

VISION INTERCEPT

Connecticut's Visitor Intercept Study

Vol 1605

2016 YEAR

VISION is the only Statewide, in-person study of CT visitors' experience. For 16 years, insights and measures of the now over 60,000 visitors interviewed have helped stewards of attractions, jobs and quality-of-life make informed decisions and track their results. Such stewards include legislators and experts in economic development, fundraising, event and meeting planning, group tours, human resources, tourism, culture and the arts. VISION measures the activity and profile of both CT residents and those who visit from out-of-State, and is the sole source of spending data enabling economic impact measurement.

Market Share: 60% = 6.2 trips/year

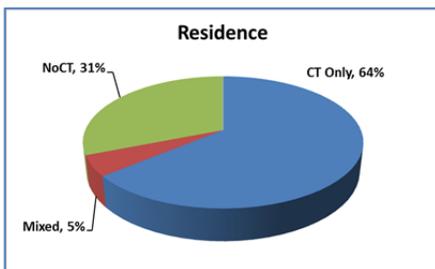
Visitors say that 60%, or 6.2 of their 8.8 trips/year were to Connecticut destinations. These figures are comparable to last year. 44% of visitors took 3+ trips a year to CT.

CT Residents: 69%

69% of parties had a CT resident, including 5% that *also* had someone in their party from Out-of-State. CT residents took 7.6 trips/year to CT, 66% share of all trips.

Out-of-State Draw: 36%

36% of parties included someone visiting from out-of-State, including the 5% who also had a CT resident in their party. Out-of-State visitors took 3.7 trips/year to CT, 49% of all of their trips. 14% of visitors came from NY/NJ, 43% of all Out-of-State visitors.



Spending: \$682/visit

Visitor parties spent an average of \$681.81 during each trip to the State's attractions and events, comparable to last year. Non-wager spending was \$525 on categories including Entertainment, Lodging, Dining, Shopping and Auto. Wagers were again 23% of average overall budget.

Household Annual Value: \$4,227/year

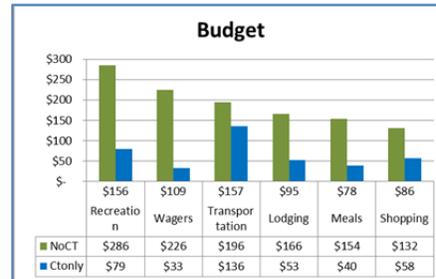
Given the number of trips per year, and average spending per trip, each visitor household spends \$4,227/year in Connecticut.

Note that CT Residents spend less per trip, but visit more often than Out-of-State visitors, resulting in comparable *annual*/value per household.

Budgets:

Out-of-State visitors spent \$1,158/trip and as expected, more than CT residents on every category including Lodging, Wagers and Shopping were the three largest categories.

CT residents spent \$399/trip with Shopping as their largest category, followed by Meals and Recreation.



Overnights: 65%

Of parties with out-of-State visitors, two in three spent at least one overnight during their visit, spending 3.2 nights on average. 42% spent some of their nights in commercial lodging. 42% stayed with family or friends.

Families: 36%

One in three parties included children under age 18. Parties with children took 4.9 trips/year and spent \$697 per trip. 78% of Families from Out-of-State spent an overnight.

Adults-Only: 62%

Two in three parties visited without children in party. They took 7.0 trips and spent \$654/trip.

Seniors: 35%

A third of parties included someone 55 or older. 5% of parties were adults-only but who had children at home.

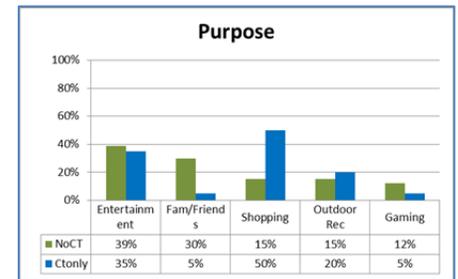
First-Time Visitors: 8%

92% of Out-of-State visitors this season had experienced Connecticut destinations before.

