

Connecticut

Brand Perception & Health Research

Prepared for Connecticut Office of Tourism

Delivered January 2025

THE CLOSEST TO THE CUSTOMER WINS.



Project Overview

Segments Examined	N Size
Overall (All Travelers)	1,001
LGBTQ+	257
Visitors past 5 years	404
LGBTQ+ visitors past 5 years	93
Visitors past 2 years	351
LGBTQ+ visitors past 2 years	73

Sample sizes less than 125 should only be used for directional purposes only.

Purpose. The purpose of conducting the Connecticut Brand Perception & Health 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 2024 Brand Perception & Health Research was conducted in November and December of 2024 among a general population cell of travelers living in Connecticut, Massachusetts, New York, Rhode Island and Florida. Respondents were further screened to ensure they have traveled for leisure in the past two years, are household decision makers, are ages 25-64 and have an annual household income of \$75,000 or more. Throughout this report, the target audience is referred to as travelers.

It should be noted that while the report continues to provide an apples-to-apples comparison of markets where COT focused its marketing efforts, the specific states comprising that trade area changed this year. New Jersey and Pennsylvania were removed, and Florida was added. Therefore, while this report continues to measure advertised markets as a whole, one should note that the composition has changed.

Sample. A total of 1,001 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 257 fall into this category for a maximum margin of error of +/-6.1% at a 95% confidence interval.

Key Takeaways

- The 2024 Brand Perception & Health Research for Connecticut reveals that the state's marketing efforts are paying off. Connecticut is viewed very positively by travelers, with significant increases in state pride and interest in visiting. COT's marketing has effectively boosted perceptions, especially among the LGBTQ+ community, leading to higher interest and intent to visit. However, to further enhance Connecticut's appeal as a travel destination, the state needs to address concerns about limited entertainment options, high costs and infrastructure. Overall, the research confirms that the marketing strategies are working, but there is room for growth to make Connecticut an even more attractive destination.
- Several new insights were incorporated into this year's survey.
 - **Reputation.** A new question was added to this year's study asking travelers to rate their opinion of Connecticut's reputation as a travel destination. More than nine in ten (92%) feel Connecticut has a somewhat/very positive reputation—led by travelers from New York, Massachusetts and Florida. Interestingly, CT residents (86%) rate the state's reputation lower than do travelers.
 - **Top-of-Mind Descriptions.** Travelers are most likely to describe Connecticut with terms such as beaches, shoreline, Long Island Sound, Mystic Seaport, Yale University, Mark Twain house, historical sites, casinos, museums, fall foliage, natural beauty, Hartford, New Haven, Greenwich, etc.

Key Takeaways

- Continued new insights were incorporated into this year's survey.
- **Connecticut NPS as a Place to Visit.** *Promoters* say its natural beauty, historical significance, coastal appeal and geographic accessibility. *Detractors* say its lack of entertainment/attractions, cost concerns and limited exposure to the state.
- **Connecticut NPS as a Place to Work.** *Promoters* say its strategic location, strong economy and job market, professional environment and quality of life balance. *Detractors* say its high cost of living and taxes, limited job market and accessibility challenges related to traffic and construction.
- **Connecticut NPS as a Place to Live.** *Promoters* say its strategic location, quality of life/safety, educational excellence, natural beauty and economic opportunities. *Detractors* say its high cost of living, climate and location challenges and lack of excitement.
- **Encouraging More Recommendations.** Persuading a larger number of travelers to recommend Connecticut as a place to visit may be a challenge. Most say they'd need discounts, more tourist attractions, better infrastructure, more information and improved safety.
- **LGBTQ+.** Marketing efforts have had a substantial impact on the LGBTQ+ community, with interest in visiting increasing by 13 points and intent to visit rising by 8 points. LGBTQ+ travelers are also more likely to take action after seeing COT's marketing efforts.

Key Takeaways

- **Connecticut's Brand Perception is Excellent and Improving**
 - In addition to Connecticut's positive reputation among travelers (92%), Connecticut **residents' pride in their state increased significantly** to 61% in 2024, although it still ranks 6th among its competitive set.
 - Connecticut's brand as a travel destination is viewed positively for its **beautiful fall foliage, beautiful scenery and interesting small towns**, with these attributes scoring significantly higher than historical averages.
- **Brand Health Improved in 2024**
 - Connecticut's marketing efforts have positively impacted brand perception, with significant lifts in brand characteristics, descriptors and business characteristics among those aware of the marketing.
 - The state is seen as a good place to attend college, raise a family and work as well as finding like minded people to build a community, with more than six in ten respondents agreeing with these statements.

Key Takeaways

- **COT's Marketing Campaign was Effective**
 - Marketing awareness increased, with 68% of travelers recalling Connecticut marketing messages, up three points from last year.
 - Travelers reached by Connecticut's marketing efforts were 37 points more interested in visiting and 38 points more likely to visit in the next 12 months compared to those who hadn't seen any marketing.
 - LGBTQ+ travelers showed even higher increases in interest and intent to visit after being exposed to marketing efforts.
- **Connecticut Visitors are Upscale and Increasingly Diverse**
 - Connecticut's target visitors have high household incomes, are slightly younger and more diverse than national averages recorded in H2R's National Traveler Sentiment study.
 - LGBTQ+ visitors tend to have higher incomes, are younger and visit more frequently than the general population.

Key Takeaways

- **Business Characteristics are Positive**
 - Connecticut is perceived positively as a place to do business, with significant improvements in attributes such as having educated people, great place to have kids and raise a family as well as being a progressive state.
- **A Few Challenges and Opportunities Exist**
 - While Connecticut has a strong positive perception, challenges include limited entertainment options, high costs, a need for more tourist attractions.
 - Opportunities for improvement include offering discounts, enhancing tourist attractions, providing more information and ensuring safety.
- **Conclusion**
 - The 2024 Brand Perception & Health Research indicates that Connecticut's marketing efforts have successfully enhanced the state's brand perception and increased interest and intent to visit. The state is viewed positively for its natural beauty, historical significance and quality of life. However, addressing challenges related to entertainment options, costs, and infrastructure could further improve Connecticut's attractiveness as a travel destination.

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01. Brand Perception

Overall | N=1,001; LGBTQ+ | N=257

02. Brand Health

03. Marketing Impact

04. Visitor Profile

05. Appendix

Resident State Pride

Connecticut residents' pride of their state increased significantly in 2024. At 61%, it remains well ahead of its historic benchmark (45%).

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

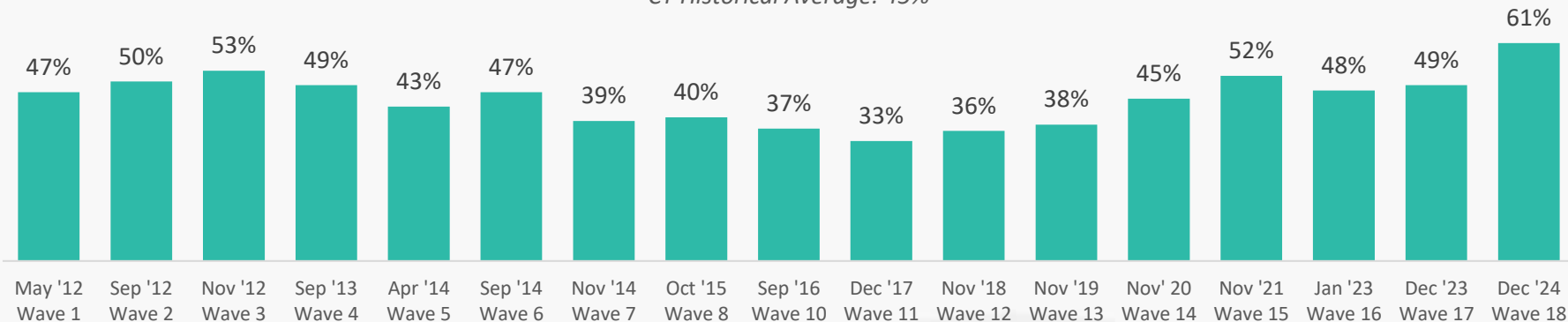
% Very/Extremely Proud to Be a Resident of Their State

Competitive Set Average: 72%



Connecticut State Pride History

CT Historical Average: 45%



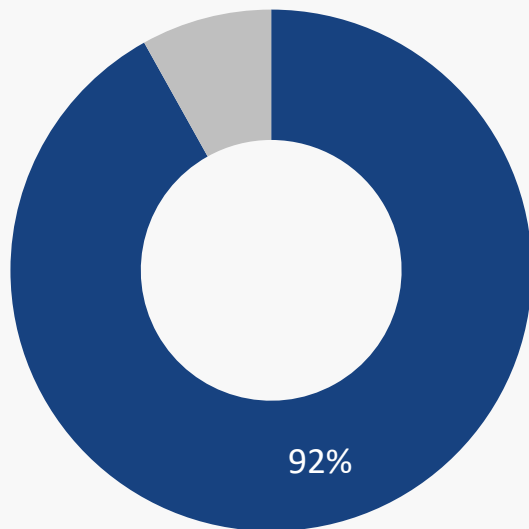
How proud do you feel about being a resident of your state? 5-pt. scale

*Sample size less than 125 and should only be used for directional purposes only.

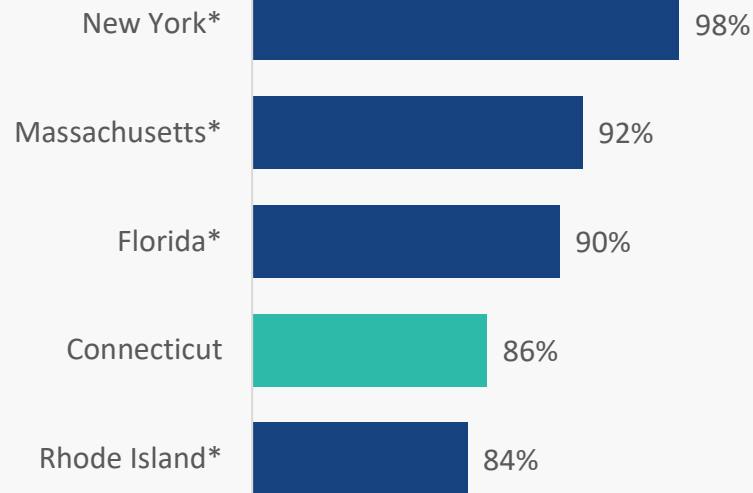
Connecticut has a very positive reputation among travelers with more than nine in ten (92%) viewing it as being somewhat or very positive. But Connecticut residents (86%) are a bit less likely than average to feel this way.

Connecticut's Reputation

% Somewhat/Very Positive



Connecticut's Reputation by State



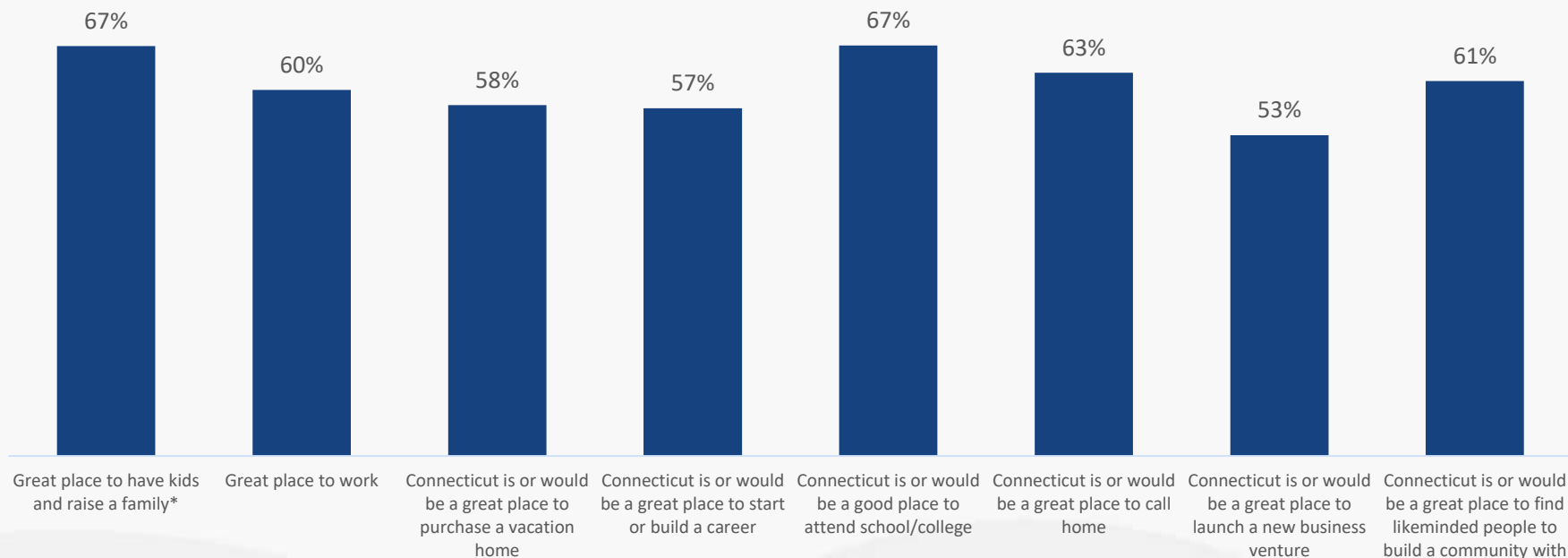
Please rate how you feel about Connecticut's reputation as a travel destination. 5-point scale.

*Sample size less than 125 and should only be used for directional purposes only.

More than six in ten view Connecticut as a good place to attend college (67%), to have kids and raise a family (67%), great place to call home (63%), great place to find likeminded people (61%) and a great place to work (60%).

