VISION INDEX
Connecticut's Visitor Attendance Index

Vol 1704

2017 Autumn & Year-End

Expanded Panel Tracks #Visitors Down 3.6%, $Value Up 3%

VISION Index – Provides critical visitor activity context for those evaluating changes in performance metrics at State, regional, local and attraction levels. The VISION Index tracks monthly attendance at a diverse, consistent panel of 30 of the State's leading attractions.

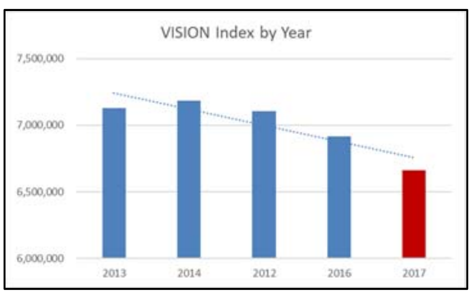
Expanded Panel

The VISION Index is reset in this report to include seven additional panelists. References to prior years will be based on the *expanded* panel and so, are adjusted from any data previously reported.

The expansion was to better represent the diverse tourism experiences offered across the State. Appended is a list of panelists and comparisons of this expanded panel to its predecessor.

6.8% Decline since 2013 Benchmark

After a bump in 2014, a declining trend since.

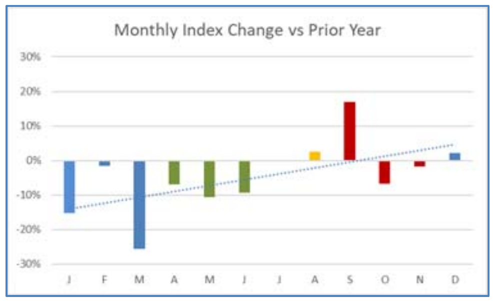


First Half of *Fiscal* Year '18 Up 1.8%

For those using a Fiscal Year beginning in July, the first half of this year was up 1.8% over this time last year, benefiting from the break-even Summer and a strong September. That contrasts with the negative 6.1% to date at this time last year, and the rest of the FY '17's steady decline.

2017 Year Index Down 3.6%

The year's VISION Index tracked 3.6% behind 2016 (2016 was 2.6% behind 2015). Generally, the trend was recovery from a jaundiced January and a miserable March.



Blue Winter Green Spring Yellow Summer Auburn Autumn

The recovery began with a "break even" summer that led to a strong September punctuating an otherwise weak Autumn.

Notably, only three months of 2017 were ahead of last year (Aug., Sep. and Dec.).

Only one-in-three panelists finished 2017 ahead of last year.

Economic Value Gain of 1.5% ($211 Million)

Despite the 3.6% decline in the *number* of visitors from last year, those who visited spent 5.3% more than they did in 2016, netting an estimated 1.5%, $211 Million gain in economic value.*

*Value is calculated extrapolating data from this report and the following:
1) 2015 Tourism Impact was estimated to be $14.7 Billion of which 59% ($8.7 Billion) was Direct Spending.
- Source: *Economic Impact of Travel in Connecticut for year 2015*
2) Direct Spending/Party was $ 717 in 2017, $681 in 2016, $691 in 2015
- Source: *VISION Intercept Study 2017*.

Autumn 2017 Index Up 2.9%

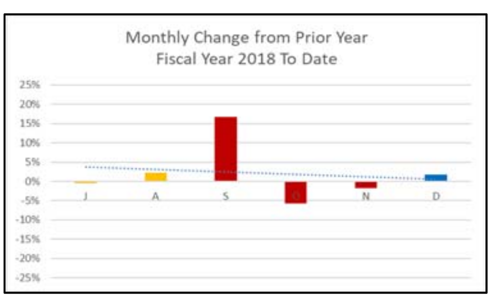
The year's autumn Season (Sep – Nov) VISION Index tracked 2.9% ahead of last year thanks to a strong September that built a reserve for the next two months' slight declines.

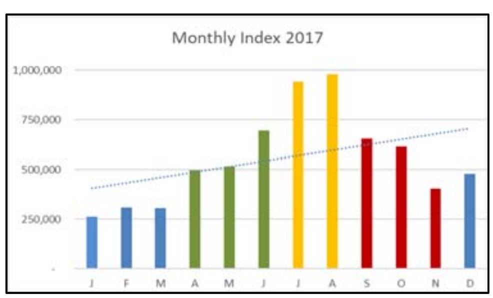
This year's slight gain is in contrast to last year's fall which finished 3.1% behind 2015.

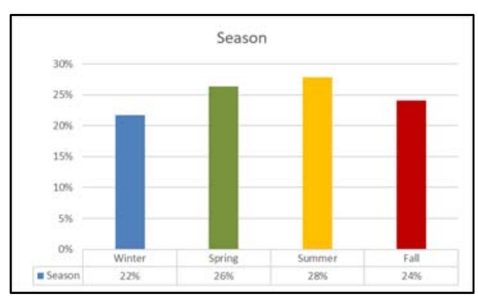
25% of the Year's Visitors Came During Autumn

Typically, about a quarter of a year's total visitors come during the fall.