Purpose of Trip:

Out-of-State visitors say key draws are Entertainment (39%) and visiting Family and Friends (30%).

Residents are far less likely to be visiting Family and Friends or Gaming, and more likely than Out-of-Staters to be Shopping or enjoying Outdoor Recreation.



Satisfaction: 73%

73% of visitors gave a high rating (8-10) for their experience in Connecticut, with an average score of 8.3. 3% gave a low (<5) rating for a "Net" score of 70%. 76% of Out-of-Staters gave high score.

Campaign Recall: 36%

36% said they'd heard of CT's "*Still Revolutionary*" slogan (up from 33% last year). 65% of those said it had influenced taking their trip (36% highly influenced). 63% said it would influence future trips (36% would highly influence)

Household Characteristics:

3.0 persons is average size household

37% have children

38% have ages 18-34

53% have ages 35-54

42% have ages 55+

9% Black ethnicity

12% Hispanic/Latino ethnicity

\$83,200 is Median annual household income

23% earn less than \$50,000

18% earn more than \$150,000

VISION tracks visitors to a four-season panel of over 50 attractions across the State. The panel includes museums, casinos, parks, beaches, destination shopping, events, arts venues, farms and markets, vineyards and welcome centers. The database began in 2001 representing the millions of visitors to panel's attractions alone (*which is only a share of all visitors to all CT attractions*). Statistics based on the annual sample of 2,500+ parties has a maximum range of error of +/- 1.9% at the .95 Confidence Limit.

LONG-TERM TRENDS:

Millions of Visitors

VISION studies the **millions of visitors** to our State's diverse world-class attractions and events. These assets play a major role in CT residents' quality-of-life, making it easier for employers to recruit and retain top talent, enabling the State to attract and keep those employers. Thus, Connecticut's continued investment in tourism is a key economic "girder" running across and supporting each of our major economic "pillars."

Analysis of over 3,600 visitors interviewed across the year show that their overall travel (to any State) was comparable to prior years' activity at 8.8 trips this year vs 8.9 in '15, (11.0 trips in '14 and 8.5 in '13, 9.5 in '12 and 7.8 '11).

Connecticut's share held at 59%

This year's share was 59% as it was last year (61% in '14, 58% in '13, 57% '12), holding the *number* of Connecticut visits/year by each household at 6.2.

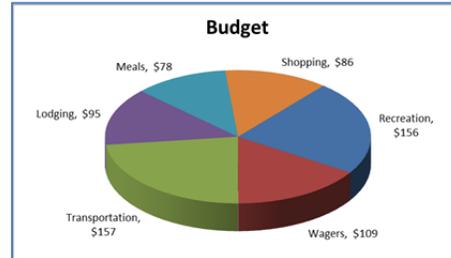
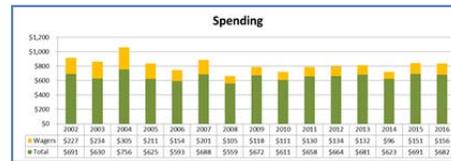
Comparable to last year, 36% of parties visiting our events and attractions included someone who lives out-of-State (holding vs low of 33% in '11). Connecticut residents continue to make up the majority of tourist parties (69% had a CT resident). Comparable to '15, 65% of our out-of-State-only guests spent some overnights.

Spending and Budgets

During each of their 6.5 visits, the average party spent \$681, comparable to last year (vs 2010's low of \$611).

8% of Out-of-State visitors say this was their first ever visit to CT. Given their likelihood of visiting again (68% highly likely), these new "customer" households join those which on average, spend \$1,299 each of 1.6 visits making each new Visitor household worth \$2,078 a year.

Overall, the distribution of spending has remained fairly consistent, with Recreation, Transportation and Lodging accounting for three-quarters of non-wager budget.