Connecticut as a Place to Live, Work & Play

% Somewhat/Strong Agree



Indicate to what degree you perceive Connecticut as a.... 5-point 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 statement describes Connecticut. 5-pt. scale

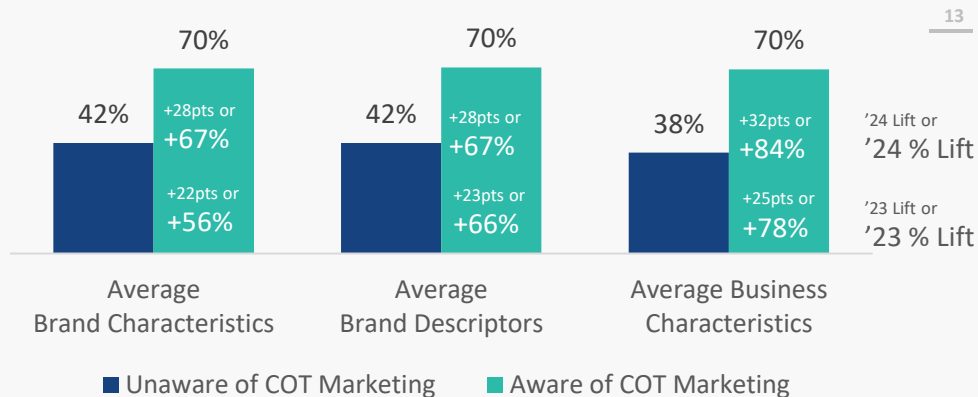
Connecticut Brand Ratings

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.

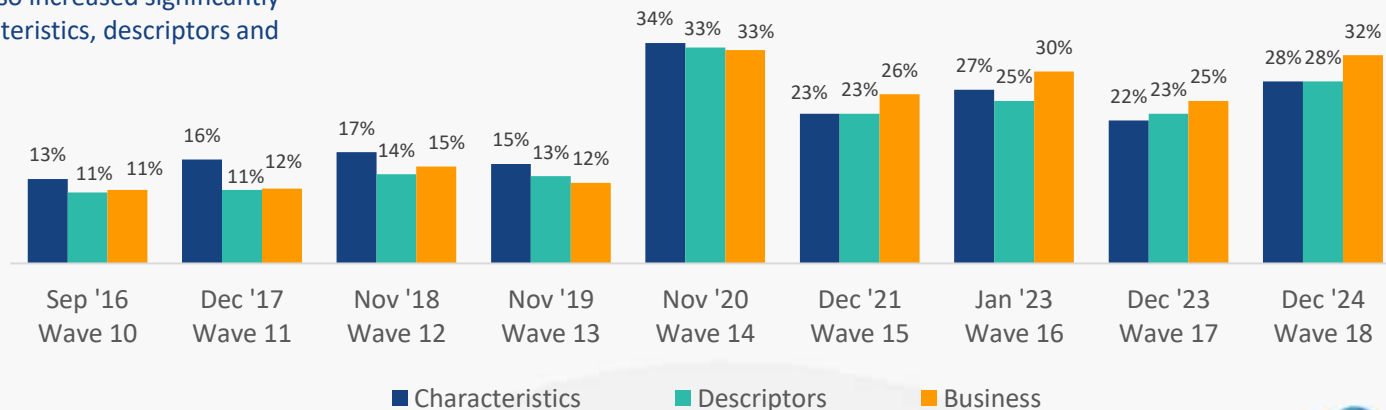
And, after a small dip last year, Connecticut's ratings generated larger margins of percent lift in 2024 than has been seen in several years.

The lift among LGBTQ+ travelers also increased significantly across all three categories – characteristics, descriptors and business characteristics.

LGBTQ+ Lift:
 Characteristics: +27pts or +69%
 Descriptors: +26pts or +63%
 Business: +31pts or +86%



Marketing 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
 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 statement describes Connecticut. 5-pt. scale

Among all respondents, Connecticut's brand characteristics remained consistent with beautiful fall foliage, beautiful scenery and interesting small towns leading the way. And most of these ratings posted significantly stronger scores than the state's historic averages.

Describes CT well/extremely well	2024	Avg		2024	Avg
Has beautiful fall foliage	75%	55% ▲	Has great shopping	61%	57% ▲
Offers beautiful scenery	72%	59% ▲	Great place to spend time with children	60%	49% ▲
Has interesting small towns to explore	71%	57% ▲	Has great antiquing	59%	52% ▲
Offers a sense of history as part of the landscape	69%	57% ▲	Has nice resorts/spas	59%	55% ▲
Has lots of historic sites to visit	69%	60% ▲	Is a fun destination	58%	48% ▲
Great place to rest and relax	68%	49% ▲	Has vineyards/wineries	57%	49% ▲
Has winter activities	68%	49% ▲	Offers arts and culture	57%	49% ▲
Great place to spend time with my spouse/significant other	64%	58% ▲	Offers "pick your own" farms	55%	47% ▲
Great place to spend time with my friends	64%	47% ▲	Offers a good value for the money	55%	59% ▼
Offers great inns/B&Bs	64%	54% ▲	Is a good place for fishing	55%	41% ▲
Has lots of things to see and do	63%	53% ▲	Offers casino entertainment	53%	46% ▲
Has friendly, welcoming people	63%	54% ▲	Good place for golfing	50%	41% ▲
Is a good place for hiking/biking	63%	58% ▲	Offers action/adventure sports (e.g. zip lining, rock climbing)	50%	46% ▲
Offers great culinary experiences	62%	63%	Has great theatre	50%	48%
Is a good place for boating	62%	61%	Has great beaches	49%	45% ▲
Offers a romantic escape	61%	51% ▲	Offers exciting nightlife	45%	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. This table shows only those KPIs where a contextual comparison exists.

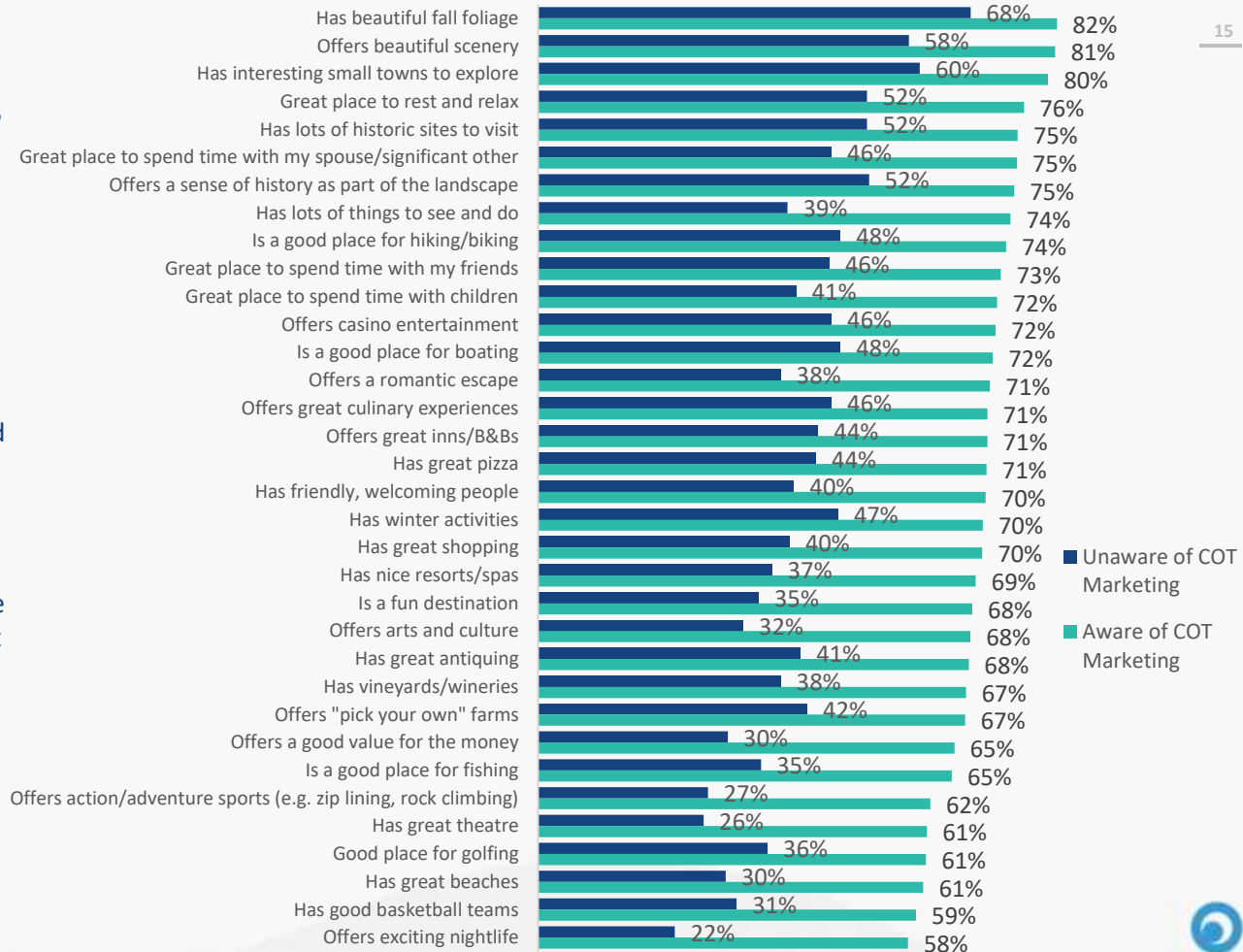
▲▼ Denotes a statistically significant variance to Historical Average

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 characteristic measured exhibited a positive lift between those reached by the marketing vs. those who were not reached.

The largest variances in 2024 came in the perception of Connecticut as a place that offers exciting nightlife (+37 points), arts and culture (+36 points) and good value for the money (+36 points).



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

The adjectives used to describe Connecticut among all respondents were all positive—yet a bit different than prior years. These included being historical, traditional, upscale and quaint. Last year the top descriptors were historical, clean, nature-oriented and traditional. Nearly all posted increases over last year.

Describes CT well/extremely well	2024	Avg		2024	Avg
Historical	73%	52% ▲	Down-to-earth	61%	53% ▲
Traditional	70%	55% ▲	Fun	60%	59%
Upscale	68%	54% ▲	Artsy	60%	55% ▲
Quaint	68%	49% ▲	Vibrant	58%	55%
Authentic	67%	55% ▲	Innovate	55%	42% ▲
Nature-oriented	66%	56% ▲	Exciting	55%	39% ▲
Friendly	65%	49% ▲	Trendy	53%	48% ▲
Welcoming	65%	54% ▲	Diverse	53%	41% ▲
Smart	64%	49% ▲	Affordable	52%	44% ▲
Sophisticated	62%	49% ▲	Unexpected	45%	44%

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. This table shows only those KPIs where a contextual comparison exists.

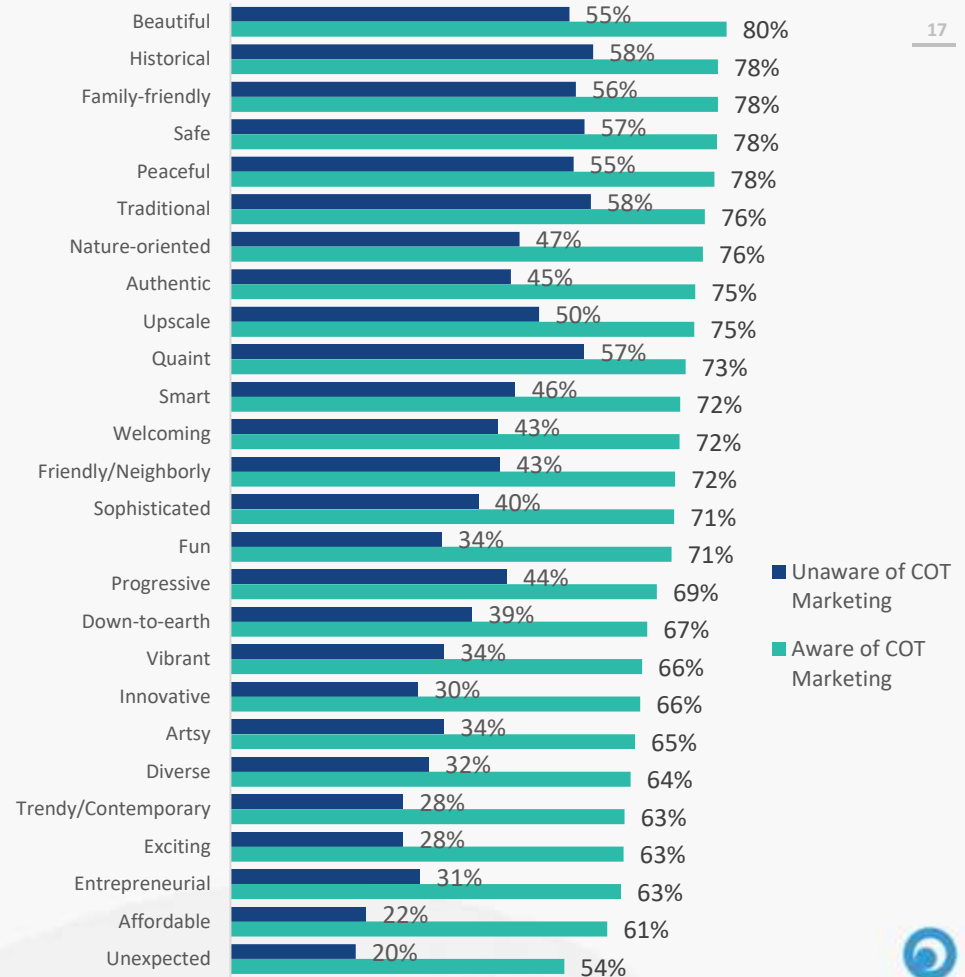
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Brand Descriptors

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

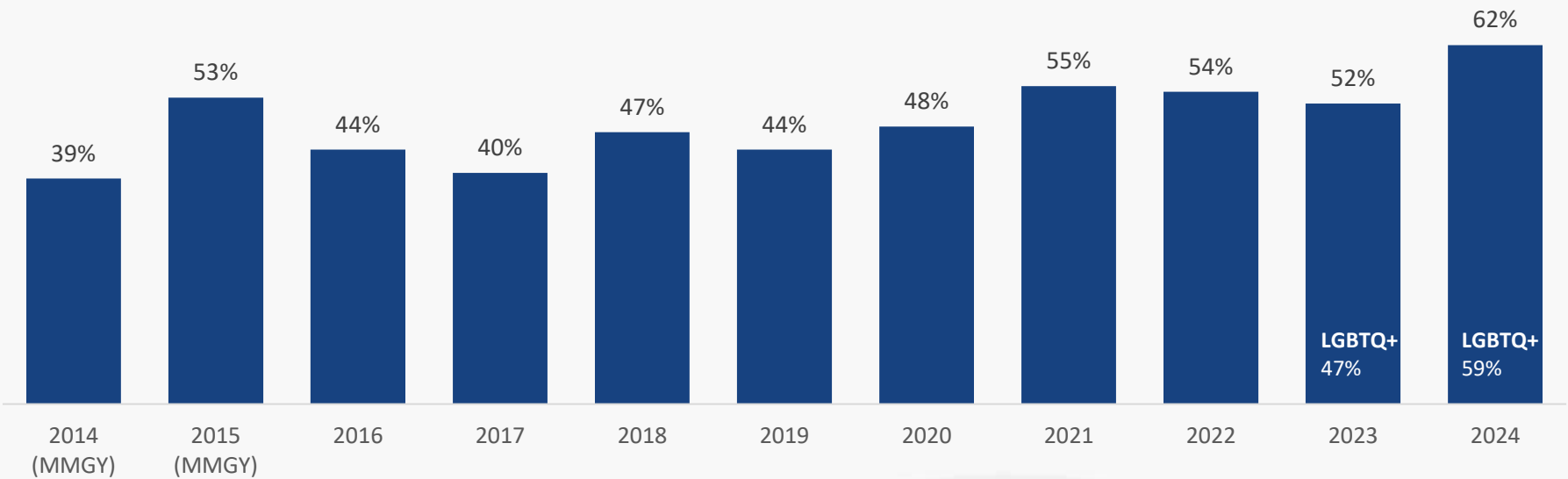
The brand descriptors averaged 70% among those aware of Connecticut's marketing efforts compared to those unaware of Connecticut's marketing at only 42%, leaving a positive marketing lift of +29 points.