Meanwhile, about a quarter come during the spring, 30% during the *two* months of summer (Jul–Aug) when most schools aren't in session, and one fifth of all visitors come during the *four* winter months (Dec.–Mar.).







Blue Winter Green Spring Yellow Summer Auburn Autumn

Publication of:

Witan *Intelligence, Inc.* Marketing Research ♦ Intel-based Strategy
Over 30 years helping remarkable clients *"Know to Grow!"*

860-675-0231
www.WitanIntelligence.com

Connecticut still revolutionary

VISION INDEX
Connecticut's Visitor Attendance Index

Comparison

VISION Portfolio:

For over 20 years VISION studies have tracked tourism activity of Resident and Out-of-State visitors. Together they deliver a Statewide perspective both; a) point-in-time and b) longitudinal, to help stewards of tourism investment understand visitors to make informed decisions and then to measure performance. The sister studies; VISION Index and VISION Intercept are relied on by those responsible for Connecticut's jobs and quality-of-life, including those in legislature, human resources, media, economic development, chambers of commerce, destination marketing, events, culture and the arts.

VISION Index Panel

The following VISION Index panelists are thanked for their time and attention extended every month to provide their *confidential* performance data. To ensure objectivity, panelists neither pay a fee nor receive any compensation to participate in the VISION Index… beyond the goodwill of their tourism colleagues:

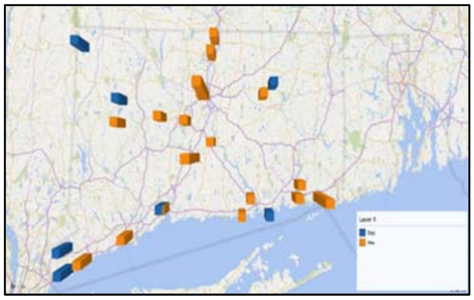
Bellamy-Ferriday House & Garden
Brownstone Exploration & Discovery Park
Butler-McCook House House & Garden
Connecticut's Beardsley Zoo
Connecticut Science Center
Florence Griswold Museum*
Hempsted Houses
Isham-Terry House
Lake Compounce Family Theme Park
Lime Rock Park*
Long Wharf Theater*
Lyman Orchards
Lyman Orchards' Golf
Maritime Aquarium at Norwalk[1]
Mark Twain House[1]
Mystic Aquarium[1]
Mystic Seaport[1]
Nathan Hale Homestead
New Britain Museum of Art
New England Air Museum[1]
Phelps-Hatheway House & Garden
Powder Ridge Mountain Park & Resort
Stamford Center for the Arts*
Stamford Museum and Nature Center*
Submarine Force Museum / USS Nautilus
UConn Lodewick Visitors Center*
Valley Railroad / Essex Steam Train & Riverboat[1]
Westbrook Outlets
White Flower Farm*
Yale University Art Gallery

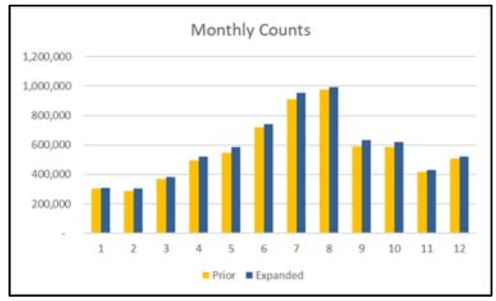
Note: New Panelists provided prior years' monthly history, enabling calculation of changes for the Expanded Panel.
**New panelist (7)*
[1]*Founding panelist (6)*

Benefits of the Expansion include:

- More precision (larger sample)
- Broader geographic coverage (e.g. Fairfield and Litchfield areas)
- Greater diversity of experience categories (e.g. the Arts)
- More stability (i.e. less volatility and influence of any single panelist)

- 30% more *panelists* (23 expanded to 30). Benefits of the expansion include:
- 8.5% more *visitors* counted per year (6.4 Million expanded to 6.9 Million)

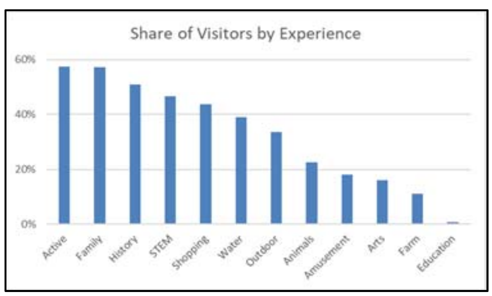


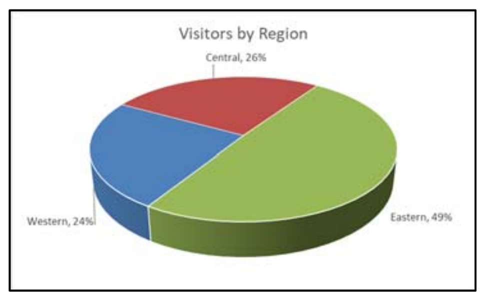


Panelist Locations (*New Panelists in Blue)* Monthly Count Comparison

The expanded panel now reflects a more diverse range of visitor experiences by audience, topic and the nature of the activity. Note that a number of panelists deliver two or more of the categories (e.g. the aquariums are included in animals, water, family and STEM.)