Prime the Pump

Importantly, 86% of the economic flow bypasses the very organizations doing the work to attract it. It behooves the State and nearby businesses to partner in helping these generally cash-poor organizations in any way they can, including kicking-in expertise and funds to boost their marketing budgets and investments in product/service enhancements.

A Foundation of Resident Tourists

As tourists, CT *Residents* represent fully 2/3 of the State's tourism market. This large segment also delivers multiple benefits including: visiting frequently as well as acting as both hosts of, and ambassadors to our out-of-state guests.

This year, the average number of visits per household of *CT residents* was 7.6 (vs 8.2 in '15, 10 in '14, 7.6 in '13, 9.2 in '12 and 6.7 in '11) with Connecticut capturing two thirds of all their overall tourism activity. Meanwhile, out-of-state guests reported that a half of their activity was to Connecticut, continuing at 3.7 visits comparable to the rate reported last year (3.6 in '15, a low of 2.6 in '11).

Strategic Balanced Target

CT Residents and Out-of-State visitors deliver comparable *economic* impact but in complementary ways. While out-of-State visitors are only a third of parties and visit less often than residents, they spend more each visit, annually contributing about the same value as Residents. Importantly, the two segments support different *elements* of our tourism infrastructure. While attractions and events could not survive without the frequent visits of our State's residents, Out-of-State guests support lodging, dining and other services critical to our quality-of-life and other non-tourism businesses.

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Avg.# Trips/Yr. to CT	5	4.7	5	8.1	6.6	4.7	4.2	5.9	4.8	5.3	7.1	6.1	7.8	6.5	6.2
Avg. % of all trips to CT	47%	51%	51%	60%	82%	48%	51%	65%	50%	56%	57%	58%	61%	59%	60%
%Parties w Out of State residents	48%	40%	47%	44%	45%	41%	37%	37%	34%	33%	40%	38%	37%	36%	36%
Of Parties w Out-of-State:															
% w Overnights	60%	61%	60%	47%	48%	43%	65%	66%	58%	61%	65%	65%	66%	65%	65%
Avg.# Nights	2.3	2.1	2.5	1.7	2.2	2.5	2.9	2.8	2.4	2.4	3.5	3.4	3.2	3.1	3.2
% Family & Friends	36%	37%	39%	33%	49%	45%	38%	40%	34%	27%	41%	41%	40%	40%	42%
%Parties with kids	23%	24%	23%	20%	32%	34%	39%	41%	41%	43%	38%	37%	37%	37%	36%
Satisfaction w CT: (% rating High)	71%	75%	71%	67%	72%	71%	72%	69%	71%	68%	74%	75%	74%	74%	73%
Likely to return: (% rating High)	81%	84%	81%	75%	84%	81%	81%	80%	74%	80%	76%	76%	80%	80%	81%
Total Spending	\$691	\$630	\$756	\$625	\$593	\$688	\$559	\$672	\$611	\$658	\$664	\$681	\$623	\$691	\$681
Non Wager Spending	\$464	\$396	\$451	\$414	\$439	\$487	\$454	\$554	\$500	\$528	\$530	\$549	\$485	\$540	\$525

VISION insights and measures have enabled the State's tourism marketing program to be more efficient and effective. For example:

Insight	Strategic Response
Spending patterns feed data to the State's economic impact analysis.	Document and promote both the high \$ amount, and ROI of tourism investment.
Most itineraries include some shopping, dining, lodging... and visits to other attractions.	Promoted creative multiple-day itineraries. Other States have copied CT's lead.
Most of the cash drawn to CT by attractions is captured by their surrounding businesses	Built partnerships to support the attractions and events that generate the value.
CT residents and visitors from Out-of-State have comparable economic impact.	Attracted/Informed State's residents: as tourists as well as hosts and ambassadors.
Parties with Children and those without have comparable economic impact.	Promoted itineraries attractive to Families and others for Adults