The largest variances between ad aware and ad unaware travelers in the target market came from the descriptors of being affordable (+39 points), fun (+37 points), innovative (+36 points) and trendy (+36 points).



The average score for Connecticut’s brand descriptors (62%) increased significantly from last year’s 52% score and remain well ahead of Connecticut’s historic average (50%).

History of Brand Descriptors Average Score - % Describes CT Well/Extremely Well
CT Historical Average: 49%



Apples-to-Apples CT, MA, NY, RI 58% 62%

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 improved in 2024. Connecticut has an overwhelming positive perception as a place to do business, and all of its primary business-related brand attributes increased this year across a slightly different geographic target that included Florida.

Describes CT well/extremely well	2024	Avg		2024	Avg
Has lots of educated people if you are hiring	69%	49% ▲	An inclusive state	56%	54%
Great place to have kids and raise a family	67%	49% ▲	A place of ingenuity	56%	41% ▲
A progressive state	64%	56% ▲	Great place for innovation	56%	49% ▲
Great place to live	63%	51% ▲	State with lots of diversity	56%	42% ▲
Place with creative people	62%	45% ▲	A great place for businesses to network	55%	45% ▲
A great place to meet interesting people	62%	51% ▲	An energetic state	54%	50% ▲
A great place to work	60%	44% ▲	A place you can get things done quickly	54%	45% ▲
Friendly to businesses	59%	46% ▲	A dynamic, innovative state	54%	44% ▲
Place with innovative people	58%	46% ▲	Great place to relocate an existing business	52%	44% ▲
Has lots of quality skilled labor if you are hiring	57%	52% ▲	Great place to start up a business	51%	52%
A state with a lot of growth	57%	42% ▲			

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. This table shows only those KPIs where a contextual comparison exists.

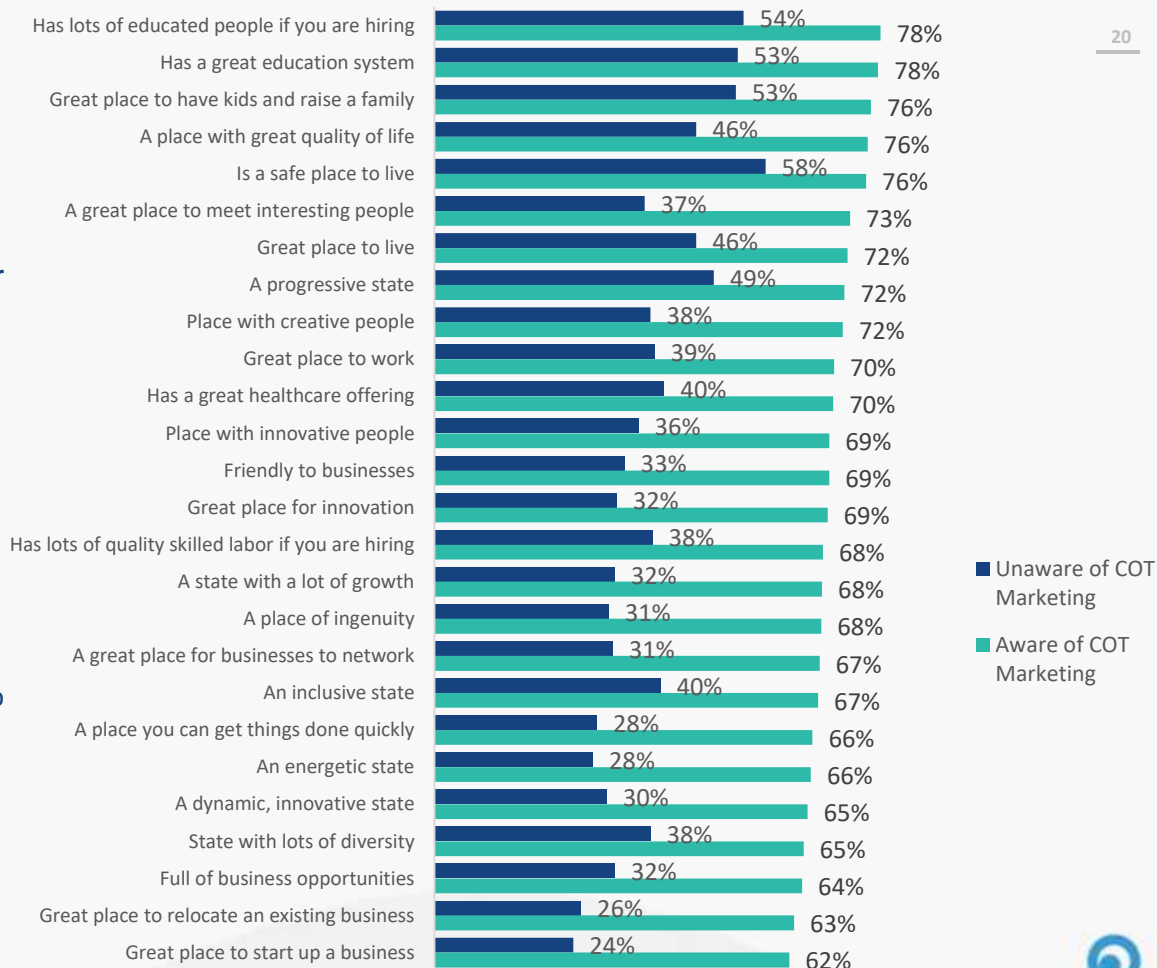
▲▼ Denotes a statistically significant variance to Historical Average

Business Characteristics

Likewise, the perception of Connecticut as a place to do business continues to post significantly higher perceptions 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 (70%) at an average of 32 points higher than those who have not seen the marketing (38%).

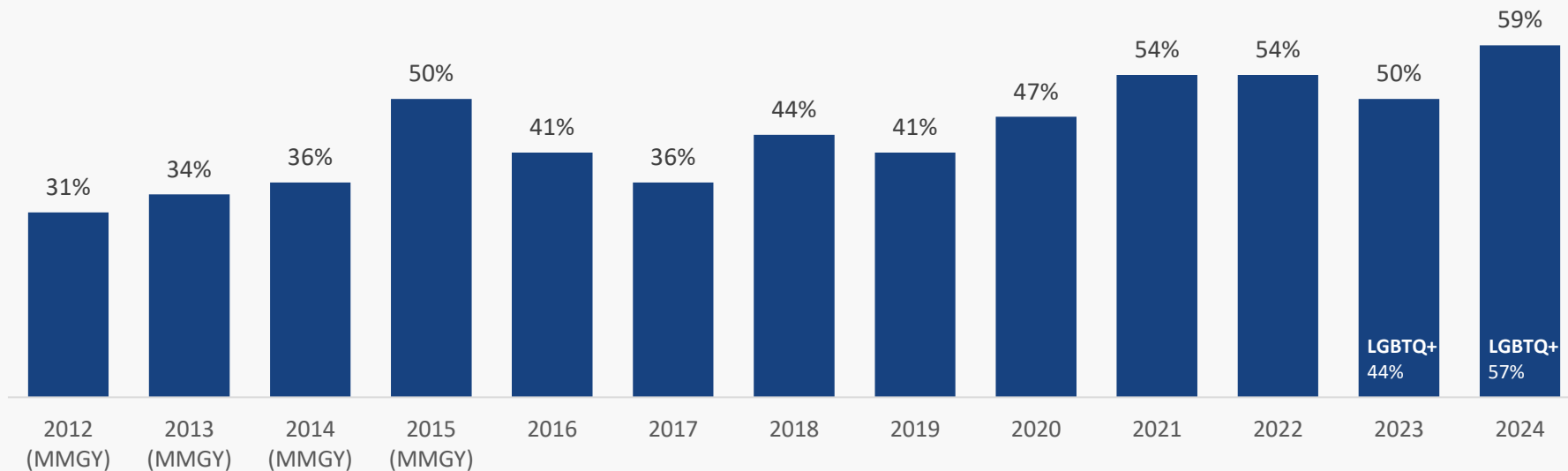
Travelers who are unaware of Connecticut's marketing were far less likely to view Connecticut as being a great place to start a business (-38 points), to get things done quickly (-38 points) and as a great place to relocate a business (-37 points).



Overall, Connecticut's business brand characteristic (59%) posted its strongest performance ever recorded and far above the state's historic average (43%).

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

CT Historical Average: 44%



Apples-to-Apples
CT, MA, NY, RI

55%

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



01. Brand Perception

02. Brand Health

Overall | N=1,001; LGBTQ+ | N=257

03. Marketing Impact

04. Visitor Profile

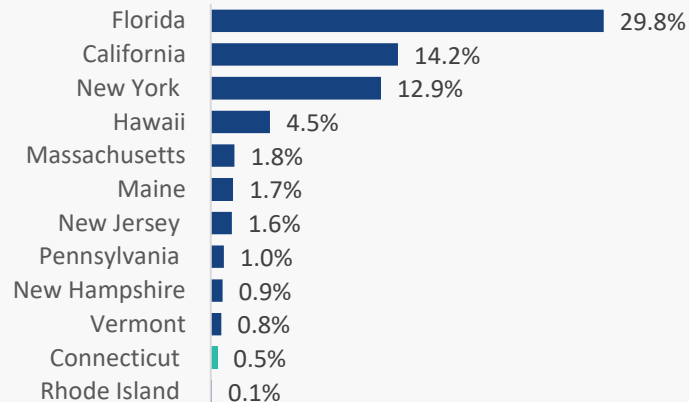
05. Appendix

Unaided Brand Awareness

As the targeted geographic markets spread out a bit, it is of little surprise that top-of-mind brand awareness has slipped. This year, 0.5% mentioned Connecticut as one of the first states they would think of for travel.

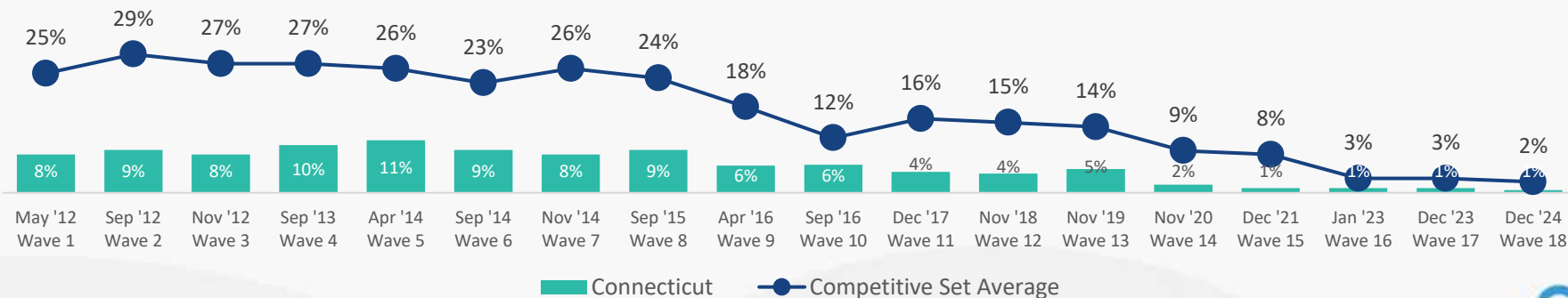
Similarly, the New England comp set also saw its top-of-mind awareness (2.4%) slip as well.

Unaided Brand Awareness – Competitive States



Unaided Brand Awareness History

CT Historical Average: 5.7%



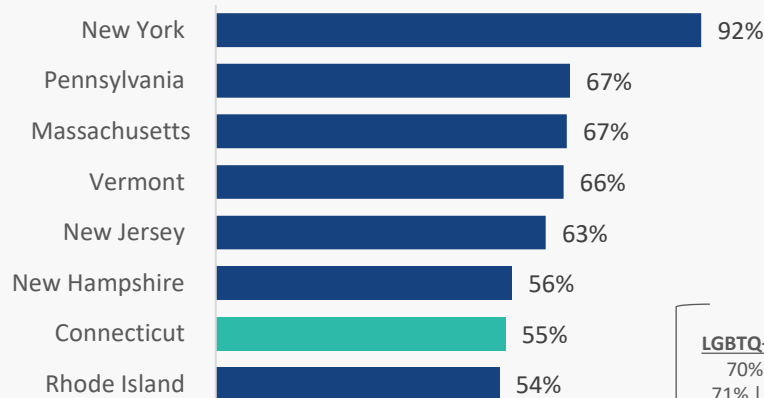
When you think about places to visit or travel to, please type the first STATE that comes to mind in the space below.
And what other STATES do you think of as places to visit or travel to?

