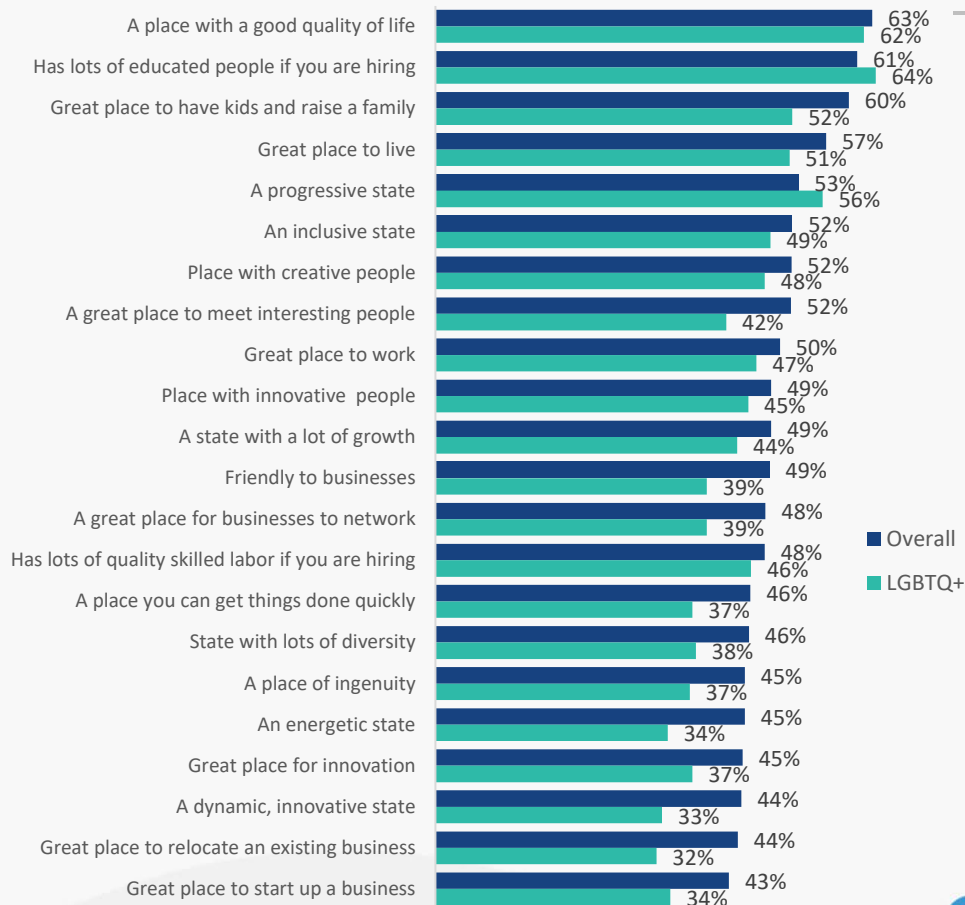
Business Characteristics

LGBTQ+ Business Characteristic ratings as compared to Connecticut's Overall Business Characteristic ratings.

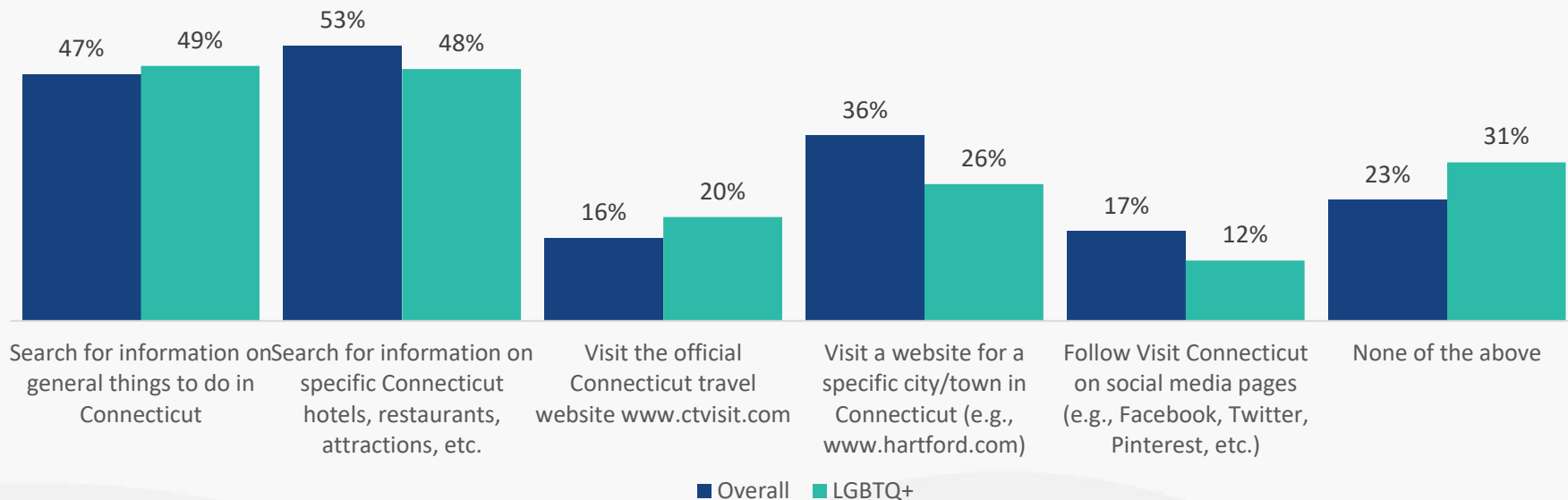
The LGBTQ+ audience rates Connecticut highest for having lots of educated people, good quality of life and being a progressive state—all same as last year.

Contextually, the LGBTQ+ audience tends to rate Connecticut higher for being a Progressive State (+4 points) and Having Lots of Educated People (+3 points).

Conversely, this same audience rates it lower than average for being a Great Place to Relocate a Business (-12 points), being a Dynamic/Innovative State (-11 points) and for being an Energetic State (-11 points).



Contextually, LGBTQ+ visitors are more likely to have used search engines to plan their trips to Connecticut and are somewhat less likely to have consulted websites for a specific city/town in the state and/or for specific hotels/restaurants/attractions.



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.

Research developed for the Connecticut Office of Tourism.

Our team loves the magic of data and research. We work until the voice of your customer is clear and you have the answers you need. If you have questions about this report, please let us know:

Email: jrenner@h2rmarketresearch.com

Call: 417.840.7180

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