About a quarter of all visitors visiting the Eastern Region with the balance split about evenly between the other two Regions.





Free downloads - The Statewide VISION Index and VISION Intercept reports published by Witan *Intelligence, Inc.* are available; posted on the State's tourism website or by contacting Witan directly. More detailed and/or custom reports by subscription or a fee.

State Subsidy for Custom Visitor Research

Succeed Sooner – Any State attraction or Event wanting to measure their economic impact or to lower costs of their own visitor research, can now save by piggy-backing custom confidential questions, sampling and analysis on the State's VISION Intercept study. The State offers this for two simple reasons: 1) Larger samples and 2) It wins when its constituents succeed (intel works!). The VISION platform essentially is a no-strings, no-application research "grant," with the advantage of a long history of State-wide, regional and category benchmarks.

VISION INDEX

Connecticut's Visitor Attendance Index

	Month			YTD		2017	SeasonTD			FYTD	7/'17 - 6/'18	
	Prior	Current	% Chg.	Prior	Current	% Chg.	Prior	Current	% Chg.	Prior	Current	% Chg.
	485,428	493,705	1.7%	7,172,236	6,915,856	-3.6%	485,428	493,705	1.7%	4,114,610	4,189,089	1.8%
Jul	1,024,481	957,409	-6.5%	4,004,392	4,015,035	0.3%	1,024,481	957,409	-6.5%	1,024,481	957,409	-6.5%
Aug	1,048,298	972,651	-7.2%	5,052,690	4,987,686	-1.3%	2,072,779	1,930,060	-6.9%	2,072,779	1,930,060	-6.9%
Sep	637,273	577,018	-9.5%	5,689,963	5,564,704	-2.2%	637,273	577,018	-9.5%	2,710,052	2,507,078	-7.5%
Oct	666,345	690,051	3.6%	6,356,309	6,254,755	-1.6%	1,303,618	1,267,069	-2.8%	3,376,398	3,197,129	-5.3%
Nov	450,463	432,053	-4.1%	6,806,771	6,686,808	-1.8%	1,754,081	1,699,122	-3.1%	3,826,860	3,629,182	-5.2%
Dec	553,771	485,428	-12.3%	7,360,542	7,172,236	-2.6%	553,771	485,428	-12.3%	4,380,631	4,114,610	-6.1%
Jan	334,063	287,693	-13.9%	334,063	287,693	-13.9%	887,834	773,121	-12.9%	4,714,694	4,402,303	-6.6%
Feb	333,624	327,300	-1.9%	667,687	614,993	-7.9%	1,221,458	1,100,421	-9.9%	5,048,318	4,729,603	-6.3%
Mar	439,877	337,365	-23.3%	1,107,564	952,358	-14.0%	1,661,335	1,437,786	-13.5%	5,488,195	5,066,968	-7.7%
Apr	565,032	525,055	-7.1%	1,672,595	1,477,413	-11.7%	565,032	525,055	-7.1%	6,053,226	5,592,023	-7.6%
May	605,681	545,012	-10.0%	2,278,276	2,022,425	-11.2%	1,170,712	1,070,067	-8.6%	6,658,907	6,137,035	-7.8%
Jun	779,350	704,342	-9.6%	3,057,626	2,726,767	-10.8%	1,950,063	1,774,409	-9.0%	7,438,257	6,841,377	-8.0%
Jul	957,409	952,396	-0.5%	4,015,035	3,679,163	-8.4%	957,409	952,396	-0.5%	957,409	952,396	-0.5%
Aug	972,651	993,909	2.2%	4,987,686	4,673,072	-6.3%	1,930,060	1,946,305	0.8%	1,930,060	1,946,305	0.8%
Sep	577,018	673,493	16.7%	5,564,704	5,346,565	-3.9%	577,018	673,493	16.7%	2,507,078	2,619,798	4.5%
Oct	690,051	650,825	-5.7%	6,254,755	5,997,390	-4.1%	1,267,069	1,324,318	4.5%	3,197,129	3,270,623	2.3%
Nov	432,053	424,761	-1.7%	6,686,808	6,422,151	-4.0%	1,699,122	1,749,079	2.9%	3,629,182	3,695,384	1.8%
Dec	485,428	493,705	1.7%	7,172,236	6,915,856	-3.6%	485,428	493,705	1.7%	4,114,610	4,189,089	1.8%

Season Legend	
	Winter
	Spring
	Summer
	Autumn