Aided Brand Awareness

Connecticut's aided brand awareness remains strong. Nearly six in ten travelers (55%) across advertised markets are familiar with Connecticut as a place to visit. And while this is down slightly from the 62% recorded last year, it is important to remember that the geographic target jettisoned New Jersey and Pennsylvania this past year while adding Florida which is a bit further away. The comp set as a whole also slipped from 72% to 65%.

Interestingly, among this slightly adjusted target audience, Connecticut ranked above Rhode Island and did not fall into last place as it has for the recent past.

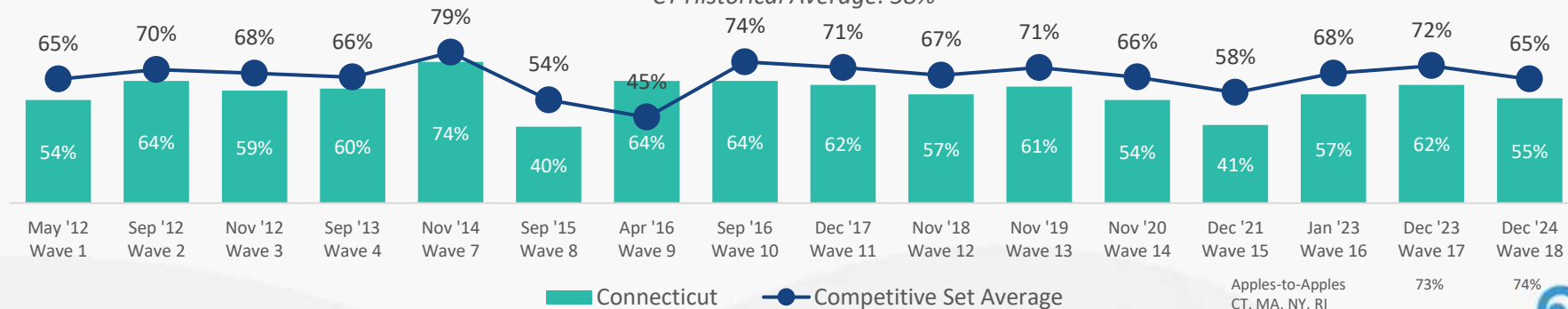
Aided Brand Awareness – Competitive States



LGBTQ+ ('24 | '23):
70% | 68% CT
71% | 77% Comp

Aided Brand Awareness History

CT Historical Average: 58%



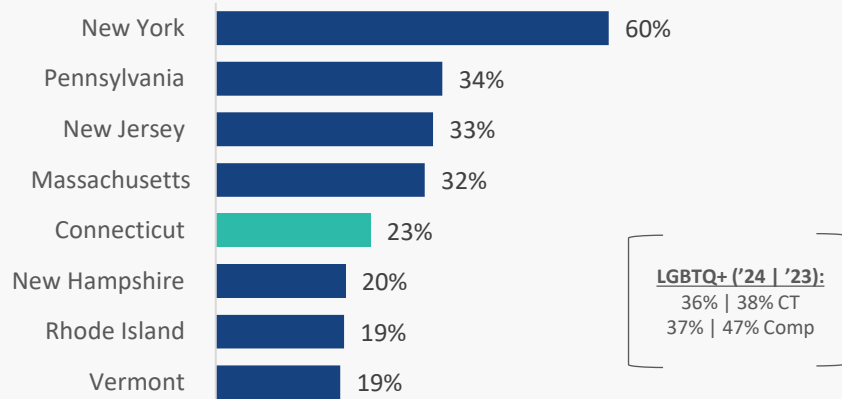
And, even if you just mentioned any of these states, which of the following STATES have you ever heard about as a place to visit or travel to?

Visitation in the Past Five Years

Connecticut's market capture rate over the past five years among this adjusted geographic target slipped from 34% last year to 23% in 2024. Of course, the comp set also declined from 41% to 30%. This is not necessarily a decline but rather a shift in the geographic target.

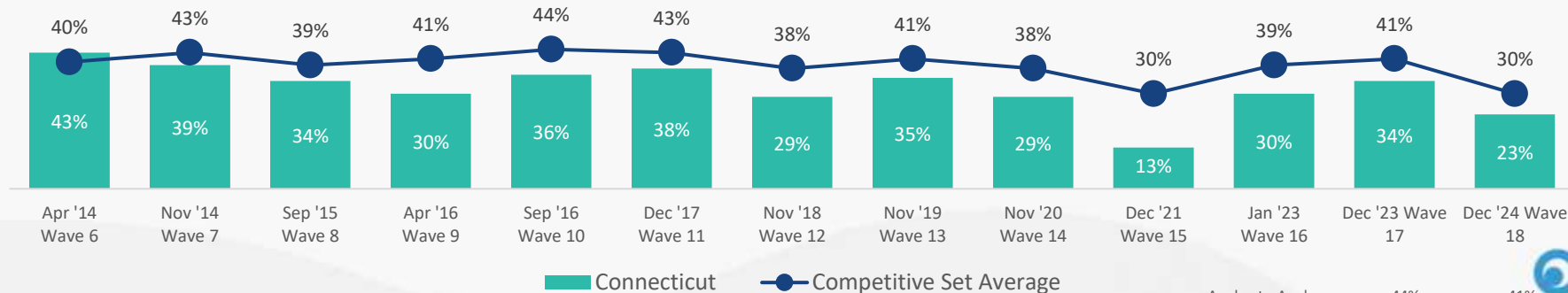
And interestingly, COT's market capture among LGBTQ+ (36% vs. 38% last year) held up significantly better than did its competitive set which captured 37% of the LGBTQ market, falling sharply from the 47% reported last year.

Visitation – Competitive States



Connecticut Visitation History

CT Historical Average: 32%



Apples-to-Apples
CT, MA, NY, RI

44%

41%



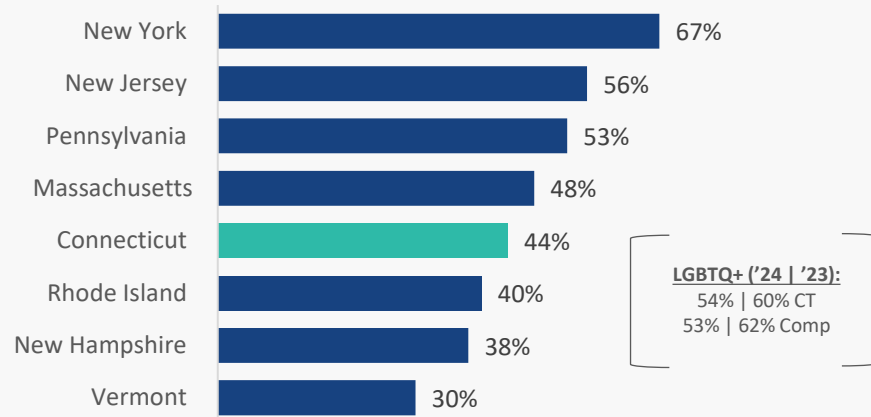
Using the scale provided, please indicate which of the following destinations you have visited for a getaway.

Conversion Rate

Connecticut converted 44% of its new geographic target market in 2024. And while this is 12 points lower than last year, the comp set also fell 9 points from last year.

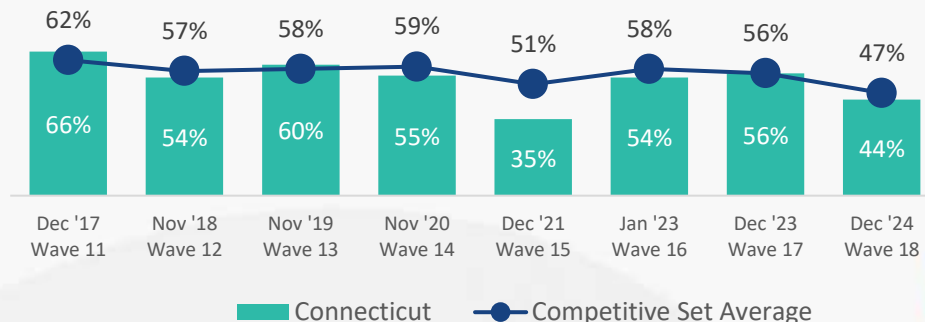
Similar to the market capture rate, conversion rates among the LGBTQ+ audience slipped from 60% posted last year to 54% in 2024. But this 6-point decline was much smaller than the comp set experienced with its conversion rate slipping nine points from 62% in 2023, to 53% this year.

Conversion Rates – Competitive States



Conversion Rates History

CT Historical Average: 53%



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

Apples-to-Apples

70%

64%

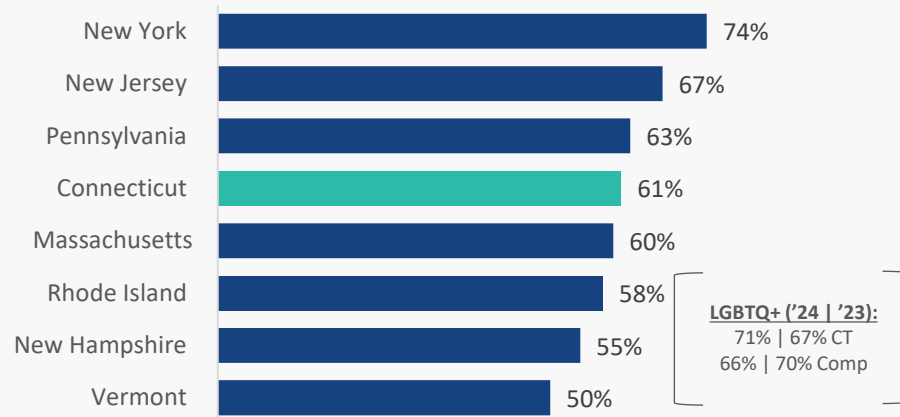


Retention Rate

Connecticut continues to hold onto past travelers comparatively well. In 2024, the state earned a retention rate of 61% among the new geographic target, down five points from last year—mirroring the comp set as a whole.

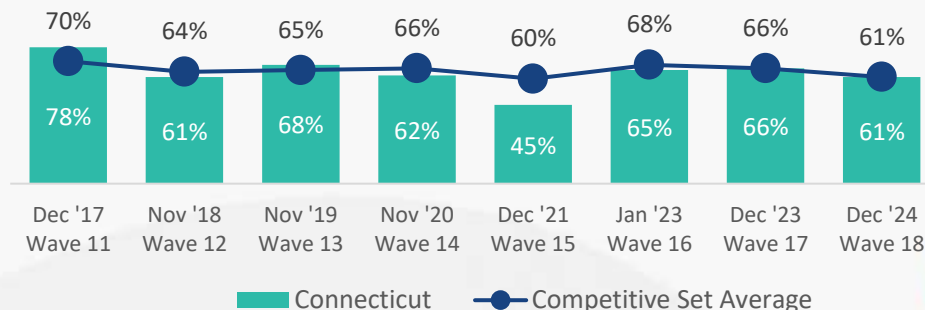
Among the LGBTQ+ audience, however, Connecticut's retention rate (71%) increased from 67% reported last year—while the comp set saw its retention rate (66%) slip four points from the 70% recorded in 2023.

Retention Rates – Competitive States



Retention Rates History

CT Historical Average: 63%



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

Apples-to-Apples

77%

72%

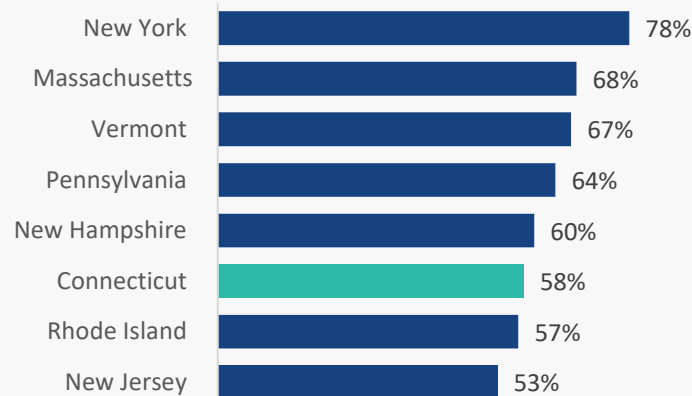


Interest in Visiting

Interest in visiting Connecticut increased from 50% last year to 58% in 2024, underscoring one of the many reasons COT chose to shift its geographic target. And this 8-point increase was significantly stronger than the 3-point increase earned among the competitive set.

And among LGBTQ+ travelers, interested increased considerably more growing from 42% last year to 55% in 2024, up 13 points. Meanwhile, the comp set increased from 58% to only 61%.

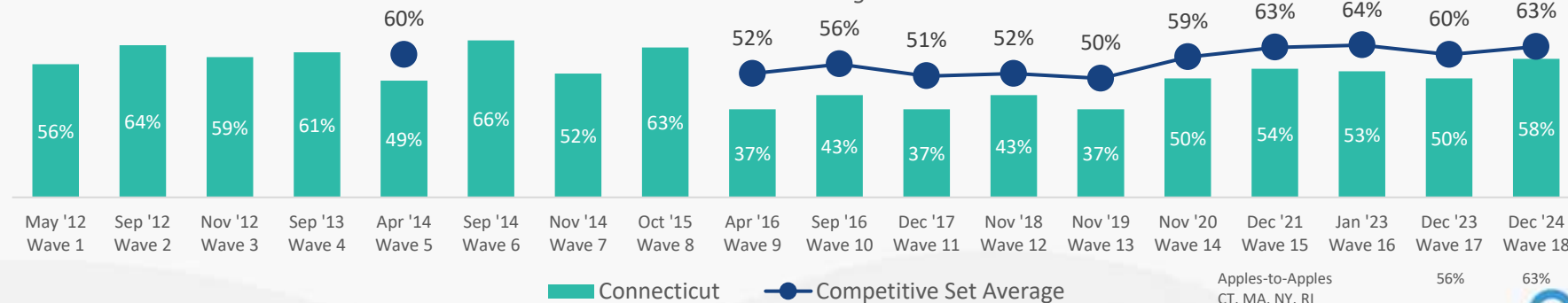
Interest in Visiting – Competitive States



LGBTQ+ ('24 | '23):
55% | 42% CT
61% | 58% Comp

Interest in Visiting History

CT Historical Average: 51%



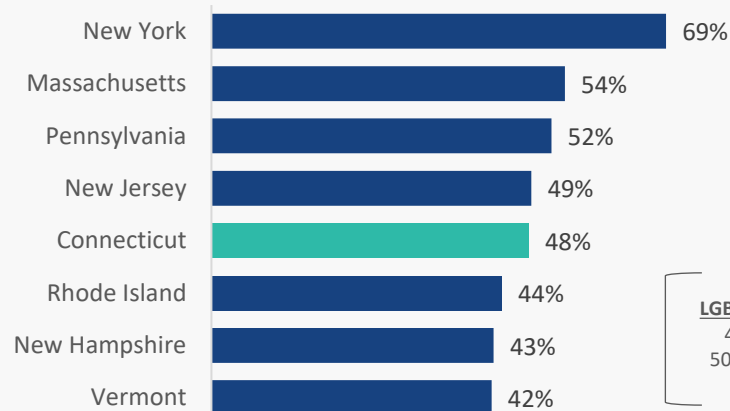
How interested would you say you are in visiting each of the following destinations for a Northeast getaway during the next two years?
Please use a scale from 1 to 5 where 1 is "not interested at all" and 5 is "extremely interested." 5-pt. scale

Intent to Visit in 2024

Intent to visit Connecticut (48%) also increased three points in 2024 over the 45% posted last year, while average intent to visit the comp set (50%) slipped by two points.

The same phenomena occurred among LGBTQ+ travelers, where intent to visit Connecticut improved by eight points from 40% last year to 48% in 2024. Meanwhile, as expected among the mass market, average intent to visit states in the comp set experienced a 1-point decline among the LGBTQ+ audience, dropping from 51% to 50% in 2024.

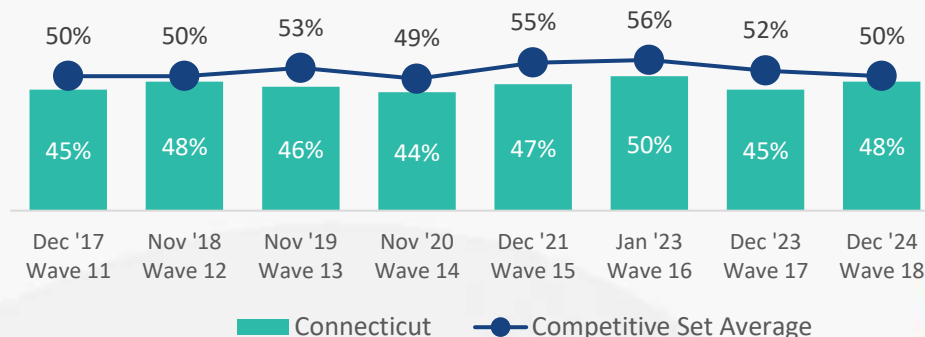
Intent to Visit in 2024 – Competitive States



LGBTQ+ ('24 | '23):
48% | 40% CT
50% | 51% Comp

Intent to Visit in the Next 12 Months History

CT Historical Average: 47%



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

Travelers are most likely to think of beaches, Long Island Sound, Yale, Mark Twain house, casinos, fall foliage and urban centers when thinking of the State of Connecticut.

Coastal & Water
Features

*"Beaches" (mentioned frequently). "Long Island sound."
"Shoreline." "Mystic Seaport"*

Historical
Institutions

*"Yale University." "Mark Twain House." "Historical sites."
"Colonial New England."*

Entertainment &
Attractions

*"Casinos" (frequently mentioned). "Foxwoods." "Mohegan Sun."
"Mystic Aquarium." "Museums." "Mystic Pizza."*

Natural Beauty
& Seasons

*"Fall foliage." "Beautiful natural scenery." "Fall leaves."
"Nature trails."*

Urban Centers &
Culture

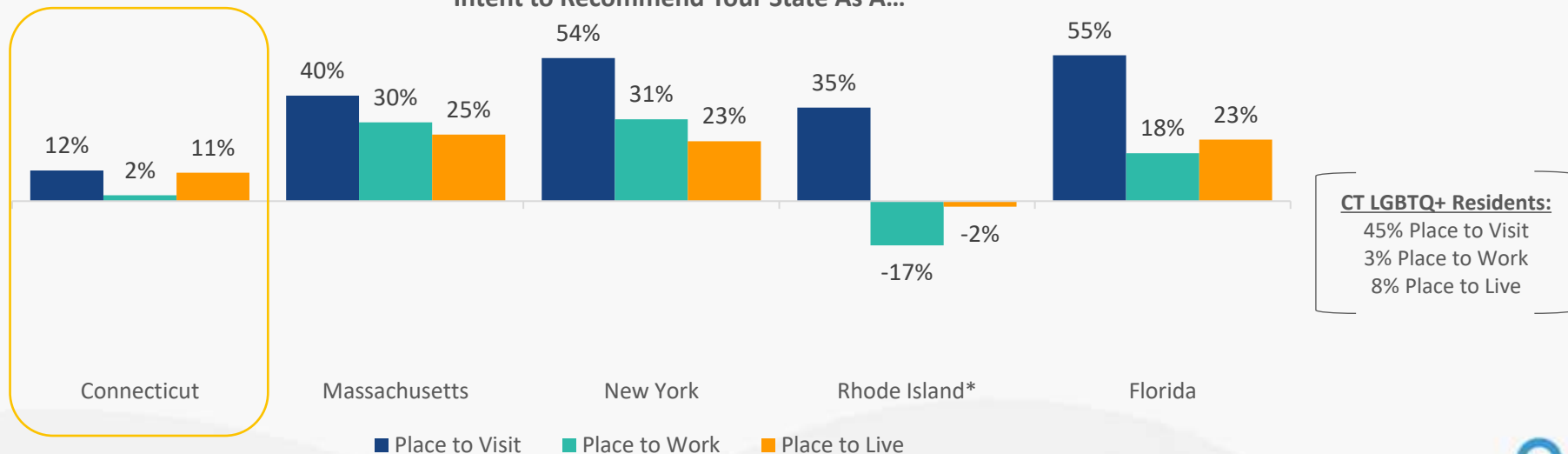
*"Hartford." "New Haven." "Pizza" (mentioned frequently)
"Greenwich"*

Intent to Recommend

This year, a series of Net Promoter Scores (NPS) were added to the survey. Among residents, 40% (% Promoters) indicated they would be extremely likely to recommend Connecticut as a Place to Visit, 32% 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.

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

*Sample size less than 125 and should only be used for directional purposes only.

Connecticut as a Place to Visit

Promoters of Connecticut as a place to visit say they would recommend the state because of its natural beauty, historical significance, coastal appeal, accessibility and diverse activities. But Detractors and Neutrals feel there is limited entertainment or attractions and it is a pricey place to visit.

Lacks Entertainment & Attractions

"Not much to see or do." "It has some nice parts but overall, its boring." "Great for low key activities but not very lively."

Cost-Related Concerns

"Too expensive"
"It's really expensive to live here and there are too many taxes"

Limited Knowledge/Exposure

Never really heard anybody going there"
"I don't know much about this place"

Limited Appeal

"It didn't have many attractions"
"I think there are states with more activities for visitors"
"It's not the most desirable for places to visit"

Cost & Climate Concerns

"It is a very nice state but it is expensive and it can be difficult to make ends meet"
"It is cold and has a poor Economy"

Natural Beauty

"Beautiful scenery, lots of variety and things to do, all seasons and options of when to visit."

Historical Significance

"Historical Attractions: The state has rich historical sites."

Coastal Appeal

"Coastal Charm: Connecticut offers beautiful coastal areas, especially along Long Island Sound, with scenic beaches."

Geographic Accessibility

"The proximity to New York City and Boston gives residents the best of both worlds: a peaceful home life with easy access to big cities."

Diverse Activities

"Lots to do, populated where businesses thrive, by the ocean so has a nice vacation vibe and many activities to participate in."

Connecticut as a Place to Work

Promoters of Connecticut as a place to work say they would recommend the state because of its strategic location, strong economy & job market, professional environment and quality of life balance. But Detractors and Neutrals feel Connecticut has a high cost of living & taxes, limited job market, accessibility challenges and geographic trade-offs.

High Cost of Living & Taxes

*"Because it is hard (expensive) to operate a business here so many employers move."
"The taxes here are very high so its hard to get by"*

Strategic Location & Accessibility

"Close to NYC. Good commuter rail, lots of banks all make business easier." "It's well located between Boston and New York."

Limited Job Market

"Not a lot of jobs in my field." "Job market is not good." "not many choices other than industries/building/insurance companies."

Strong Economy & Job Market

"Great small businesses and lots of jobs." "There are many great opportunities to establish your career in CT."

Accessibility Challenges

"Traffic is too heavy. Interstate roadways are poorly designed." "The state is always in construction and traffic is terrible"

Professional Environment

"Strong sense of community, safe and affluent community." "The people that live here are mostly intelligent and well informed about their surroundings"

Mixed Economic Picture

"Good salaries and many industries, career opportunities" but "Taxes too expensive"

Quality of Life Balance

"It has a good structure and easy to get around." "Connecticut is safe, beautiful and becoming very small business oriented."

Geographic Trade-Offs

*"Long commute, but good places to work."
"I feel it is a decent place to visit, but it lacks the living options of Boston or New York City"*

Connecticut as a Place to Live

Promoters of Connecticut as a place to live say they would recommend the state because of its strategic location, quality of life, educational excellence, natural beauty and economic opportunities. But Detractors and Neutrals feel the high cost of living, climate, lack of excitement, pros and cons and limited knowledge prevent them from recommending Connecticut.

High Cost of Living

*"It is extremely expensive to live here."
"Small state with not a lot of affordable housing and very high taxes and utilities."*

Strategic Location

"Close proximity to New York City and Boston. Some of the top colleges and universities are located in Connecticut"

Climate & Location Challenges

"I don't want to live in Connecticut it's too cold." "I'm sure it's wonderful in the summer and spring but I don't love the cold and snow"

Quality of Life, Safety

"Beautiful state, like minded people, safe, easy access to NYC." "It's high end, safe and has great communities."

Lack of Excitement

*"Its not a busy or popular area. no attractions. why would i start a business there."
"It is a boring state to live."*

Educational Excellence

"Great schools, proximity to big cities, great social services." "Some of the top colleges and universities are located in Connecticut."

Trade-Offs, Pros & Cons

*"Great business and food. The only downside is the cold weather during winter."
"Seems safe and good place to build family but not as diverse or many job opportunity."*

Natural Beauty & Recreation

"With its lush forests, picturesque coastline, and charming towns, Connecticut offers plenty of opportunities for outdoor recreation"

Limited Knowledge

"I don't live in Connecticut. Don't know much about it nor have any drive to visit." "Not really familiar with the state."

Economic Opportunities

"Strong Economy: The state boasts a robust economy with major industries like finance, insurance, and healthcare"

Persuading a larger number of travelers to recommend Connecticut as a place to visit may be challenging. Most say they'd need discounts, more tourist attractions, better infrastructure, more information and improved safety.

Cost Reduction

*"Cheaper hotel room rates." "Lower cost of living."
"The cost of everyday goods are still fairly expensive."*

More Tourist
Attractions

*"More things to do, especially for adults without kids who have no
interest in gambling/casinos." "More theme parks and stuff to do."*

Better
Infrastructure

*"Better driving infrastructure to relieve traffic." "Connecticut highways
are a disaster." "Expanding train routes and bus services."*

More
Information

*"More identity other than New York suburb, more ideas on what
attractions are in Connecticut." "Learning more about other cities in
which I have not been to before."*

Improved Safety

*"Make New Haven and urban areas safe." "More punishing of crime so
as to deter it."*

Marketing Insights & Considerations for Encouraging More Travelers to Recommend

There is much to love about Connecticut. The preponderance of information provided by travelers throughout all of their verbatim responses may help to shed additional light on the types of things that state marketers may consider in helping to promote the state as a place to live, work and play.

While these ideas may have already been incorporated in some of the state's varied marketing programs and messaging, it is always helpful to see such ideas reenforced by research.

Some ideas for encouraging additional recommendations might include the leveraging of Connecticut's unique location, its four-season appeal, outstanding educational excellence, the state's blend of American history and modern amenities as well as providing comparative cost-of-living analysis with nearby major cities or neighboring states.

Leverage
Location

Position Connecticut as the ideal "best of both worlds" solution – offering peaceful living with easy access to large metros

Four-Season
Appeal

Showcase the state's diverse natural attractions: beaches, forests, hiking trails, fall foliage

Focus on
Education

*Promote the presence of prestigious institutions like Yale
Highlight the state's consistently high-ranking public schools*

Leverage Culture

*Emphasize the state's role in American history.
Showcase the blend of historical charm and modern amenities.*

Value Messaging

Create comparative cost-of-living analyses with nearby major cities. Highlight areas where Connecticut offers better value than neighboring states.

01. Brand Perception

02. Brand Health

03. Marketing Impact

04. Visitor Profile

05. Appendix

ALL RESPONDENTS/TRAVELERS | N=1,001; LGBTQ+ | N=257

ALL RESPONDENTS/TRAVELERS AWARE | N=713
ALL RESPONDENTS/TRAVELERS UNAWARE | N=288

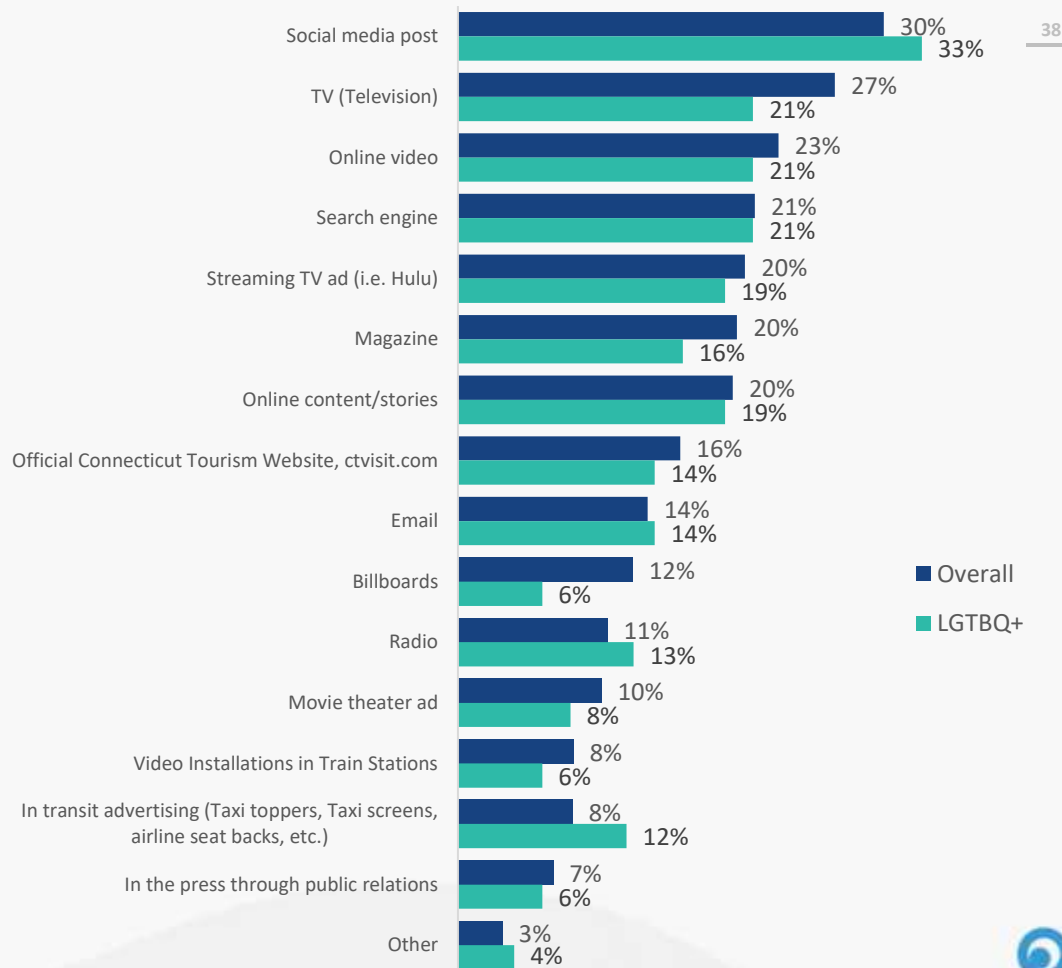
LQBTQ+ AWARE | N=168
LQBTQ+ UNAWARE | N=89

Marketing Awareness: LGBTQ+ vs. Overall

More than two-thirds (68%) of travelers in the targeted advertised markets recalled seeing Connecticut marketing messages, up three points over last year and two points over the state's historic average. The most common types of marketing recalled were social media posts, on television or an online video or from their search engine efforts.

LGBTQ+ audiences (65%) were slightly less likely than the general population to recall seeing at least one of Connecticut's marketing communications, but still five points higher than last year.

The LGBTQ+ audience is most likely to have seen marketing messages in the same types of marketing as overall travelers. But this group reported they were somewhat more likely to have seen marketing messages through social media, radio or in transit advertising.



Interest & Intent

Aware vs. Unaware of CT Marketing

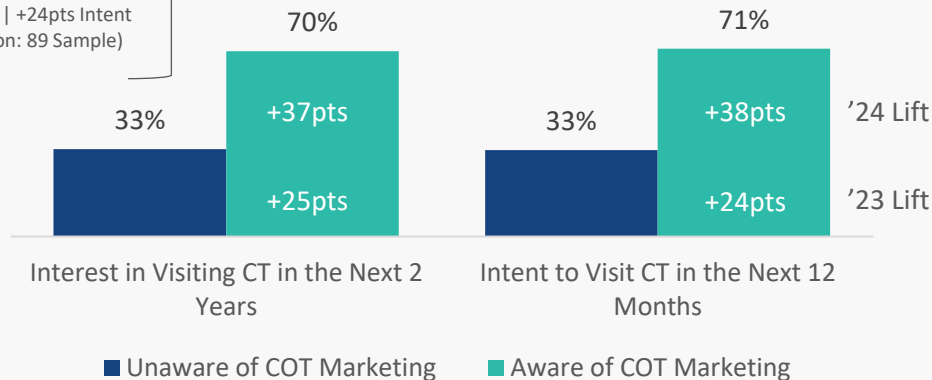
Once again, Connecticut's marketing efforts not only impacted traveler perceptions of the state as a travel destination but also increased both interest and intent to visit Connecticut in the next 12 months—and by even larger amounts recorded in 2023.

In 2024, travelers reached by Connecticut's marketing efforts indicated they were 37 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 38 points more likely visit Connecticut in the next 12 months.

Marketing continues to deliver a remarkably positive impact on both interest and intent to visit Connecticut. Interest was the highest ever recorded, and intent earned its second highest rating.

Similarly, both interest and intent also increased among LGBTQ+ travelers too.

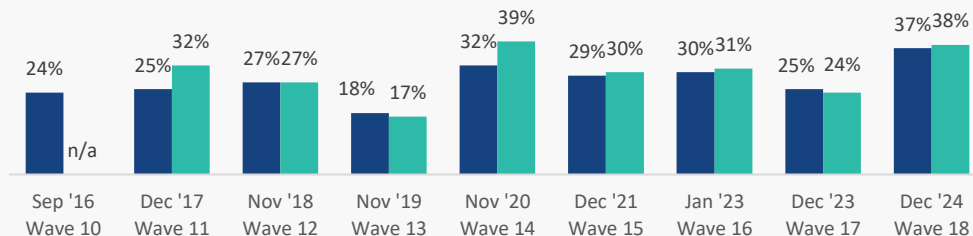
LGBTQ+ ('24 | '23):
+43pts | +21pts Interest
+44 pts | +24pts Intent
(Caution: 89 Sample)



LGBTQ+ ('24 | '23):
55% | 42% Interest
48% | 40% Intent

Marketing Lift Impact History

Interest +27% | Intent + 30%



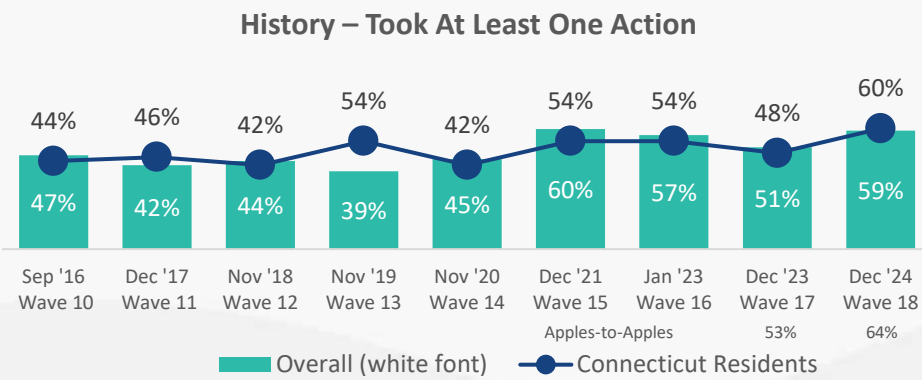
■ Interest in Visiting - 2 Years ■ Intent to Visit - 12 Months

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 travelers in the geographic markets targeted, and the impact of those marketing efforts had a positive impact on both brand perception and intent to visit Connecticut. The most prominent actions travelers indicated they are most likely to take as a result of seeing those marketing efforts includes doing some research on Connecticut and/or planning to visit.

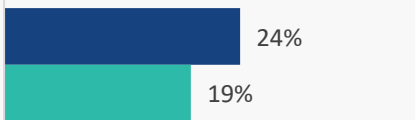
Overall, more than half (59%) of overall travelers indicated they would take at least or more of these actions, and this ratio falls to 56% among LGBTQ+ travelers reached by the state’s marketing efforts.



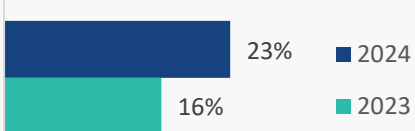
I looked into, or did some research, on visiting Connecticut after seeing or hearing an ad



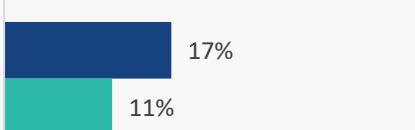
I am planning to visit Connecticut in the next year as a result of seeing or hearing an ad



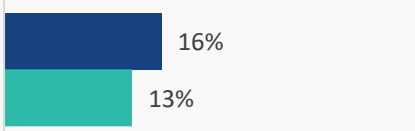
I specifically visited the Connecticut website (or ctvisit.com) after seeing or hearing an ad to find out more about the state



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



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



LGBTQ+ ('24 | '23):
56% | 37% - Took At Least 1 Action

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 2023? Please select all that apply.

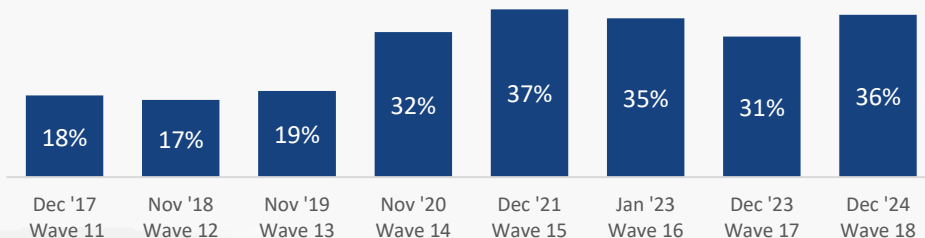
Marketing Communications

Travelers who were reached by Connecticut's marketing efforts in 2024 were also significantly more likely to view Connecticut as a great place for a short getaway or to spend time with family, and as a place worth visiting in the future.

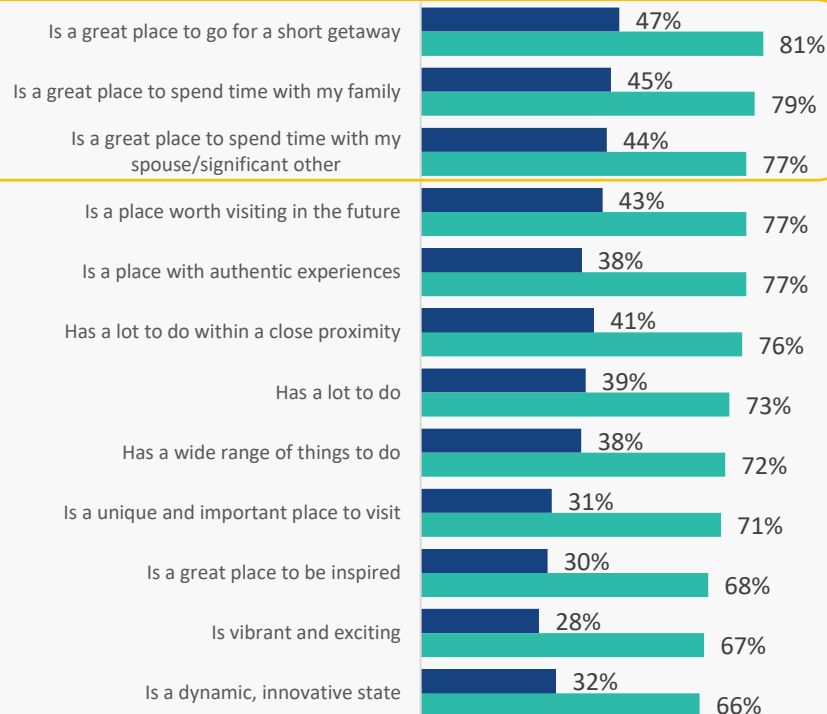
Every marketing takeaway associated with the state of Connecticut scored higher among those reached by the marketing for the state than those unfamiliar with the state's marketing efforts. Likewise, the average variance between ad aware and unaware travelers was +36% in 2024, up five points from 2023.

Average Ad Communications Lift History

Historic Average 28%



% Agree/Strongly with Statements After Seeing Marketing



■ Unaware of COT Marketing

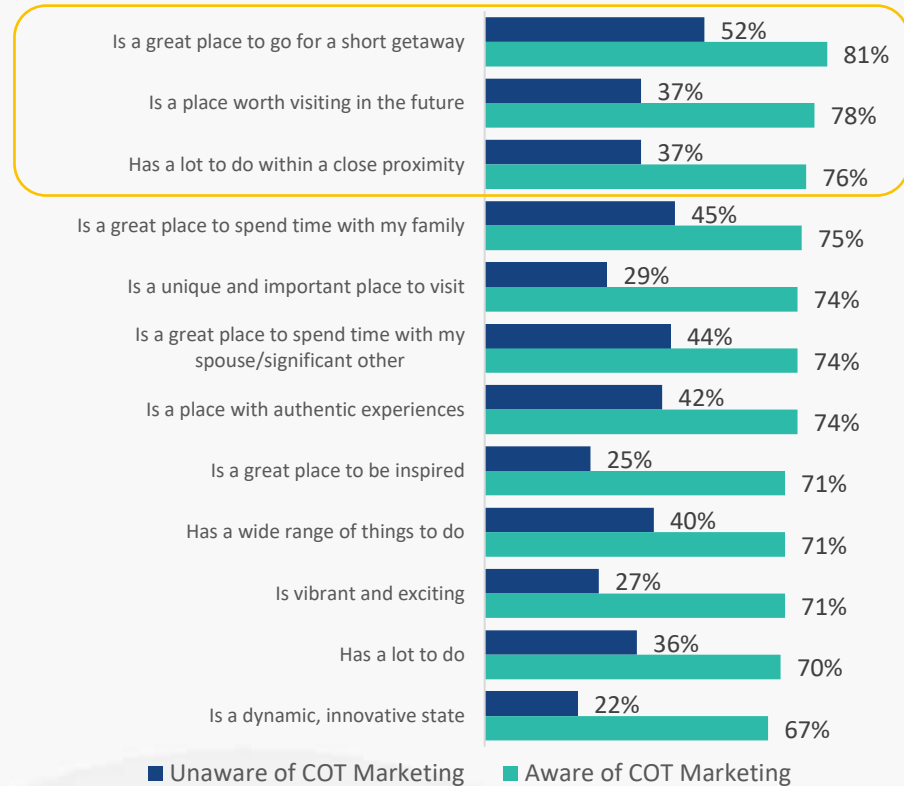
■ Aware of COT Marketing

LGBTQ+ Marketing Communications

LGBTQ+ travelers who saw the state's marketing efforts had feelings that largely mirror those of the general population. Most LGBTQ+ travelers feel that Connecticut is a great place for a short getaway or spend time with a significant other, and/or a place with authentic experiences.

Also like the overall audience, the LGBTQ+ community reached by Connecticut's marketing efforts exhibited much stronger and more positive perceptions of the state across every key message point, generating an average lift of +37 points in 2024.

% Agree/Strongly with Statements After Seeing Marketing



01. Brand Perception

02. Brand Health

03. Marketing Impact

04. Visitor Profile

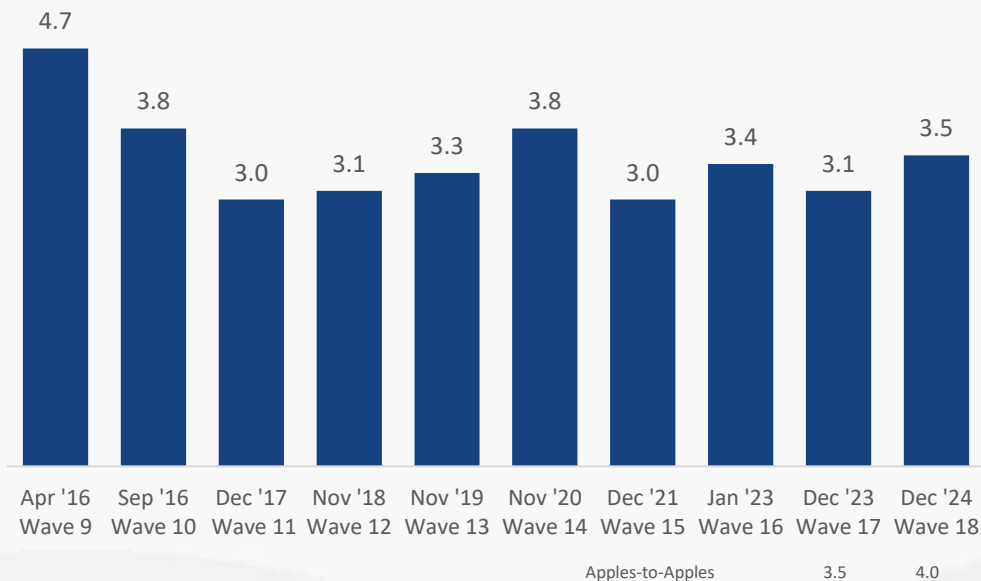
05. Appendix

ALL RESPONDENTS WHO VISITED CONNECTICUT IN THE PAST
5 YEARS | N=404; LGBTQ+ | N=93

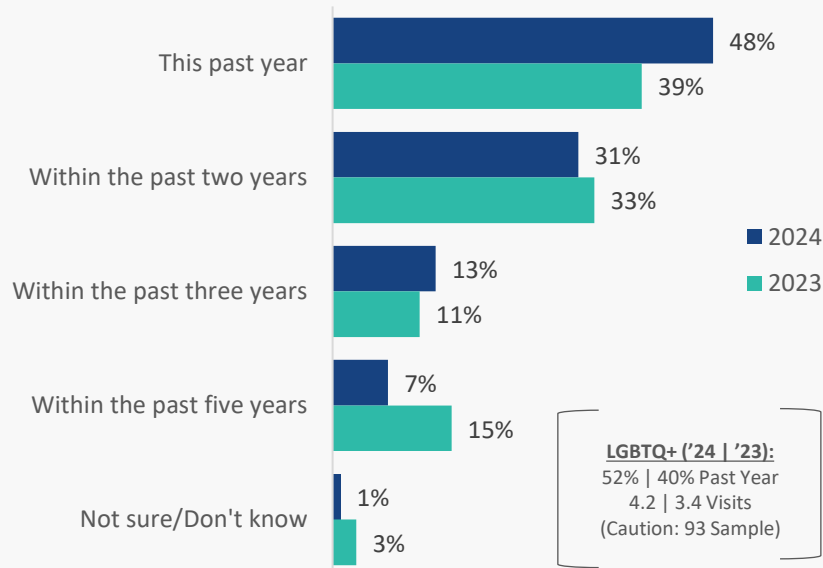
ALL RESPONDENTS WHO VISITED CONNECTICUT IN THE PAST
2 YEARS | N=351; LGBTQ+ | N=73

Of those travelers who have visited Connecticut in the past five years, nearly half (48%) report last visiting in 2024 and say they visited an average of 3.5 times.

Number of Visits to Connecticut
In the Past 5 Years



Most Recent Visit to Connecticut

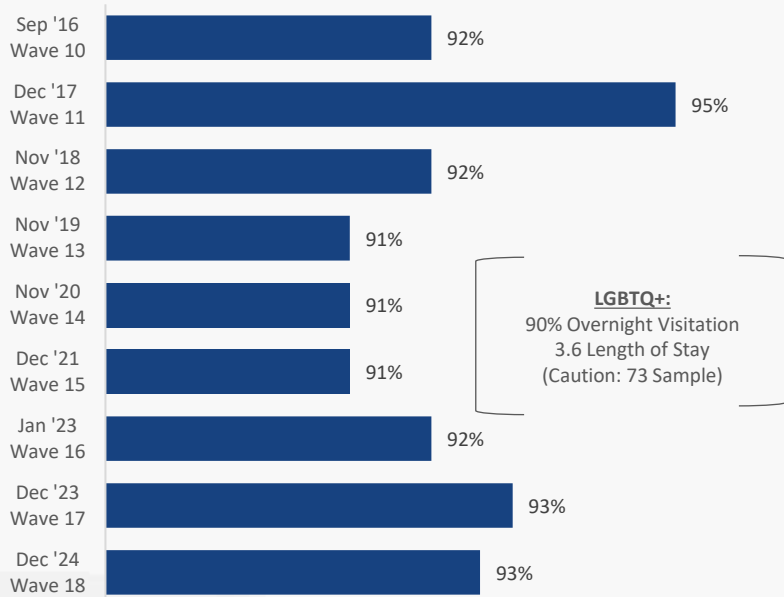


LGBTQ+ ('24 | '23):
52% | 40% Past Year
4.2 | 3.4 Visits
(Caution: 93 Sample)

How many times have you visited Connecticut for a getaway in the past 5 years?
How long has it been since you last visited Connecticut for a getaway/day trip?

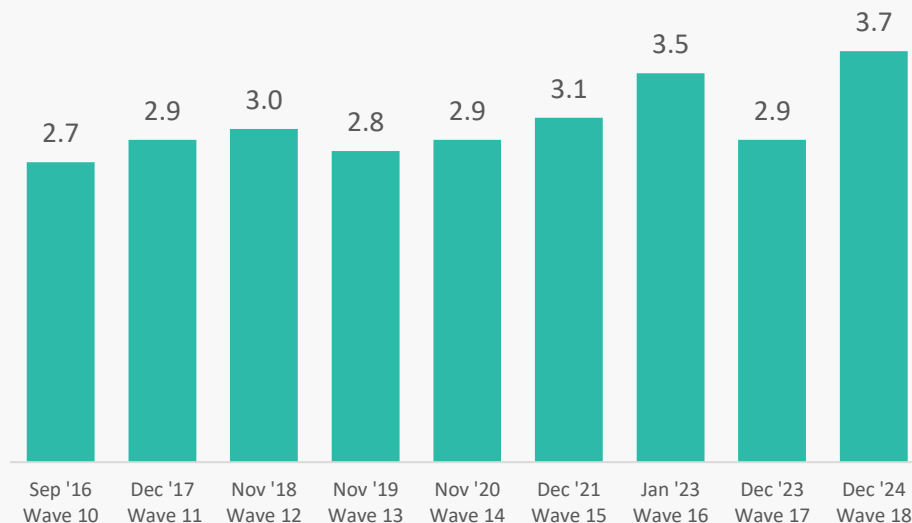
More than nine in ten (93%) of Connecticut travelers (within the past two years) spent the night in the state in 2024 and posted an average length of stay of 3.7 nights, the highest ever recorded in this study.

Overnight Visitation to Connecticut - History



Length of Stay – History

Historic Average 3.1 Nights

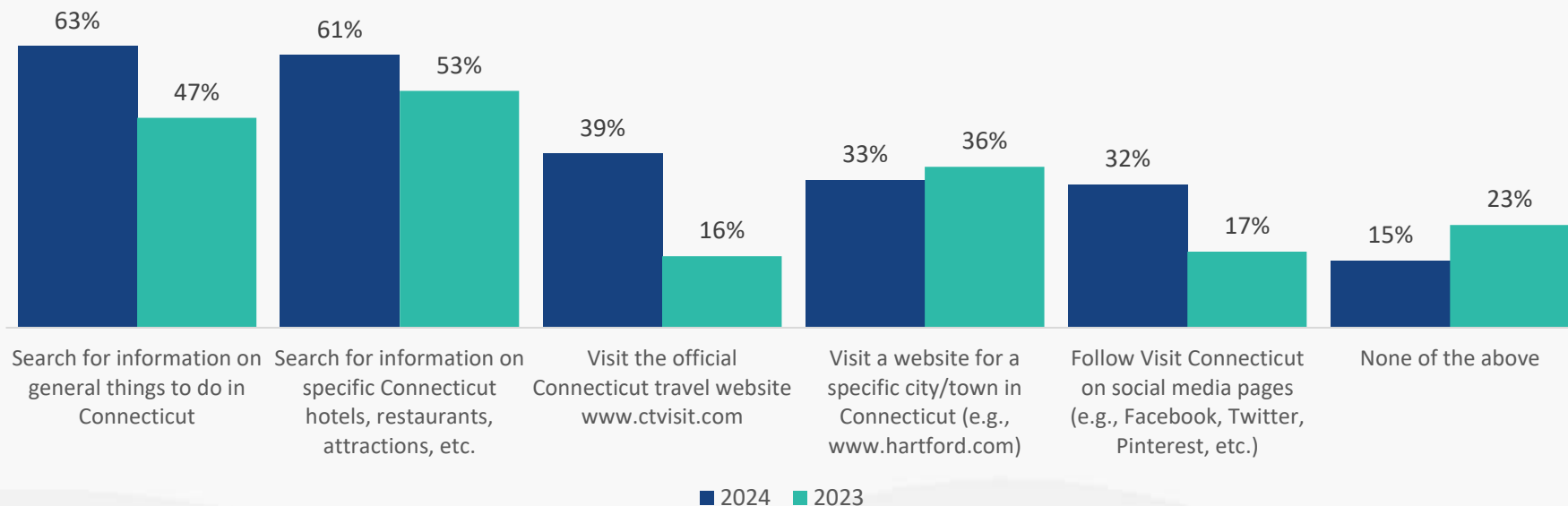


Apples-to-Apples

2.8

2.7

Connecticut visitors indicated they were most likely to have searched for information on either general things to do in Connecticut or for specific hotels, restaurants and attractions. And far more (39% vs. 16% last year) indicated they visited the official Connecticut travel website, ctvisit.com.



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 similar household incomes, were a bit older and somewhat more diverse in 2023 than reported in recent years.

LGBTQ+ visitors to Connecticut earn higher incomes (\$154k vs. \$143k), are a bit younger (40.6 yrs vs. 44.3 yrs) and are less diverse (24% vs. 25%). They also visit less frequently (4.2 visits vs. 4.5) and exhibit lower intent to visit (72% vs. 82%).

Category	2024 Visitors	2023 Visitors	2022 Visitors	2024 LGBTQ+ Visitors	2023 LGBTQ+ Visitors
Household Income	\$143.0k	\$143.5k	\$142.8k	\$154.0k	\$148.4k
Age of Travel Respondent	44.3	43.5	42.5	40.6	43.0
25-34	18%	16%	22%	27%	16%
35-44	38%	42%	38%	39%	42%
45-64	44%	42%	40%	35%	42%
Interest in Visiting Next 2 Years	70%	57%	61%	66%	61%
Intent to Visit Next 12 Months	82%	74%	74%	72%	84%
Number of Visits Past 5 Years	4.5	4.0	4.1	4.2	5.3
White, Non-Hispanic*	75%	79%	81%	76%	84%
Black, Non-Hispanic	9.3%	7.3%	5.9%	8.6%	7.9%
Hispanic	8.1%	6.8%	8.5%	10.8%	7.9%
Asian	6.3%	6.1%	5.1%	3.2%	5.3%
Other	4.0%	4.2%	3.0%	5.4%	2.6%
LGBTQ+	9.4%	5.3%	6.5%	100%	100%

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

01. Brand Perception

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05. Appendix

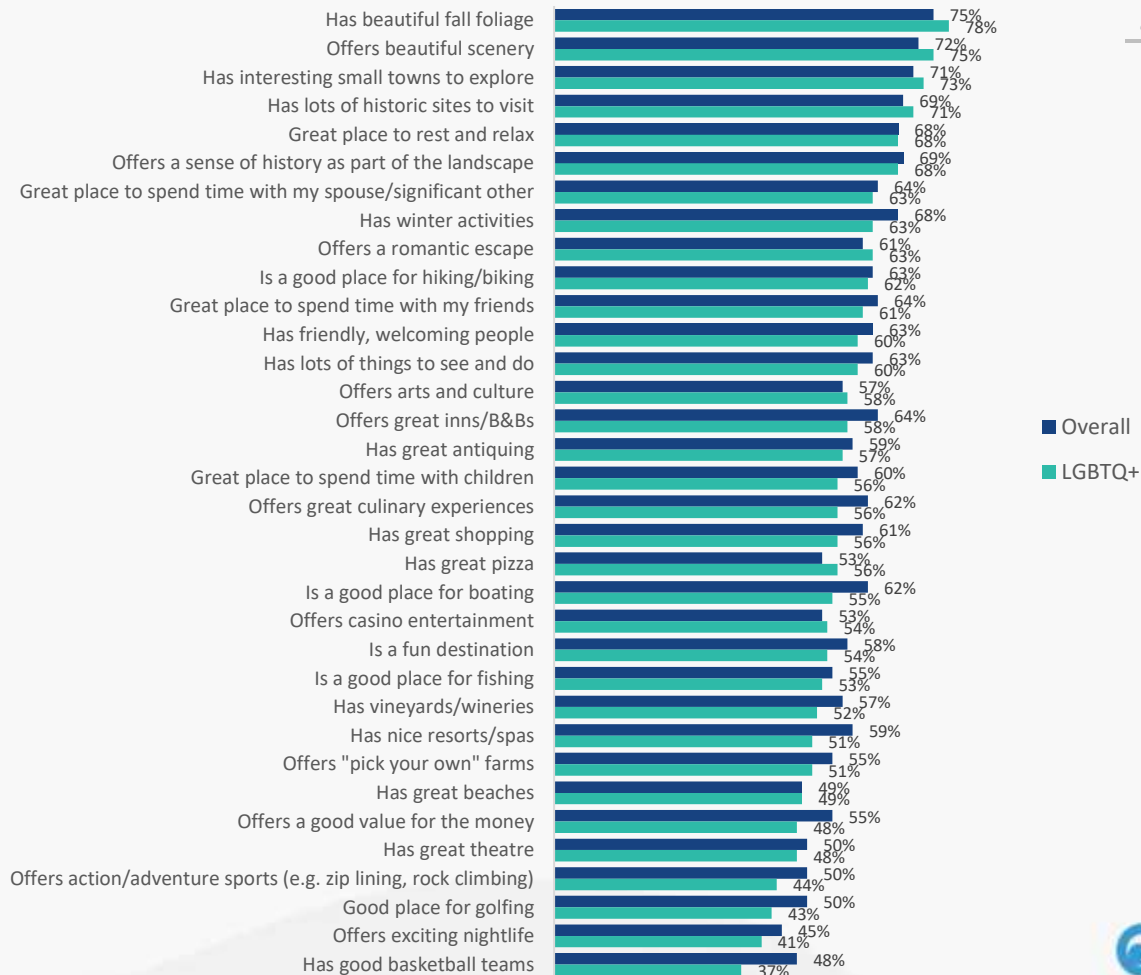
Brand Characteristics

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

LGBTQ+ travelers rate Connecticut highest for its beautiful fall foliage (75%), beautiful scenery (72%) and interesting small towns (71%).

Contextually, the brand attributes the LGBTQ+ community rate higher than the gen pop audience include beautiful fall foliage (+3 points), beautiful scenery (+3 points) and great pizza (+3 points).

Conversely, has good basketball teams (-11 points), good place for golfing (-7 points) and has nice resorts/spas (-8 points) rate much lower than gen pop travelers.



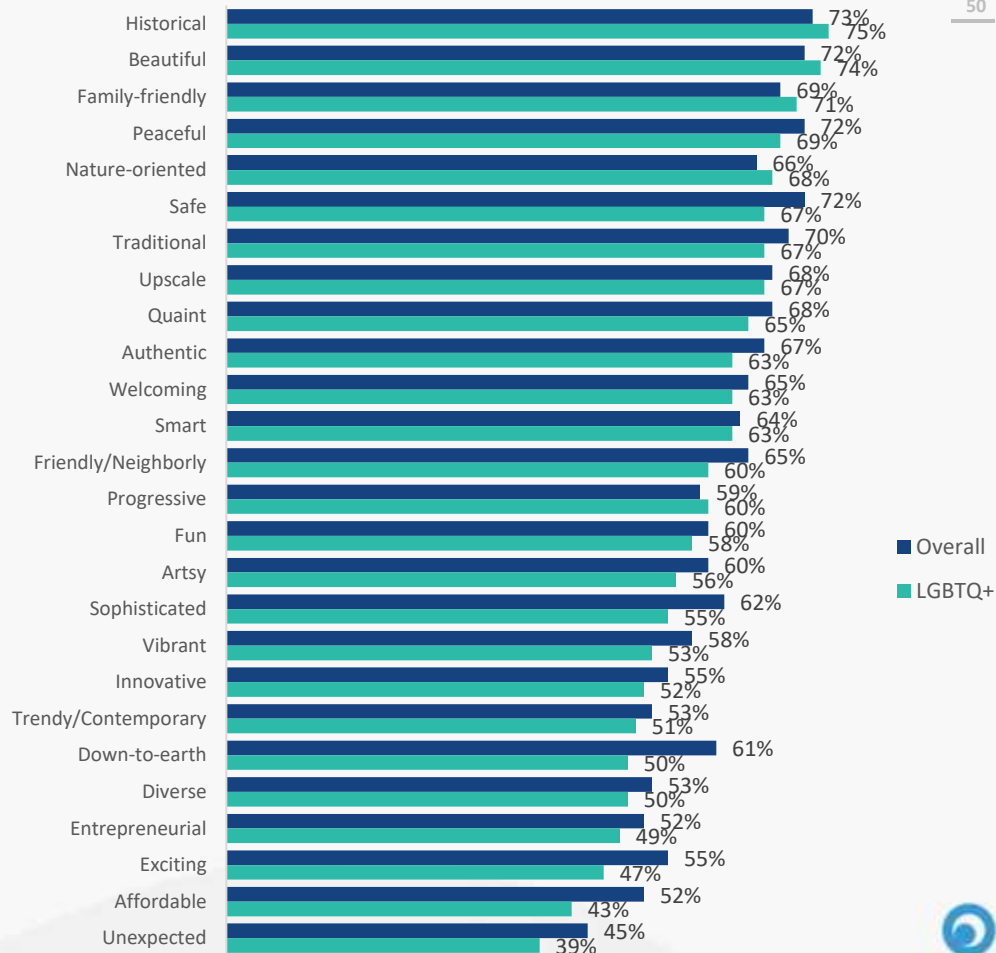
Brand Descriptors

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

The LGBTQ+ audience rates Connecticut highest for being historical, beautiful and family-friendly.

Contextually, the LGBTQ+ audience tends to rate Connecticut as being more beautiful (+2 points), family-friendly (+2 points) and historical (+2 points) than the overall audience.

Conversely, this audience rates the state lower than gen pop travelers for being down-to-earth (-11 points), affordable (-9 points) and exciting (-8 points).



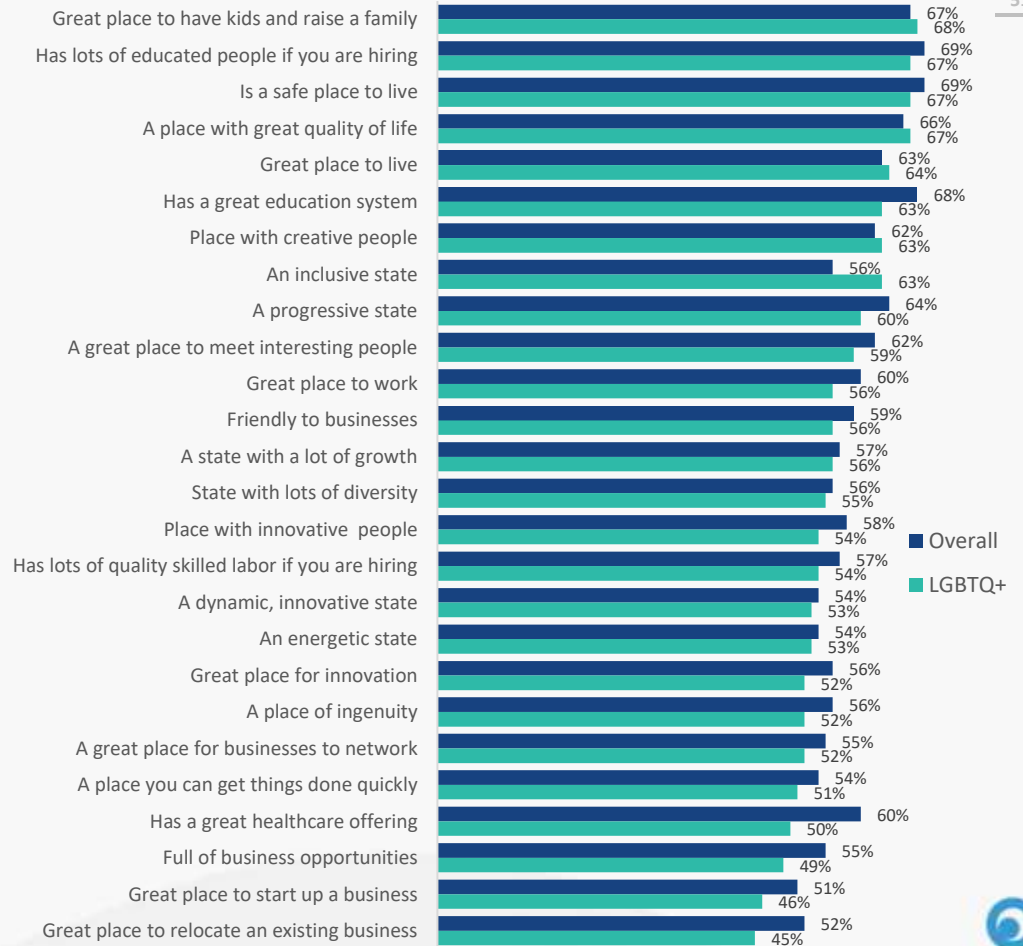
Business Characteristics

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

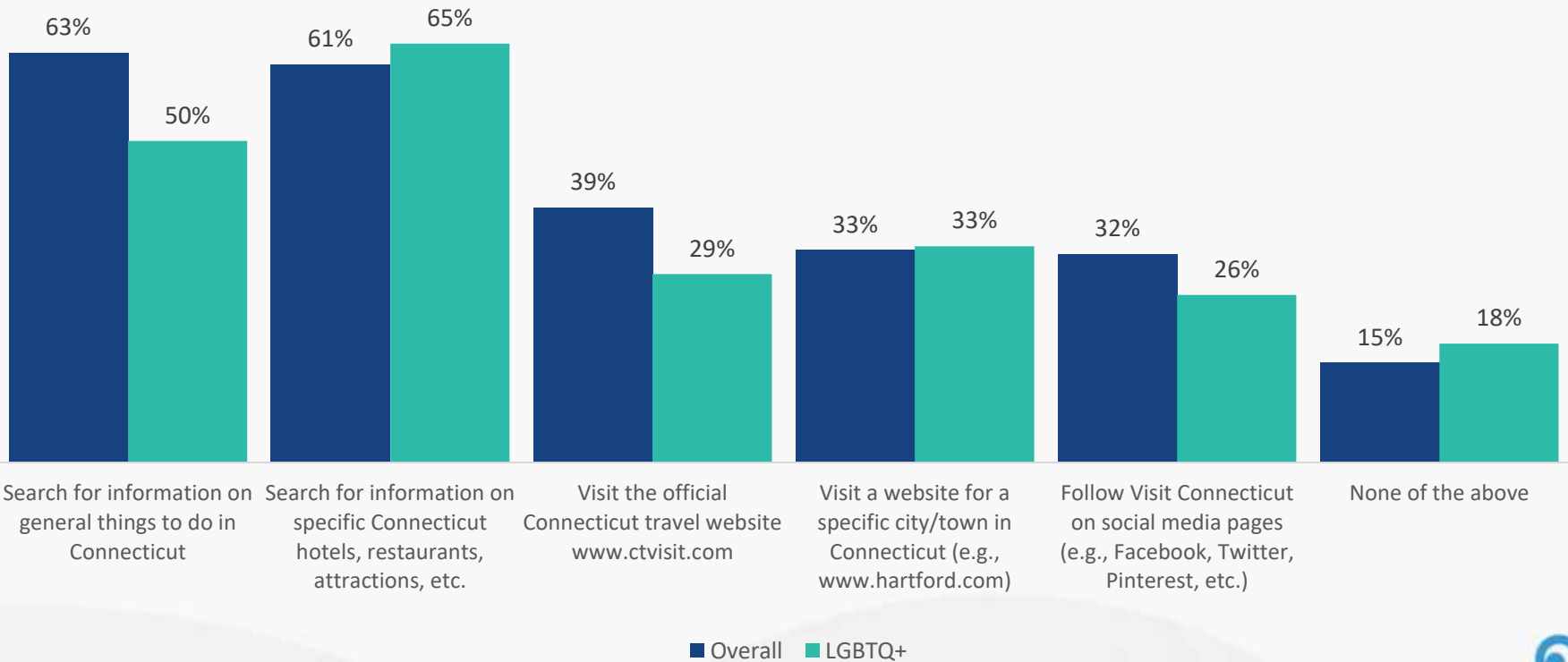
LGBTQ+ travelers rate Connecticut highest for being a great place to have kids/raise a family, having lots of educated people if you are hiring and being a safe place to live.

Contextually, the LGBTQ+ audience tends to rate Connecticut higher for being an inclusive state (+7 points) and being a great place to live (+1 point).

Conversely, this same audience rates Connecticut lower than average for having a great healthcare offering (-10 points), being full of business opportunities (-6 points) and for being a great place to relocate a business (-7 points).



Contextually, LGBTQ+ visitors are more likely to say they searched for information on specific hotels, restaurants or attractions, but significantly less likely to search for general things to do in Connecticut.



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

THE CLOSEST TO THE CUSTOMER WINS.

